



Service Definition Document

Technology Consultancy, Implementation and Support



Crown
Commercial
Service

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About Us

MTX offers consultancy, system design, implementation, support, and training for Salesforce Clouds. Our services empower public sector organisations to enhance productivity, optimise real-time data management, provide impactful user experiences, and transform business outcomes. We operate across the following key areas:

Benefit of Working with MTX

We can significantly speed up the implementation process, thanks to our expertise and experience. We understand how to customise Salesforce Clouds according to your specific organisational needs and workflows, ensuring you get the most out of your investment quickly and effectively. By providing strategic guidance, troubleshooting, and support, we help minimise disruptions during the transition, allowing for a smoother and more efficient onboarding of Salesforce solutions in your organisation.

Key Service Features

Consultancy and Strategy - Advising on the best practices and strategies to align Salesforce capabilities with organisational objectives.

Customisation and Configuration - Tailoring the Salesforce platform to meet specific organisational needs through custom fields, page layouts, workflows, and more.

Integration Services - Connecting Salesforce with other technology systems and third-party applications to create a unified and efficient ecosystem.

Data Migration – Assisting with the transfer of existing data into Salesforce from other CRM systems or databases, ensuring data integrity and accuracy.

Implementation and Deployment – Setting up and rolling out Salesforce solutions within an organisation, including configuring the platform according to the defined operational processes.

User Training and Support – Providing training sessions for employees to effectively use Salesforce, as well as ongoing support and maintenance services.

Development of Custom Apps – Developing bespoke applications using Salesforce's platform capabilities to address specific operational challenges.

Performance Optimisation – Analysing and enhancing the Salesforce environment to improve performance and user experience.

Security Implementation – Ensuring that the Salesforce setup adheres to security best practices, protecting sensitive data and maintaining compliance with regulations.

Change Management – Supporting organisations in managing the change process associated with the deployment of new technologies like Salesforce.

Reporting and Analytics – Creating custom reports and dashboards to help organisations track performance and make data-driven decisions.

Ongoing Management and Updates – Providing regular updates, patches, and new features to keep the Salesforce environment up-to-date and running smoothly.

Service Terms

1. Overview of Services

MTX offers comprehensive Salesforce implementation services tailored to enhance business efficiency and streamline workflow processes for our clients. Our services encompass the initial setup, customization, and ongoing support of Salesforce solutions, enabling organisations to maximise their investment in the Salesforce platform.

2. Data Management

2.1 Data Backup and Restore

MTX provides robust data backup and restore services ensuring business continuity. We implement Salesforce's data backup policies, which include daily backups and the ability to recover specific data at any time. These backups are encrypted and stored in multiple, geographically dispersed data centres.

2.2 Disaster Recovery

Our disaster recovery strategy is built on Salesforce's robust infrastructure, designed to maintain functionality and data integrity under various scenarios, including natural disasters and cyber-attacks. Salesforce maintains a high resilience through mirrored data centres, allowing rapid failover and minimal downtime. MTX enhances these capabilities with custom recovery solutions tailored to client-specific requirements.

3. Onboarding and Offboarding Support

3.1 Onboarding

We facilitate a smooth transition for our clients onto the Salesforce platform, providing comprehensive training, initial system setup, and data migration support. Our aim is to ensure that your team is fully equipped and confident in using Salesforce from day one.

3.2 Offboarding

Upon service termination, MTX ensures a seamless offboarding process. We provide data extraction services and assist in transitioning your operations away from Salesforce, if required, ensuring that all your data is returned to you in a secure and usable format.

4. Service Constraints

Maintenance windows are scheduled during off-peak hours to minimise disruption. Customization levels are guided by the inherent capabilities of the Salesforce platform and adherence to best practices to ensure system stability and integrity.

5. Service Levels

MTX commits to high service levels with guaranteed system performance and availability. Support is available 24/7, with dedicated teams to address and resolve issues promptly, in alignment with Salesforce's SLA standards.

6. After Sales Support

Our after-sales support includes regular system health checks, updates, and user support provided by our expert team. We are committed to ensuring your Salesforce implementation continues to meet your evolving business needs.

7. Technical Requirements

Clients are required to ensure that their IT infrastructure complies with the technical specifications provided by Salesforce. MTX will assist in evaluating existing systems to identify necessary upgrades or modifications.

8. Outage and Maintenance Management

We proactively manage and communicate about outages and maintenance. Clients are notified in advance through our preferred channels about scheduled maintenance or unexpected issues, consistent with Salesforce's operational transparency.

9. Hosting Options and Locations

MTX offers flexible hosting solutions, either on-premises or cloud-based, depending on your business requirements and compliance needs. Our data centres are located in strategically secure locations across the UK to ensure optimal access and data sovereignty, complementing Salesforce's global hosting infrastructure.

10. Access to Data Upon Exit

Clients have guaranteed access to all their data upon the termination of services. We provide detailed processes and support for data retrieval to ensure that your data remains your property, independent of the service.

11. Security

Security is paramount at MTX. We implement Salesforce's comprehensive security protocols, which include robust encryption, regular security audits, and compliance with international data protection regulations. Our security measures are regularly updated to tackle emerging threats, ensuring your data's safety.

This document integrates specific details from Salesforce's platform security and disaster recovery plans, ensuring that MTX clients are well-informed about the resilience and security of their Salesforce solutions