

About in-form

by Homeless Link



Version 11.0
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In-Form Service Definition

1 In-Form, Homeless Link and Salesforce

In-Form is widely used by organisations in the not for profit sector across the UK

In-Form is Homeless Link's highly successful case management application built on the Salesforce platform. (www.in-form.org.uk). It is a web-based system built on the Salesforce.com platform. It can be customised to record any type of work for any service providing support for clients and is used daily by over 24,000 people in more than 350 organisations across the United Kingdom and Ireland.

These include organisations with a wide variety of services across a large geographical area, for example:

- St Mungo's
- Framework HA
- Single Homeless Project
- Family Action
- The Wallich (Wales)
- Riverside
- Centrepont
- Porchlight
- Refugee Council (England, Scotland and Wales)
- Connection at St Martin's
- Thames Reach
- Sanctuary HA

Homeless Link has extensive experience of providing case management systems

We initially developed In-Form in 2009 to help our members record and report on their work with homeless clients and improve their practice. Before In-Form, between 1999 and 2009 we developed and managed a web-based client recording system called Link which was used by 25 charities and housing associations.

In-Form is built on the [Salesforce.com](https://www.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 within



or alongside the In-Form application. Examples which we have used include texting, electronic signature, HR, fundraising, document generation, marketing and external referral/enquiry forms.

Homeless Link built In-Form on the Salesforce platform in 2009. It is a technically mature product with a wide range of functionality which we have developed to make extensive use of Salesforce technology and to reflect the feedback we have received from our users over the last 15+ years.

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

Homeless Link are Salesforce partners

We are registered Salesforce ISV partners and work closely with Salesforce staff. The In-Form application is published on the Salesforce App Exchange and has been through rigorous Salesforce security review. Homeless Link is also a registered Salesforce Consulting Partner.

Homeless Link has a large, experienced and highly skilled Salesforce team

Homeless Link employs 40+ full-time Salesforce professionals on its In-Form team, supported by partnerships with other registered Salesforce partners for applications and development work.

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

Cara at Developing Health & Independence said:

“ I wanted to pass on our feedback that your helpdesk have been amazing. We're really impressed by the service and their responsiveness – it really stands out compared to some of the other software providers we all deal with. ”

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. In a typical implementation, the In-Form team would spin up a Salesforce system with the latest version of the In-Form package installed. 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 case management requirements, organisational/ service processes, reporting requirements, outcome frameworks. If required, we would scope out, specify and implement integrations with other business solutions. After testing, 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, e.g. when new projects or forms are required.

Our clients have a named In-Form Consultant working with them during implementation. Post-implementation, an office hours support desk is available from Homeless Link. Clients can also have members of staff trained as System Administrators to manage their In-Form system. Homeless Link can also provide system reviews and consultancy services at any time. We also send regular update emails, run webinars and other training activities, an annual conference and two user group meetings each year to keep customers in touch with In-Form and Salesforce developments, provide access to training and give them opportunities to network with other users.

In-Form has a tried and tested implementation plan which has been successful on 300+ projects

In-Form Consultant appointed as project lead, supported by Head of In-Form technical team.

In-Form Consultant customises the client's In-Form instance and work with leads from their office, remotely or on-site 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 of In-Form for pilot and roll-out projects (checklist provided)
- 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 where required for
In-Form functionality, applications and integrations
- 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 on In-Form, 3rd party apps and integrations
- plan phased data migration to minimise service disruption
- plan and deliver training
- gather and incorporate pilot feedback
- manage phased roll-out to other services to budget and schedule



Homeless Link provides flexible training options

Cork Simon Community said:

“First off, thank you for your time and expertise last week. Everyone was very impressed with the quality of the training, with your comprehensive knowledge of the system and with the speed that some of the changes were made. Everyone had nothing but positive feedback, which I can assure you is most unusual for this group! The quality of the training provided – and your professionalism (and patience!), were significant factors in getting buy-in to adopting In-Form. So, thank you.”

Salesforce and the In-Form application are designed to be easy to use without training by users with a wide range of technical skills. However, Homeless Link can provide a flexible package of on-site and online end user, reporting and system administration training to meet the client's requirements during and post implementation.

Homeless Link's technical support, training and resources are supplemented by a comprehensive range of online resources provided by Salesforce including multiple online communities and the Trailhead e-learning platform - <https://trailhead.salesforce.com/en/home>

Homeless Link is a well-established and successful charity

In-Form is provided by Homeless Link which is the national membership charity for homelessness services in England (www.homeless.org.uk). We represent over 800+ 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, campaigning, research, training, events, consultancy and advice. We have a turnover of £12 million and 100+ staff.

2 In-Form technical features

In-Form has a wide range of client support features as standard

The core of the application is the client record. This records basic demographic information about the client, and is used to connect the client to the various services that they receive, as well as to link to actions, needs assessments, risk assessments, support plans, outcomes stars, goals and tasks completed. All client documents can be attached to the core client record.

In-Form includes the following features as standard:

- Client demographic/contact information
- Client alerts
- Actions/casework recording
- Outcomes
- Needs assessment
- Drug and alcohol consumption
- Risk assessment/risk management plans
- Timelines (to record client engagement with services)
- Income and sanctions
- Client alerts, eg if client is assessed as high risk
- Sessions (to record client attendance at group activities, events, training, drop-ins etc)
- Agencies and agency contacts
- Friends and family members
- Complaints, compliments, incidents and accidents
- Community sentences
- Address histories
- Homelessness Outcomes Star and any other Triangle outcomes stars
- Goals
- Pets
- Voter registration
- Report builder with 200+ reports and a wide range of dashboards and views
- Chatter - internal communication and document management tool
- Project records
- Facility to add photos to client, staff and room records
- Ability to attach notes and documents to records
- Review and task reminders

- Approval processes.
- List views of key data, eg current caseload, clients without a recent risk assessment, waiting lists
- Document generation
- Occupancy and void recording

We keep the In-Form application up to date to reflect current sector practices, for example strength/asset-based approaches, trauma informed care and Housing First.

