

Insight Direct (UK) Ltd

Salesforce Lightning Agentforce Sales (formerly Lightning Sales Cloud)

- Cloud Software - Digital Marketplace - Lot 2b
- G-Cloud 15



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Salesforce Lightning Agentforce Sales

1. Service Description

1.1. Service Overview

Salesforce Lightning Sales Cloud [Former name] is now [Lightning Agentforce Sales]. You may continue to see the former name in our application and documentation. This isn't the same old sales force automation software. Lightning Agentforce Sales defines the era of limitless selling. Shatter the capacity wall by deploying AI agents and trusted data to accelerate every deal and grow revenue faster. Salesforce Lightning Agentforce Sales supports Government's drive for revenue generation and comprehensive stakeholder management. Get a complete sales solution from pipeline to payment, on one integrated and trusted platform. AI agents engage leads, automate busywork, and drive operational efficiency, empowering your sellers to focus on what they do best. Powerful CRM capability allows you to track relationships, manage activities and assign tasks to other team members. Empower teams with 360° data from any source and trusted AI for sellers, leaders, ops, and even partners. Engage buyers effectively, improve seller productivity, close deals faster, and grow revenue on the most complete sales platform. From internal stakeholder management to grant and opportunity management, our extensive reporting provides the transparency and metrics to enable success.

Sell more. Grow faster. Close anywhere.

From small to large organisations looking to drive revenue, we have solutions to help sales personnel everywhere increase pipeline generation, reduce sales cycles, and improve win rates.

With Agentforce Sales users get one central place to manage all activities. That means they'll spend less time on administration and more time being productive. For managers, Agentforce Sales gives real-time visibility into their teams' activities, so planning activity with confidence is easy.

Best of all, Agentforce Sales is easy to use and customisable to the way you work. And, because it's all in the cloud, everyone can access the Agentforce Sales with just an Internet connection — there's no need for expensive hardware or software. With Agentforce Sales, you can simply add more seats or upgrade to another edition that has more features when your business grows. There's no disruption to your business because we take care of everything behind the scenes.

Built on the Salesforce Platform, Agentforce Sales connects the next generation of apps, devices, users and stakeholders. It's an instant connection to your leads, contacts, accounts, and critical business information. It's everything you need to close deals quickly. Wherever you are. Whenever you want. On any device.

Boost Productivity

Now everyone can take care of business. Anywhere, anytime, on any device.

Work As A Team

Easily collaborate across teams. Connect your team and your data on one platform, from any device, so everyone knows what's going on in an engagement at any given time.

Manage Your Stakeholders

Keep a single shared stakeholder profile, organisation-wide. Know you're looking at the same up-to-date contact as service and marketing.

Real-time Visibility

Track and exceed your sales targets with real-time dashboards. View your performance anywhere, on any device.

Close more deals using trusted Artificial Intelligence

Agentforce AI analyses your CRM data to learn what separates deals won from deals lost. Get opportunity Insights: customer sentiment, competitor involvement, and overall prospect engagement and account Insights: including M&A activity and company expansion updates. Save serious time with AI driven automated Activity Capture by connecting your email and calendar to Salesforce: all relevant emails and meetings attach to the right Salesforce record, adding to everyone's productivity by eliminating data entry.

Unleash productivity with the #1 agentic platform for sales

Agentforce Sales powers your entire sales process, bringing AI agents and human reps together at every step to unlock your team's full potential. With AI-powered automation eliminating manual work and freeing up valuable time, reps are free to focus on higher-value relationships and deals, driving greater productivity and revenue.

Multiply your impact with AI agents.

Deploy AI agents 24/7 to autonomously handle repetitive tasks, expand your pipeline, and boost revenue without adding headcount.

Give human sellers the ultimate winning edge.

Equip reps with real-time data and AI-powered insights so they can cut through the noise, deliver better buying experiences, and close more deals, faster.

Automate sales tasks, accelerate decisions, and guide sellers to close faster. Easily customise and integrate AI everywhere you work with Agentforce Sales.

Agentforce Sales editions for every need

The success of our customers continues to be our guiding focus. We are committed to helping our customers leverage the power of the cloud to connect with their end users in entirely new ways. With our latest editions, we are including more customisation and configuration capabilities and key features that have previously been sold separately, making it even easier to buy Salesforce.

The features available within each edition are summarised here:

<https://www.salesforce.com/uk/products/sales-cloud/pricing/>*.

