

Insight Direct (UK) Ltd

Salesforce Lightning Agentforce Service (formerly Lightning Service Cloud)

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



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Salesforce Agentforce Service

1. Service Description

1.1. Service Overview

Salesforce Lightning Service Cloud [Former name] is now [Lightning Agentforce Service]. You may continue to see the former name in our application and documentation. Salesforce Agentforce Service is a comprehensive platform designed to transform how government organisations deliver citizen services. From managing cases, applications, and complaints to powering contact centres, back-office operations, and field operations, Agentforce Service enables public sector teams to deliver exceptionally personalized, AI-powered service across every citizen touchpoint.

Key Public Sector Benefits:

- Comprehensive Multichannel Citizen Engagement: Meet citizens through their preferred channels while maintaining full accessibility:
- Voice Services: Traditional phone systems with intelligent call routing, IVR integration, and call recording for compliance augmented with more modern SIP
- Digital Channels: Web chat, SMS, WhatsApp, Facebook Messenger, and email with unified conversation threading
- Mobile-First Experience: Native mobile apps and responsive web experiences allowing citizens to access services, submit requests, upload documents, and track case status from any smartphone or tablet
- Web Self-Service: Accessible online portals compliant with WCAG guidelines, featuring screen reader compatibility and keyboard navigation
- Paper & Traditional Forms: Digital capture and processing of paper-based applications and forms, with OCR capabilities to convert physical documents into digital cases
- In-Person Support: Kiosk and counter service integration for citizens who prefer face-to-face interactions
- Assistive Technology Support: Compatible with screen readers, voice recognition software, and other accessibility tools
- Advanced Omnichannel Contact Centre: Unify all citizen interactions through a single agent console. Agents seamlessly switch between channels while maintaining full conversation context, citizen history, and case continuity - whether a citizen starts on the web, calls in, visits in person, or uses mobile devices
- Mobile-Enabled Government Workforce: Empower government employees with full mobile capabilities:
- Mobile Case Management: Agents can access, update, and resolve cases from mobile devices when working remotely or in the field
- Mobile Collaboration: Teams can communicate, share updates, and collaborate on cases using mobile-optimised Slack integration
- Flexible Work Support: Enable hybrid and remote work arrangements without compromising service quality
- Mobile Field Service & Inspections: Empower field staff with mobile-enabled solutions for permitting, licensing, code enforcement, and inspections. Real-time data synchronization,

GIS time-stamping, and offline capabilities ensure field teams are productive anywhere, anytime

- **Asset Management & Maintenance:** Track and manage public assets throughout their lifecycle - from infrastructure and facilities to equipment and vehicles. Predictive maintenance capabilities help prevent issues before they impact citizen services
- **Intelligent Case Management:** Deploy fully autonomous AI agents for instant service across all channels, with seamless handoffs to skilled human agents when needed. Maintain case continuity regardless of how citizens choose to engage
- **Self-Service Communities:** Empower citizens with rich, branded web experiences where they can find answers independently, access knowledge articles, submit requests, track service status, and engage with other community members - reducing agent workload while improving citizen satisfaction
- **Unified Citizen View:** Surface intelligent recommendations and actions based on trusted citizen data, natively integrated with the Agentforce Platform
- **Compliance & Accountability:** Built-in SLAs, milestone management, audit trails, and the ability to assign tasks and send automated alerts
- **Seamless Integration:** APIs connect with existing legacy systems and third-party applications without disrupting current operations

Outcomes:

- Maximise staff productivity and citizen satisfaction across office, remote, and field operations
- Resolve cases faster with higher first-contact resolution rates
- Reduce call volume through effective mobile self-service deflection
- Ensure equitable access to services for all citizens, including those with disabilities
- Enable flexible, productive work arrangements for government employees
- Optimise asset utilisation and extend equipment lifecycles
- Improve field service efficiency and reduce operational costs
- Improve transparency and accountability in service delivery
- Scale operations efficiently while maintaining service quality
- Deliver consistent, personalised experiences across all channels and accessibility needs

Lightning Agentforce Service 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/service/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.