We can remove any features that are not needed and other custom forms, screens and processes can be built based on information provided by the client during the implementation process.

Housing Management can also be integrated seamlessly with your client and project records.

In-Form Housing Functionality

This is fully integrated with all aspects of the In-Form product, including client records, risk management, safeguarding, incidents, support Planning, client assessments, complaints and accidents. In-Form Housing includes the following features:

Locations and assets:

- Buildings, Flats, Rooms and Spaces, Assets and Asset Associations

Occupancy and rent recording:

- Units
- Occupancies, agreements and extensions
- Void tracking including reason and status
- Up to seven charge streams tailored to your needs, such as Housing Benefit, resident contributions, Social Services, service charges, etc.
- Transactions and payments, such as rent payments, miscellaneous charges, deposits and sundries
- Rent charges generated automatically, on either a weekly or weekly pro rata basis
- Ability to change the charge amounts per stream (i.e. if a Client's Housing Benefit contributions change)
- Bulk import payments/ export of charges from CSV and Excel
- Bulk import changes to the charge amounts per stream
- Customisable arrears tracking and business processes

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- Rent statements and arrears letters
 - VAT information records
 - Nights

Repairs and maintenance:

- Property checks
- Work orders, work order tasks and work order assignment directory
- Maintenance issues

Compliance

- Compliance requirements, results and status
- Unit compliance

Tenant Satisfaction Measures (TSMs)

- Tenant Satisfaction Measures surveys
- Tenant Satisfaction Measures suite of reports and dashboards

MyIn-Form

- MyDetails – allows clients to see personal data saved about them
- MyRepairs – allows clients to raise and track maintenance requests at their home

In-Form has a powerful Report Builder

- Staff can build and customise their own 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 are available from Homeless Link, Salesforce and other providers.
- Desktop 'Dashboard' charts and graphs on the user's home page will show live key performance data at a glance.
- In-Form includes a standard set of 200+ reports
- A bespoke suite of reports will be built by Homeless Link as specified by the client.
- Access to reports, dashboards and folders is controlled by user permissions.

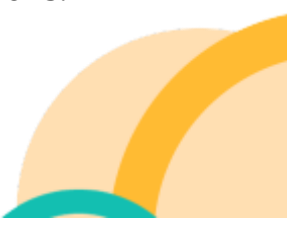
In-Form can be integrated with other IT systems

Salesforce has APIs which facilitate integration with other IT systems and applications.

Page **8** of **14**

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In-Form has the highest levels of performance, security, backup and disaster recovery

In-Form 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 In-Form, 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 installs a backup app called Spanning.com on all its In-Form systems 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 In-Form system from any point in time.

System administrators can also run a full weekly Salesforce back up from their In-Form system and download it for local storage.

Data is stored and backed up within the UK.

In-Form 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 In-Form application 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 on In-Form to ensure that staff only have access to data they have permission to see.

Homeless Link has Cyber Essentials Plus certification, renewed annually.



In-Form is flexible and scalable

Requirements within an organisation can be complex, with some In-Form users offering over 100 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.

In-Form is also 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. There is little limit to the level of customisation that can be carried out on In-Form Enterprise.

Each In-Form 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.

Other Salesforce applications can be installed on In-Form

Salesforce has thousands of applications on its App Exchange <https://appexchange.salesforce.com> which can be installed to work within or alongside the In-Form application. Examples which we and our clients have used include texting, electronic signature, document generation, and external online referral/enquiry forms.

In-Form can be used on mobiles and tablets

The system is fully accessible with an up to date internet browser or via tablet or Smartphone application. Mobile users just need to download the Salesforce mobile application. Further mobile application configuration is also available.

Client and other data from existing systems can be uploaded into In-Form

We have extensive experience of uploading data from existing client data sets in spreadsheets, Access and other databases.



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 In-Form: www.in-form.org.uk

Contacts

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4 What our customers say about In-Form

Step by Step, Aldershot

“ Thank you all for everything, from pre-build right up to the support and tweaks now. We LOVE In-Form – I could go on for days about how it has helped us evolve and improve, so thank you all.

Step by Step supports young people aged between 11 and 25 through delivery of accommodation, training, counselling and development services. We needed a new system after a period of growth and wanted to be able to manage data more effectively to demonstrate impact and performance. We chose a web-based system so that our mobile workers could access it and it meant that it could grow along with our organisation with little effort invested on our part. For us, In-Form fully meets client engagement, support, progression and reporting data requirements.

We have had a very positive experience working with the In-Form team and have received excellent support from Nick (for functionality) and Jane (for contracts and governance). We found that roll out and implementation went well with access to prototype systems prior to Go Live being especially useful... We particularly liked the intuitiveness of the system and the ease with which a number of staff took it to who we felt may have struggled.

We have had very positive feedback from staff and In-Form has greatly improved information sharing. ”

YMCA Birmingham

“ Having done quite a few implementations over the years In-Form is probably the best all-round package. Great support, good value for money, and includes everything you'd need for support planning, housing management, maintenance and rents/service charges. ”



Other feedback

“ In-Form implementation was professional, helpful, informative, direct, quick turnaround, simplified, great experience! ”

“ It gives instant access to impact and performance information. ”

“ Being able to break the data down and report back to staff really helped them understand the bigger picture and see the impact of work being done and why the information is useful. ”

The best financial decision we made as it helps us so much with funding, grants and measuring our impact.

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in-form.org.uk