



Real Systems Service Definition

1. Real Systems at Homeless Link and Salesforce

Real Systems is a Salesforce Consultancy & Implementation Partner, offering cloud-based Salesforce solutions for non-profits and public sector organisations looking for a secure, bespoke, and scalable system to support their digital transformation and maximise their impact.

We tailor to the unique needs of charities, housing associations, and Local Authorities. We design and build systems that scale with your organisation from program management, supporting fundraising and donor engagement to managing multi-agency service delivery and accommodation pathways.

The Local Authorities and Charities include for example:

Brighton & Hove City Council

Oxford City Council

Manchester City Council

GMCA (Greater Manchester Combined Authority)

St Mungo's

Shelter

Great Places

We specialise in delivering **multi-Agency** systems for Local Authorities. Our solutions leverage **Salesforce Experience Cloud** to provide a secure, unified portal where external commissioned providers record activity directly into a centralised system.

To maintain the highest standards of Data Protection, we implement a **'Zero-Trust'** architecture using sophisticated Sharing Rules, Permission Set Groups, and Organisation-Wide Defaults (OWD). This ensures strict adherence to **'Need to Know'** protocols, where providers are programmatically restricted to their own caseloads, while the Local Authority maintains a real-time, aggregate view. This eliminates data silos, ensures a Single Source of Truth for strategic commissioning, and automates the collection of performance metrics for statutory reporting.

We support Multi-Factor Authentication (MFA) and Single Sign-On (SSO) for all provider users, ensuring that access to the multi-agency system is as secure as the Local Authority's internal network

Real Systems has extensive experience of building and managing systems

With over 15 years of experience of building systems across the UK to meet the needs of customers. Established in 2014 we have developed and manage systems for over 14 Local Authorities and 30 charities

Real Systems build on the Salesforce.com platform

Salesforce is used worldwide by thousands of companies in the commercial and not for profit sectors and has hundreds of applications on its App Exchange which can be installed to work with the commission system. Examples which we have used include texting, Document Generation, marketing and external referral/enquiry forms.

There are three free Salesforce releases each year keeping the systems up to date. These are installed in under 5 minutes, usually overnight and at weekends.

Real Systems are Salesforce partners

We are registered Salesforce Consulting Partners and work closely with Salesforce staff.

Real Systems have experienced and a highly skilled Salesforce team and as part of the Homeless Link organisation, which employs 35+ full-time Salesforce professionals supplemented by freelance contractors and sub-contracting relationships with other registered Salesforce partners for development and support work.

We provide high quality support for our clients during and after implementation

We provide a full implementation service for clients, from system design to support. Our experienced consultants work with clients to design and specify the system and plan the implementation. Based on the requirements of the client, we would customise the application i.e. build additional objects, fields, workflows, validation, reports and dashboards. During this phase we consider the requirements, organisational/ service processes, reporting requirements, outcome frameworks. If required, we would scope out, specify and implement integrations with other business solutions. After UAT, training and data migration the customer's system is ready for use by staff. We then provide ongoing technical support via our helpdesk and make any ongoing changes that are needed, as part of an annual SLA with the customer. This includes system updates, security updates, user support etc. The customer will have Project Lead appointed from the start of the design and build stage, all the way through to deployment. Post deployment along with the dedicated helpdesk support with Salesforce Admins, we provide support via a Customer Success Lead.

Real Systems provide an implementation plan to successfully roll-out projects

Our consultant is appointed as project lead, supported by the Real Systems Manager.

The consultant customises and configures the Salesforce instance and work with the Real Systems team remotely to:

- produce and update project and communications plans, working with other suppliers if required
(e.g. of applications, solutions requiring integration) to agree on milestones and targets and schedule in technical resources
- gather information required for customisation which includes holding requirements gathering workshops with the customer
- schedule meetings involving suppliers, service managers and other stakeholders
- work with suppliers and developers to specify and deliver integrations
- produce functional design specifications, training materials and UAT scripts
- arrange calls/meetings to review progress and plan next steps
- maintain issue logs. For activities not running to schedule, produce exception reports with action plans and revised schedules
- develop and deliver UAT processes
- schedule time for further customisation and development based on user feedback, and 3rd party apps and integrations
- plan phased data migration to minimise service disruption
- plan and deliver training
- manage roll-out to other services to budget and schedule

Real Systems Training

We plan and deliver tailored training for each customer's system as agreed by role/team remotely, or in-person as required. This also includes reports and dashboards training.

Including providing training documents and video guides that are updated. Along with Q&A sessions as part of hyper support. As part of the post support included in the SLA is scheduled new user training.

Homeless Link is a well-established and successful charity

Real Systems is provided by Homeless Link which is the national membership charity for homelessness services in England (www.homeless.org.uk). We represent over 900+ organisations on the frontline of homelessness and supported housing in England – campaigning on their behalf and working to help improve the support they offer. We provide a wide range of services to our members including In-Form (leading Case Management solution), campaigning, research, training, events, consultancy and advice. We have a turnover of £11 million and 100+ staff.