The editions are available at simplified price points, making service connected, smarter, faster and personal to help your organisation succeed.

Enterprise Edition

Salesforce Enterprise Edition is a comprehensive CRM platform designed for service organisations, featuring built-in artificial intelligence to enhance customer support operations through automated case routing, predictive insights, and intelligent recommendations. The platform includes a self-service help centre that empowers customers to find solutions independently, reducing support ticket volume while providing 24/7 access to resources. Advanced workflow automation streamlines business processes by handling routine tasks and triggering actions based on predefined criteria, allowing service teams to focus on complex customer issues rather than administrative work.

Unlimited Edition

Salesforce Unlimited Edition is a comprehensive CRM platform that builds upon Enterprise Edition capabilities by adding advanced communication features including chat and messaging functionality, along with 24/7 premier support for mission-critical service operations. The platform includes Salesforce Knowledge, a robust knowledge management system that enables organisations to create, manage, and share information across teams and customers for consistent service delivery. Unlimited Edition also provides a Premier Success Plan with dedicated support resources and a Full Sandbox environment for safe testing and development, making it ideal for large enterprises requiring maximum flexibility, support, and development capabilities.

Agentforce for Service

Salesforce Agentforce 1 is the complete Service CRM platform that builds upon Unlimited Edition with comprehensive AI capabilities and unified data management, designed as an all-in-one solution for enterprise service operations. The platform includes unmetered Agentforce usage for employees, providing unlimited access to AI-powered automation and assistance, plus Tableau Next for real-time customer sentiment analysis that gives teams immediate insights into customer emotions and satisfaction levels. Agentforce 1 also provides annual allocations of Flex Credits and Data Cloud Credits per organisation, offering flexibility to scale AI services and data processing capabilities based on business needs while maintaining cost predictability.

With Agentforce for Service, you'll get:

- Generative and predictive AI built in the flow of work
- Unified customer data and connected channels
- Real-time data that powers analytics and insights

1.2. Service Features

- Console 360 - Unified agent workspace with complete citizen context and history
- Agentforce AI Agents - Autonomous AI handles routine inquiries and processes automatically
- Omnichannel Messaging - WhatsApp, SMS, web chat, email with unified conversation threading

- Self-Service Portals - Citizens access services, submit requests, track cases independently
- Mobile Case Management - Full functionality on smartphones and tablets for everyone
- Voice Integration - IVR, call routing, recording with seamless digital handoffs
- Omni Routing - Intelligent work distribution based on skills, capacity, citizen needs
- Knowledge Management - Searchable articles with intelligent recommendations and multilingual support
- Workflow Automation - Intelligent processes handle routine tasks and compliance requirements
- API Integration Platform - Connect legacy systems and third-party applications seamlessly
- Please refer to Main components and Functions below for more information.

1.3. Service Benefits

- Reduce costs with AI-powered self-service and first contact resolution
- Increase citizen satisfaction serving them through their preferred channels
- Speed deployment using low-code configuration and pre-built templates
- Deliver citizen-focused solutions rapidly via agile development methodologies
- Complete 360-degree citizen view across all touchpoints and interactions
- Increase adoption with intuitive UI, automated macros and knowledge
- Seamlessly integrate legacy systems and back-office applications via APIs
- Automate government processes with intelligent workflows and digital transformation
- Boost productivity and citizen experience with trusted AI automation
- Ensure GDPR, accessibility compliance and meet government digital standards

1.4. Main components & Functions of this service

Console 360

Console 360 provides government agents with a comprehensive, unified workspace that displays complete citizen context across all interactions and touchpoints. This single-pane-of-glass view consolidates citizen history, active cases, related records, and real-time collaboration tools, enabling agents to deliver personalized service without switching between multiple systems. Agents can access citizen profiles, view interaction timelines, manage multiple cases simultaneously, and collaborate with colleagues - all while maintaining full visibility into SLAs, escalation paths, and compliance requirements.