* Please note the commercially available pricing shown for each edition on this page is superseded by the preferential UK public sector specific rates in this Digital Marketplace service listing.

An Agentforce Sales edition comparison chart is available here:

https://secure.sfdcstatic.com/uk/assets/pdf/datasheets/DS_SalesCloud_EdCompare.pdf

The different Editions are available at simplified price points, each with even more capabilities to help your organisation succeed.

Professional Edition

A complete CRM suite with tools for marketing sales and commerce, providing lead, contact and account management, forecast management, quoting and contracting and customisable reports and dashboards for real time insights. Manage your entire sales cycle with Professional edition.

*** Enterprise Edition**

Deeply Customisable sales CRM for your organisation, offering more flexibility and web API for easy integration. Includes advanced pipeline management, deal insights, conversational intelligence and Agentforce AI features.

Unlimited Edition

The CRM for sales with intelligent automation and developer support built in. Unlimited edition adds predictive AI capabilities, conversational intelligence and sales engagement. Unlimited edition comes complete with Premier Success, including unlimited training and a full sandbox hierarchy for development and testing.

Agentforce 1 Edition

The complete Sales CRM with built-in AI and unified data. One platform that does it all. Includes our full suite of AI with unlimited Agentforce usage for employees. Salesforce Spiff, Sales Planning, Sales Programmes, Salesforce Maps, Tableau Next and Slack Enterprise. Comes with an annual allowance of Flex and Data Cloud credits to help you create the ideal customer experience.

* Enterprise Edition is our most popular edition.

1.2. Service Features

1. Comprehensive CRM offering from the worlds no1 SaaS company
2. Trusted Agentforce AI agents grounded in your CRM data
3. Activity, task, call and email management tracking all interactions
4. Lead generation, opportunities, territories, forecasting, contract, product and campaign management
5. Social Collaboration, omni-channel engagement, Mobile, Knowledge base, Analytics, Agentic AI
6. Powerful, flexible reporting and dashboards for real-time operational insights
7. No-code & Low-code declarative configuration, Open API integration, Training included.
8. Point and Click development, tailoring to your specific processes
9. Easily extendable using the Salesforce AppExchange

Please refer to the Main Components and Functions section below for more information.

1.3. Service Benefits

1. Close deals faster with guided selling and AI-powered deal insights
2. Provide mobility to stakeholder relationship owners across the organisation
3. Save time by assigning and tracking tasks within the application
4. Better visibility - 360 degree view of contacts through all channels
5. Increased adoption from easy-to-use UI
6. Integrate with back office using free, open APIs
7. Scale easily with automated sales processes and workflows
8. AI Agents automate tasks, enhance productivity, personalize interactions, increase revenue
9. Predict future sales with visibility into pipeline and forecasts
10. Enable GDPR, WCAG Accessibility and CE+ compliance

1.4. Main components & Functions of this service

Salesforce operates on a Deeply Unified Platform, integrating across the entire product suite, architecture, and a single code base. This unified approach ensures that all experiences, applications, and platform capabilities are delivered as a single, cohesive capability to end users. Despite being highly integrated, the platform remains open, allowing connections to any part of the enterprise. This openness, extensibility, flexibility, and customisability enable organizations to interact with any part of their enterprise in any way they need.

Experience the powerful features of Agentforce Sales to learn faster and perform better. Free your sellers to focus on building customer trust and closing deals. AI agents act as productivity multipliers at every step of the sales cycle. Please review

<https://www.salesforce.com/uk/sales/cloud/> for further information about how the features of our CRM can support and transform your department, agency or teams. Some aspects of these features are also summarised below.

ACTIVITY MANAGEMENT

Automatically capture emails, events and other types of engagement activities directly in CRM. Manage activity data associated with the relevant leads, contacts, accounts and opportunities in one spot, creating a single source of truth. Get visibility into selling activities at scale with out-of-the-box reporting to make it easy to focus on what matters most.

LEAD MANAGEMENT

Connect with customers and track deals across every channel. Use AI to prioritise the best leads based on the customer profiles that drive the most revenue. Increase rep efficiency with actionable, prioritised to-do lists right in Salesforce.

ACCOUNT AND OPPORTUNITY MANAGEMENT

Move deals forward faster with specific guidance for sellers throughout the sales process. Get deal-specific insights, build account plans and easily unify opportunity and account data for a single customer profile — whether you're working directly in your CRM or on the go.

