

Format14CRM | SugarCRM Cloud – Service Definition

1. Service overview

SugarCRM Cloud is a software-as-a-service (SaaS) customer relationship management platform delivered by Format14CRM. It supports public sector organisations in managing customer interactions, cases, workflows, and reporting within a secure cloud environment.

2. Intended users

The service is suitable for central government departments, arm's-length bodies, local authorities, NHS bodies, and other public sector organisations requiring a configurable CRM capability.

3. Service scope

The service supports customer and contact management, case handling, sales and pipeline management, marketing activity tracking, workflow automation, dashboards, and reporting.

4. Key features

Web-based access, role-based access control, configurable data models, workflow automation, reporting and dashboards, API integration, audit logging, and data import/export.

5. Delivery model

The service is delivered as multi-tenant SaaS hosted on enterprise-grade cloud infrastructure. SugarCRM manages hosting, platform availability, patching, upgrades, backups, and disaster recovery.

6. Availability and resilience

The platform is designed for high availability using redundant infrastructure components. A 99.9% monthly availability target applies, excluding planned maintenance.

7. Security and information assurance

Security controls include encryption in transit and at rest, secure authentication, role-based access control, audit logging, and vulnerability management. Configuration supports alignment with public sector security policies.

8. Data protection and ownership

Customer data remains the property of the customer and is logically segregated within the platform. Data export is supported using standard formats.

9. Support and incident management

Support is provided via the SugarCRM support portal. Incidents are communicated via controlled communications, including email alerts and portal updates. Post-incident reports are available on request.

10. Service constraints

Internet access and a supported browser are required. Infrastructure-level customisation is not available within the standard SaaS model.

11. Onboarding

Onboarding includes environment provisioning, user setup, configuration, and knowledge transfer.

12. Offboarding and exit

At contract end, customers may export data and securely exit the service in line with contractual requirements.

13. Free trial

A time-limited cloud trial may be available for evaluation purposes. The trial excludes production use and guaranteed SLAs.

14. Format14CRM delivery & assurance

Format14CRM provides a consistent, platform-agnostic delivery and assurance approach aligned to DOS 7 expectations. This includes structured delivery, governance, risk management, security assurance, operational transition, and exit planning.

15. Public sector outcomes supported

The service supports improved service efficiency, reduced manual processing, stronger auditability, better management information, and improved citizen or customer experience.