Knowledge Management

The integrated Knowledge base serves as the central repository for accurate, government-approved information accessible to both agents and citizens. Features include intelligent article recommendations, content lifecycle management, and analytics to identify knowledge gaps. Citizens can self-serve through searchable FAQ databases, while agents receive contextual knowledge suggestions during case resolution. Advanced capabilities include multilingual support, version control, and approval workflows ensuring information accuracy and compliance with government standards.

Messaging via Multiple Channels

Comprehensive messaging capabilities enable seamless citizen engagement across WhatsApp, SMS, web chat, social media, and email with unified conversation threading. Citizens can start conversations on one channel and continue on another while maintaining full context. Features include automated responses, rich media sharing, typing indicators, and read receipts. All messaging interactions are automatically captured and integrated into the citizen's complete service history.

Self Service

Robust self-service portals empower citizens to independently access services, submit applications, track case progress, and find answers through intuitive web interfaces. Features include secure citizen authentication, document upload capabilities, case status tracking, appointment scheduling, and payment processing. Mobile-responsive design ensures accessibility across all devices, while integration with Knowledge base enables intelligent search and recommendation engines for faster issue resolution.

Mobile

Full mobile optimization ensures both citizens and government employees can access complete Service Cloud functionality from smartphones and tablets. Citizens benefit from native mobile apps and responsive web experiences for service requests, document submission, and real-time updates. Government staff can manage cases, collaborate with teams, access knowledge resources, and handle citizen interactions while working remotely or in the field, maintaining productivity regardless of location.

Voice

Advanced voice capabilities integrate traditional phone systems with digital channels through intelligent call routing, interactive voice response (IVR), and automatic call distribution. Features include skills-based routing, call recording for compliance, real-time transcription, and seamless transitions between voice and digital channels. Integration with Console 360 provides agents with complete caller context before answering, while voice analytics identify trends and improvement opportunities.

Omni Routing

Intelligent work distribution automatically routes cases, calls, chats, and tasks to the most appropriate available agents based on skills, workload, priority, and citizen needs. Advanced algorithms consider agent expertise, language capabilities, current capacity, and case complexity to optimise resource utilisation. Real-time dashboards provide supervisors with visibility into queue status, agent performance, and service levels across all channels.

Additional Core Components:

Agentforce AI & Automation

Agentforce represents the next generation of AI-powered government service delivery, featuring fully autonomous AI agents that can handle routine citizen inquiries, process standard requests, and resolve common issues without human intervention. These intelligent agents operate 24/7 across all channels, providing instant responses while learning from each interaction to improve accuracy and effectiveness. When cases require human expertise, Agentforce seamlessly hands

off to skilled government agents with complete context and recommended actions. Advanced capabilities include natural language processing for understanding citizen intent, automated case classification and prioritisation, intelligent document processing with OCR, and proactive issue identification. Agentforce also powers predictive analytics to anticipate citizen needs, automate compliance workflows, and generate intelligent insights for service improvement. The platform continuously learns from government-specific data patterns, enabling increasingly sophisticated automation while maintaining transparency and accountability required in public sector operations.

Analytics & Reporting

Comprehensive analytics provide real-time insights into service performance, citizen satisfaction, agent productivity, and operational efficiency. Customisable dashboards track KPIs, SLA compliance, channel effectiveness, and trend analysis. Advanced reporting capabilities support data-driven decision making and continuous service improvement initiatives.

Integration Platform

Robust API framework enables seamless integration with existing government systems, legacy databases, and third-party applications. Pre-built connectors support common government platforms while custom integrations ensure data synchronization and process automation across the entire technology ecosystem.

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: Sales Cloud, Agentforce Service , 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 licence

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.

You can find additional information and best practices for backup and recovery at <http://sfdc.co/BackupAndRecovery>.

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.

Technical Account Manager (TAM)

Account management by a named champion. An assigned TAM 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 TAM 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.

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](http://trust.salesforce.com)

12. Training

We provide webinar-based and instructor led training for the majority of our services. 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/services-training/training_certification/training-by-cloud.jsp

13. Data Centre Locations

For the Salesforce Services (services branded as Force.com, Site.com, Sales Cloud, Agentforce Service, 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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