SALES COLLABORATION

Tap into the wisdom of your employee social network. Get the resources you need to progress more engagements, faster. Find experts, access detailed information, and track tasks wherever you are - make virtual your new normal.

PARTNER MANAGEMENT

Build and empower your partner network with Partner Community Experiences. Connect directly with channel partners to share goals, objectives, and activities in a secure, branded location.

MOBILE

The Salesforce Mobile App turns your mobile device into a portable sales office. You can log calls, respond to hot leads, work opportunities, or check dashboards no matter where you are.

FORECAST MANAGEMENT

Build accurate forecasts in real time to drive predictable growth. Tailor metrics to align with business goals. Drive accountability and keep everyone on track with a shared understanding of top deals and forecast trends.

PIPELINE MANAGEMENT

Maintain and manage pipeline in a single, consolidated view. Track changes over time with built-in charts. Focus on the most important deals with the help of AI and use deal insights to provide proactive coaching.

REVENUE INTELLIGENCE

Power predictable revenue by measuring pipeline accuracy in real time and optimising the complete revenue lifecycle. Chief revenue officers will have access to updated revenue optimisation features including Pipeline Inspection, flexible forecasting, AI-based conversation insights and revenue analytics templates — all built directly into Agentforce Sales 360.

REPORTS AND DASHBOARDS

Use data to drive action with a suite of out-of-the-box reporting tools. Easily visualise metrics with dashboards and quickly drill into the key drivers of sales performance. Track lead volume, activity conversion rates and sales pipeline with ease. Personalise reports and dashboards so every member of the sales team has the information they need to sell faster.

WORKFLOW AND PROCESS AUTOMATION

Drive seller efficiency by automating complex sales processes and workflows with drag and drop simplicity. Manage and maintain territory assignments to optimise account coverage and align with sales goals.

QUOTING AND CONTRACT APPROVALS

Close deals faster with standard and templated quotes synced to sales opportunities. Speed up the contract approval process with automated workflows directly within Salesforce.

CRM EVERYWHERE AND COLLABORATION

Access and update CRM from anywhere with the browser extension and mobile app. Collaborate across teams to quickly swarm on sales opportunities. Create mutual account plans and share knowledge, files and data to keep teams and stakeholders informed at every stage.

EMAIL INTEGRATION

Use the email applications you already know. No one needs to change the way they work, so everyone stays productive. Automatically capture emails, events, and other types of engagement activities directly in CRM.

FILES SYNC AND SHARE

Now it's easier to share files, discuss them, publish the best, and track your content in real time. Quickly find what you're looking for, share it securely, and even subscribe to receive alerts when something changes.

CONSOLE FOR GROWTH

Give inside teams an experience that matches how they work, and they'll work smarter, faster. Now users can see data intelligence, detailed company info, and multiple leads on a single screen, so they'll be productive faster.

BUILD YOUR LIMITLESS SALES TEAM WITH AGENTFORCE AI

Autonomously nurture inbound leads 24/7, coach every rep on every deal and generate quotes in an instant. Humans with agents drive sales success, together. Sell faster with trusted AI built directly into your CRM. Give every seller an AI assistant to supercharge selling throughout the sales cycle. Automate sales tasks, accelerate decisions, and guide sellers to close faster. Easily customise and integrate AI everywhere you work. Guide sellers to close deals, automate sales processes, and build stronger relationships with help from Agentforce. With AI-powered automation eliminating manual work and freeing up valuable time, reps are free to focus on higher-value relationships and deals, driving greater productivity and revenue.

2. Information Assurance

Salesforce holds a suitably scoped ISO:27001 certificate that covers the majority of its core services, please refer to the Salesforce Security, Privacy and Architecture (SPARC) documentation [here](#) for further product specific information. In addition, for country and product specific compliance please refer to this [link](#) for current status.

Salesforce.com EMEA Limited and its affiliates are committed to achieving and maintaining customer trust. Integral to this mission is providing a robust security and privacy program that carefully considers data protection matters.

In the UK Salesforce has completed an external CHECK Security assessment performed against its core services by a CREST member organisation, Salesforce also holds a current Cyber Essentials certificate, again completed by a CREST member organisation and can provide a response to the NCSC 14 security principles upon request.