Contracts and service agreements with Salesforce and Homeless Link

Our clients have a contract with Salesforce to cover the licences and data security services they provide and a separate contract with Real Systems at Homeless Link which covers the support services we provide for the ongoing system maintenance. Template contract and service level agreement documents available on request.

The minimum contract term is for one year. Thereafter, buyers can terminate their Real Systems contract by giving 45 days' notice in writing.

2. Technical System Features

Real Systems offer bespoke system built to specifications

Real Systems build customer systems based on the organisations requirements, using the Salesforce cloud that would be most suitable to meet the business needs e.g. Service, Experience, Public Sector, Health, Education or Nonprofit Clouds. The Salesforce Clouds come with standard features and functionality that can be configured, alongside this we create custom Objects and components enabling:

- Recording accounts/contact records with demographic information
- Risk Alerts
- Safeguarding/Safety Plans
- Case Management
- Assessments / Dynamic forms
- History
- Goals/Outcomes (Accommodation stays)
- Programs / Events / Sessions
- Campaigns
- Addresses
- Street contacts – Outreach service (Google Maps)
- Tasks / Automated reminders
- Document generation /templates
- Income/Benefits
- Reports & Dashboards

App Integrations

If required, to extend the system's capability without compromising security, we utilise Salesforce Native Applications sourced from the **AppExchange**.

Native Architecture: Unlike 'integrated' apps that send data to external third-party servers, our chosen native apps are built 100% on the Salesforce Lightning Platform. This ensures that sensitive client data always remains within the buyer's secure UK-based Salesforce instance, adhering to UK GDPR and NCSC Cloud Security Principles.

Vetted Trust: Every application passes the Salesforce Security Review before listing. By staying 'Native,' the solution inherits the Local Authority's existing security posture, including MFA, IP-restricted login ranges, and encryption, eliminating the need for separate security vetting of external hosting environments.

If required, we can also integrate Third Party Apps that are approved by the Buyer

Reports & Dashboards

- Users can build and customise their own reports (depending on access type) or view and run reports
- Reports and dashboards can be scheduled to be sent to staff
- Reports can be exported into Excel and .csv.
- Training and resources on building and customising reports is provided
- Desktop 'Dashboard' charts and graphs on the user's home page will show live key performance data at a glance.
- A bespoke suite of reports will be built by Real Systems as specified by the client.
- Access to reports, dashboards and folders is controlled by user permissions.

High levels of performance, security, backup and disaster recovery

- We will provide 99.98% service availability during and out of service hours. Any periods of unavailability will be recorded and reported on during scheduled review meetings. This information will be available from Salesforce Trust which provides up to date information on server availability, disruption, performance degradation and maintenance.
- <https://status.salesforce.com>
- Homeless Link's business continuity arrangements can be made available on request. Through Real Systems, Homeless Link is offering software as a service. Salesforce.com manages the system's servers and disaster recovery processes to state of the art standards and complies with all required legislation. <https://compliance.salesforce.com/en>

- Homeless Link can provide a backup app called Spanning.com for your system to backup all data each day. This means that in the event of accidental or intentional data loss, users can restore data and metadata to their system from any point in time.
- System administrators will also run a full weekly Salesforce back up from the system and provide it to download it for local storage.
- Data is stored and backed up within the UK.
- Real Systems uses the Salesforce security model to govern all access to data.
- As we are dealing with sensitive personal data, we follow the legal requirements of the General Data Protection Regulations.
- Salesforce as a platform is GDPR compliant
- <https://www.salesforce.com/gdpr/overview/> and the system we build for you allows you to be GDPR compliant, following your data processes. As a charity dedicated to promoting the best interests of our beneficiaries we take this very seriously, by promoting and following best practice in this area.
- Complex profile-based permissions, security settings and data sharing rules can be set up. Real Systems to ensure that staff only have access to data they have permission to see.
- Homeless Link has Cyber Essentials Plus certification, renewed annually.

Systems built to be flexible and scalable

Requirements within an organisation can be complex, where some may offer several different services. Each service type may have unique requirements, and we can utilise Salesforce customisation tools to design data entry screens, data-sharing rules, validation rules, processes and workflows to meet almost any requirements.

Real Systems design and build the systems to be scalable, with the ability to add any number of additional users to the system and customise the system when required to meet the needs of new services and contracts at any time.

Each user will have their own licence. Licences can be deactivated if no longer required and made available to other users. Additional licences bought during a financial year are charged on a pro rata basis up to the Salesforce contract renewal date.

The systems are accessible via desktop, tablet and mobile devices.

3. For more information

For more information on Salesforce: www.salesforce.com/uk/

For information on performance, security and compliance: <https://trust.salesforce.com/en/>

For more information on Real Systems: www.realsystems.org.uk

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