In accordance with the EU Data Protection Directive and implementing national legislation, the Salesforce Processor BCR (Binding Corporate Rules) is intended to provide an adequate level of protection for Personal Data during international transfers within the Salesforce Group made on behalf of Customers and under their instructions, further information is available here

<https://secure.sfdcstatic.com/assets/pdf/misc/Salesforce-Processor-BCR.pdf>

Salesforce adheres to the principles of the EU-U.S. Privacy Shield framework with respect to personal data submitted by Salesforce's customers in reliance on the Privacy Shield to the following online services: Agentforce Sales, Service Cloud, Force.com, Communities, Chatter, Site.com, Database.com, Analytics Cloud, Financial Services Cloud, Health Cloud, Heroku, Pardot and Configure, Price, Quote (CPQ) <https://www.salesforce.com/assets/pdf/misc/privacy-shield-notice.pdf>

In addition, we currently hold the following certifications:

Geographical Recognition

- TRUSTe Certified Privacy Seal
- C5(ISAE3000)
- Spain ENS (High)
- IRAP
- Asip Santé HDS
- Cyber Essentials

Global Audit Compliance

- ISO 27001,27017, 27018, 9001, 42001
- SSAE 18/ISAE 3402
- SOC-1
- SOC-2
- PCI-DSS

Learn more here: [Salesforce Services Trust and Compliance Documentation](#)

Relating to the Government Security Classification (GSC) scheme and the National Cyber Security Centre (NCSC), Salesforce has various Public Sector customers, holding a variety of data at OFFICIAL and OFFICIAL-SENSITIVE levels. Further Salesforce has various documents to assist organisations assessing the Security posture of Salesforce such as a response to the NCSC 14 Security principles. Please contact us for up-to-date information and access to additional information.

Accessibility

- Core Accessibility Standard
 - Our organisation is deeply committed to providing accessible digital experiences for all users. We strive for conformance with the internationally recognised Web Content Accessibility Guidelines (WCAG) 2.2 Level AA standard across our enterprise. This commitment applies to all of our listed services.
- Product and Service Interface Accessibility

Service Interface: The accessibility standards for our core services are governed by the WCAG 2.2 Level AA guidelines. We utilise the accessibility standards set forth by Salesforce, which follows international best practices, including Section 508 of the U.S. Rehabilitation Act, and actively strives to meet WCAG 2.2 Level AA.

- Webchat Support: Our webchat products have been assessed against WCAG 2.2 standards. Details of this compliance are described in our Voluntary Product Accessibility Template (VPAT) statements (available at: https://www.salesforce.com/company/legal/508_accessibility/). While formal usability studies with assistive technology have not been conducted, the services have been robustly assessed against WCAG 2.2. Furthermore, existing customers have successfully conducted testing and are utilizing the Salesforce Webchat capability in live services.
- Support and Documentation Accessibility
 - User Support: We are committed to ensuring our user support channels (Email, Ticketing, and Webchat) are accessible for users working with assistive technology. We strive to ensure our support staff work with services that strive to meet WCAG 2.2 Level AA to ensure an effective support experience.
 - Documentation: All official documentation, including resources for onboarding and offboarding, strives to meet WCAG 2.2 Level AA to the extent possible.
- Maintenance and Review Methodology
 - Review Cycle: We maintain a formal process for reviewing our adherence to WCAG 2.2 AA standards across all products.
 - Continuous Improvement: We are committed to moving our accessibility review cycle from an annual basis to a six-month (semi-annual) schedule. This ensures that any bugs or regressions are identified and remediated promptly in alignment with every release.
 - Consistency: Our enterprise adheres strictly to WCAG 2.2 Level AA as the consistent standard for all accessibility compliance initiatives.

3. Data Backup / Restore and Disaster Recovery

Redundancy and Scalability

The Salesforce service is built for high availability across 3 availability zones within the region. Each availability zone includes the following:

- Multiple network carriers for customer connectivity
- Multiple ISPs for customer transit and internal replication
- Multiple dedicated connections for DR/BCP
- Redundant cloud-based networking infrastructure
- Web, Application, API, Cache, Search, Index, Query and Batch servers are load balanced and live within multiple availability zones within the region, with failover capabilities
- Database servers are replicated both within the same availability zone for performance reasons, and across 3 availability zones to ensure availability.

Extensive use of high-availability servers and network technologies, and a carrier-neutral network strategy, help to minimise the risk of single points of failure, and provide a highly resilient environment with maximum uptime and performance. The Salesforce Services are configured to be N+1 redundant at a minimum, where N is the number of components of a given type needed for the service to operate, and +1 is the redundancy. In many cases, Salesforce has more than one piece of redundant infrastructure for a given function.

Salesforce provides Enterprise class recoverability through replication of data across three distinct availability zones.

Disaster Recovery

Salesforce Hyperforce based cloud services has its compute resources run in 3 Availability Zone (AZ). Services run as containerized applications in containers which are configured for HA (high availability) by distributing nodes across AZs. To take advantage of this, service pods themselves are deployed across AZs when scheduled on nodes. Because of this when one AZ goes offline there will always be available service pods in different AZs to handle the workload. Service pods are also stateless so losing an AZ and nodes in that AZ along with the service pods running in them will cause no loss of data and new service pods will be scheduled on the available zones to handle the load.

Product-specific information is available in the Security, Privacy and Architecture (SPARC) documentation for the respective services available on our website (<https://www.salesforce.com/company/legal/trust-and-compliance-documentation/>), and customers can view detailed policy documentation at <https://compliance.salesforce.com/en/disaster-recovery-bcp>.

Backup

Salesforce is making backups of customer data, as outlined above, for the purposes of providing a resilient service for customers. These backups are not designed for customer use.

To help customers routinely back up their data, Salesforce offers several native options that are available for no additional cost to customers. Salesforce provides tools like Data Loader and the API as a method for customers to manually restore their data. It is important to note the order in which data is restored, so that relationships and the connection to related records can be preserved. Following the acquisition of Own, Salesforce can now offer more comprehensive backup options to customers based on integrating that functionality into their products, specifically the Backup and Restore option.

The following documentation and options are available to customers as a method of backing up their data:

- Data Export Service: Manual or scheduled exports of your data via the UI. Export Backup Data from Salesforce:
https://help.salesforce.com/s/articleView?id=xcloud.admin_exportdata.htm&type=5.
- Data Loader: Manual on-demand exports of your data via the API. Export Data:
https://help.salesforce.com/articleView?id=exporting_data.htm&type=5.

- Report Export: Manual on-demand exports of your data via reports. Export a Report: https://help.salesforce.com/articleView?id=reports_export.htm&type=5.
- Salesforce Backup and Restore product: <https://www.salesforce.com/platform/data-backup-recovery/>

Restore

Salesforce offers several native options at no additional cost to help customers routinely back up their data. Depending on your edition, your org can generate and export backup files on a weekly or monthly basis. Individual users can view and restore their deleted records from the Recycle Bin, where all deleted records reside for 15 days before being deleted from the system. Admins also have access to an org-wide Recycle Bin to restore or permanently delete records during the 15-day window. Salesforce also supports manual restore via Data Loader and API.

As an add-on solution, Salesforce Backup provides additional backup and restore capabilities. You can configure and maintain automatic backups, make a backup on demand, and quickly find and restore data. You can control the order in which data is restored to preserve relationships and connections to related records.

4. On-Boarding

4.1. Deployment

Salesforce is a SaaS (Software as a Service) solution and users access the tools via a web browser. Therefore, no software or hardware deployment is necessary. Implementation takes the form of assigning usernames and passwords to staff and (if needed) completing webinar-based training on the application.

4.2. Configuration and Customisation

Salesforce offers extensive configuration (point-and-click tools) and customisation (code-based development) options to tailor the platform to specific business needs.

Configuration Options (Point-and-Click)

Configuration involves using built-in features and settings within the Salesforce user interface, typically without writing code. Key options include:

- Data Model Adjustments: Creating custom objects, fields, and tabs to store unique business data. You can also define object relationships and validation rules for data integrity.
- User Interface (UI) Design:
 - Creating and modifying page layouts, compact layouts, and record types to control how information is displayed and organize different business processes.
 - Using the Lightning App Builder to create custom Home Pages and Record Pages with specific components and layouts.
 - Branding login and self-registration pages for Experience Cloud sites.
- Process Automation: Automating tasks and processes using declarative tools like Salesforce Flow and Approval Processes.

- Security & Access Controls: Managing user permissions, profiles, and role hierarchies to ensure appropriate data access and security.
- Reports & Dashboards: Building custom reports and dashboards for real-time data visualisation and analytics.
- Integrations: Installing pre-built apps and components from the Salesforce AppExchange.

Customisation Options (Code-Based)

Customisation involves using programmatic tools to add functionality that goes beyond the standard configuration options. Key options include:

- Apex Code: Writing custom logic, classes, and triggers that execute before or after specific events (e.g., record insertion or deletion).
- User Interface Development:
 - Building dynamic web applications and enhancing UIs with Lightning Web Components (LWC) and Visualforce pages.
 - Modifying the UI with CSS for specific styling requirements.
- Integration Development: Building complex, seamless integrations with third-party systems and external data sources using various APIs.

Custom Applications: Developing entirely new, purpose-built applications within the Salesforce platform tailored to exact business requirements.

5. Off-Boarding

Off-boarding from the service is as simple as exporting and downloading your data and metadata if you choose to do so. We provide your data in an industry standard readable format to make it as easy as possible for you to migrate to another service if you wish to do so.

For further details of data extraction and removal, please refer to section 5.2 below.

5.1. Termination

Details of termination options and implications are contained in our terms.

The Supplier would never terminate except for buyers' material breach of the Call-Off Contract and the terms.

5.2. Data Extraction and removal

With a commercial model that requires customer trust to be at the core of everything we do, Salesforce also helps ensure that our customers can exit our service with open and transparent processes and clearly defined commercial considerations. As such, should for any reason a customer wish to cease using the Salesforce service then outlined below are some of the key technical considerations for ending the subscription service and extracting both the customer's data and the technical investment made in the platform. Further detail relating to an exit strategy can also be discussed on understanding the nature of any potential solution

- Salesforce offers a Weekly/monthly Export Service (WES) for those customers requiring a local backup copy of their data, or in order to exit the service.

- Data is exported into a set of comma-separated values (CSV) files. Images, documents and attachments can also be exported.
- Within thirty days of termination of your contract with us, upon request, we will make your data available to you for export or download. Thirty days after termination of your agreement we will have no obligation to maintain or provide your data, and will thereafter delete or destroy all copies of your data in our systems or otherwise in our possession or control unless we are legally prohibited to do so.
- Data export is provided at no additional charge. Full details are contained in our terms.

Salesforce understands the intentions of G-Cloud, and is keen to support customers' adoption of cloud technology, however that should also include knowing how to leave a given cloud technology. Salesforce has an exit strategy paper that can be used to help plan a path away from Salesforce. Notwithstanding that Salesforce has one of the lowest attrition rates in the industry, we remain committed to your success. Continued investment is how we sustain 3 upgrades every year and a constant delivery of new innovation in every update.

6. Pricing Summary

Comprehensive pricing details can be found in our separate pricing document.

The service has various pricing levels and bandings based on type of service required and the volume needed. Please refer to pricing documents for detailed pricing.

7. Service Constraints

Here are some key considerations we wish to highlight; a full list is contained in our Supplier Terms.

Usage Limits

- Services and content are subject to usage limits, including, for example, the quantities specified in order forms.
- A user's password may not be shared with any other individual.

If you exceed a contractual usage limit, we may work with you to seek a reduction in your usage so that it conforms to that limit. If, notwithstanding our efforts, you are unable or unwilling to abide by a contractual usage limit, you will execute an order form for additional quantities of the applicable services or content promptly upon our request.

Customisation and configuration of the service is independent of the underlying infrastructure; upgrades do not impact any changes you may have made. As a result of this independence it is typical for customers to customise their service to their own requirements. As the service is SaaS based, Salesforce is aware of which users are using which features etc., therefore we are aware of any potential impact a feature deprecation would have on customers and can work with them should there be a need for a feature deprecation.

8. Service Management

Your success is our success

Customer success is a top priority for Salesforce. Every customer gets a Standard Success Plan for online support and training. Our most successful customers take advantage of our Premier Success Plans to achieve an 80% higher return on their Salesforce investment. Large enterprise customers can benefit from Signature Success, our highest level of service to support their most critical business demands.

Premier and Signature Success packages can be purchased through G-Cloud specialist cloud services.

Standard Success

Every Salesforce customer gets a Standard Success Plan for online support and training. Our Standard Success Plan, included with each licence, provides:

- Success Communities to share with other customers
- Guided Journeys on how to use Salesforce
- Circles of Success Interactive Events
- 12/5/365 online case submission
- Response in two business days
- Trailhead online training
- “Getting Started” online training catalogue

Standard Success is for companies that need standard guidance in getting started with Salesforce. If you need a faster response, 24x7 support coverage, and/or a comprehensive training solution, we recommend our Premier Success Plans.

Premier Success

Our most successful customers take advantage of Premier Success to achieve an 80% higher return on their Salesforce investment.

The Premier Success Plan provides specialised guidance whether you have how-to questions, experience technical issues, need troubleshooting, or want to increase the value you get from Salesforce.

Benefits include:

- 24/7 online and phone support by senior support analysts
- Expert coaching sessions
- Reviews of your platform health and business value
- Developer support
- Expert Assistance

Specialised Guidance

- A discount on all Trailhead Academy courses and certifications
- Quicker response times than Standard Success. When critical issues arise, our skilled support engineers respond within one hour.

Expert Assistance

Expert coaching sessions are specialised engagements designed to help you get more value from Salesforce products. With Premier Success, you can attend webinars on a specific topic and watch coaching videos and then have an individual follow-up session to dive deeper.

We also offer personalised sessions with Salesforce experts to help you overcome obstacles and drive long-term success. More than 200 options cover a range of needs and interests across Salesforce products.

To get real-time answers to your questions, Premier Success includes live Q&A sessions with Salesforce experts, addressing topics from adoption and how-tos to best practices. Specialised technical support is also available for admins and developers to troubleshoot custom code issues.

Specialised Guidance

To help ensure that you see continuing success with Salesforce, Premier Success includes personalised guidance and insights. Through periodic reviews and check-ins, we evaluate your platform health and value maturity. These technical and business reviews assess key areas of platform performance, prioritise areas for growth, and set and track progress against your targets with quantifiable success metrics.

Signature Success

Extend your team with Signature Success. Rest assured knowing our certified experts are here to help you maintain your Salesforce solution.

Signature Success is the highest level of support from Salesforce and provides a high-touch experience led by a named expert who acts as an extension of your team. Customers with Signature Success benefit from increased performance and productivity through all the features of Premier Success plus:

- 15 minutes initial response for critical issues.
- The fastest response times from our most skilled support engineers.
- A designated Technical Account Manager.
- Customer Success Score for actionable insights and recommendations.
- Technical Health Reviews.
- Proactive Monitoring and Key Event Management.

Customer Success Manager (CSM)

Account management by a named champion. An assigned CSM provides consistent advocacy and guidance with a deep understanding of your business. These highly experienced technical experts provide support case oversight and escalation, weekly meetings, and tailored solution guidance.

Proactive services

Signature Success includes 24/7 monitoring that is tailored to your configuration. Your CSM coordinates with Proactive Services Engineers experts and helps ensure you prevent or mitigate potential issues identified, before they can create business disruption. If anything does go wrong, you can expect early alerts, remediation, and reviews to eliminate recurring root cause patterns.

Available at all times and offers the fastest case response times, including 15 minutes for severity 1 issues via phone or chat through our Help site.

Accelerators

Accelerators are quick, personalised work sessions that solve specific Salesforce challenges. The list of accelerators available varies depending on the type of plan you chose; there are no accelerators available with the standard plan. A customer can have unlimited accelerators as long as only one is being delivered at a time.

Learn more: <https://www.salesforce.com/services/success-plans/overview/>

There is no financial recompense model for not meeting service levels.

9. Customer Responsibilities

Here are some key responsibilities we wish to highlight; a full list is contained in our Salesforce Supplier Terms.

Management

Using our online tools, you will need to manage your usage of and access to the service, for example user accounts, installed applications, sites etc.

Compliance

In using the service, you need to ensure your compliance with our terms, which include:

- Being responsible for the accuracy, quality and legality of your data and the means by which you acquired your data. Using commercially reasonable efforts to prevent unauthorised access to or use of the service, and notify us promptly of any such unauthorised access or use.

Usage Restrictions & Information Security

You must:

- Ensure that only information of an appropriate security classification is placed into the service.

You must not:

- Use the service to store or transmit infringing, libellous, or otherwise unlawful or tortious material, or to store or transmit material in violation of third-party privacy rights.
- Use the service to store or transmit malicious code.
- Interfere with or disrupt the integrity or performance of any service or third-party data contained therein.
- Attempt to gain unauthorised access to any service or content or its related systems or networks.
- Permit direct or indirect access to or use of any service or content in a way that circumvents a contractual usage limit.

10. Client-side Technical Requirements

Salesforce is a SaaS (Software as a Service) solution and users access the tools via a web browser. Therefore, no hardware or software installation is necessary.

Browser requirements

Salesforce supports a range of popular browsers. Learn more: [Supported browsers](#)

Internet access

Salesforce is designed to use as little bandwidth as possible, so that the service performs adequately over high-speed, wireless and mobile Internet connections.

While average page size is on the order of 90KB, Salesforce supports compression as defined in the HTTP 1.1 standard to compress the HTML content before it is transmitted as data across the Internet to a user's computer. The compression often reduces the amount of transmitted data to as little as 10KB per page viewed, due to the lack of image content. The site was designed with minimum bandwidth requirements in mind, hence the extensive use of colour coding instead of images.

Our application is stateless; therefore, there are no communication requirements in the background once the page loads like traditional client server applications e.g. Outlook. Therefore, once the page loads there are no additional bandwidth requirements until a user queries or writes information to Salesforce.

Further information here <https://help.salesforce.com/articleView?id=000004958&type=1>

11. Planned Maintenance Windows

When maintenance is scheduled, Salesforce publishes the dates and times of the maintenance windows on trust.salesforce.com. Premier Alerts are sent via email when the maintenance windows are posted to trust.salesforce.com. In the event of planned maintenance that requires customer action in advance, such as updating network settings in preparation for additional login pools, Salesforce endeavours to communicate via email to system administrators of your organisation months prior to the maintenance. If emergency system maintenance is required, customers may be notified less than one week in advance.

There are two types of maintenance at Salesforce:

- System maintenance is for sustaining the security, availability, and performance of the infrastructure supporting Salesforce services.
- Release maintenance is for upgrading Salesforce services to the latest product version to deliver enhanced features and functionality. There are three different kinds of release maintenance: major releases, patch releases, and emergency releases.

Major release maintenance dates and times are posted on trust.salesforce.com approximately one year before the release date. Major release maintenance occurs three times per year.

Patch releases and emergency releases are used to deliver scheduled and ad hoc application fixes and are typically seamless to customers. Whenever possible, patches and emergency

releases are deployed during off-peak hours and without downtime. You can see our preferred maintenance schedule at https://help.salesforce.com/apex/HTViewSolution?id=000176208&language=en_US or learn more at <http://trust.salesforce.com>.

12. Training

We provide comprehensive, free online training with our ground-breaking Trailhead learning portal and provide webinar-based and instructor led training for the majority of our services through the Trailhead Academy. Details can be found in our separate listing for Salesforce Training also listed on the Digital Marketplace.

Further information can also be found here:
<https://www.salesforce.com/uk/services/learn/overview/>

13. Data Centre Locations

For the Salesforce Services (services branded as Force.com, Site.com, Agentforce Sales, Service Cloud, and Chatter), if a new 'Org' of the Salesforce Service is provisioned for a Customer with a billing address in the UK, Customer Data in that 'Org' is stored in data centres in England.

In addition, Salesforce may store information in data centres located outside of EEA, such as identifying information, relating to the Customer's instances(s) of Salesforce Services and users for the purposes of operating the Salesforce Services, such as facilitating the login process and the provision of customer support.

Such identifying information as provided by the Customer in its provision of user accounts shall only include the following personal data about users: first and last name, email address, username, phone number, and physical business address.

For other services which are not Salesforce Services, Salesforce uses various data centres located throughout the world. The location of Salesforce data centres for all services is specified in the Salesforce Infrastructure and Subprocessors Documentation, available under the following link - <https://www.salesforce.com/company/legal/trust-and-compliance-documentation/>

14. Performance

Full details are contained in our terms.

14.1. Service Levels

We will use commercially reasonable efforts to make the services available 24 hours a day, 7 days a week, except for:

- Planned downtime.

- Any unavailability caused by circumstances beyond our reasonable control, including, for example, an act of God, act of government, flood, fire, earthquake, civil unrest, act of terror, strike or other labour problem (other than one involving our employees), Internet service provider failure or delay, non-Salesforce application, or denial of service attack.

14.2. Incident Response Time

The incident response time varies from 15 minutes to two days depending on the level of support selected. Details can be found in section 8

14.3. Incident Updates

Incident update intervals vary based on the level of support selected, ranging from every 30 minutes to longer periods. Details can be found in section 8

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