

**Insight Direct (UK) Ltd**

## **Salesforce Agentforce CRM (formerly Salesforce CRM Cloud)**

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



CONTACT INFO

[pstenderteam@insight.com](mailto:pstenderteam@insight.com)

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## Salesforce Agentforce CRM

## 1. Service Description

### 1.1. Service Overview

Salesforce CRM Cloud [Former name] is now [Agentforce CRM]. You may continue to see the former name in our application and documentation. For users requiring the combined capabilities of both Salesforce Agentforce Sales and Salesforce Agentforce Service, Salesforce Agentforce CRM provides class-leading Salesforce Automation and Service Management in a single licence.

#### **Sales Capabilities**

Powerful sales CRM capability allows you to track relationships, manage activities and assign tasks to other team members. From internal stakeholder management to grant and opportunity management, our extensive reporting provides the transparency and metrics to enable success. Please refer to the Salesforce Agentforce Sales listing on this framework for more details.

#### **Service capabilities**

Salesforce Agentforce Service is a digital toolkit for managers of Cases, Complaints, Contact Centres or Back Office teams and processes. Capabilities include CRM, workflow, APIs into legacy data applications and social and mobile collaboration; as well as the ability to assign tasks, send alerts and increase 1st contact resolution. Please refer to the Salesforce Agentforce Service listing on this framework for further information.

#### **Artificial Intelligence**

Salesforce Agentforce AI is available to provide discovery, insight, recommendations and automation within both sales and service to bring the power of data science to everyone in your organisation as both declarative and generative, trusted AI capabilities grounded in your CRM data, built into your business workflows.

#### **Salesforce Agentforce Sales is available in the following editions**

Different editions are available at simplified price points, each with even more capabilities to help your organisation succeed.

#### **Agentforce CRM 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/crm/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 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, commerce and service. Manage your entire sales cycle with Professional edition, providing lead, contact and account management, forecast management, quoting and contracting. Empower your customer service team. Track your customer cases, manage service contracts and entitlements, and leverage the best-in-class Service Console app. Get real-time business insights across sales and service with customisable reports and dashboards.

### **\* Enterprise Edition**

Deeply Customisable sales and Service CRM for your organisation, offering more flexibility and web API for easy integration. Includes advanced sales pipeline management, deal insights, conversational intelligence and unlocks the full potential of customer service. You can manage complex case requirements and differentiate the agent experience with access to unlimited Service Console apps. Boost productivity - automate tasks, generate content and surface insights with trusted Agentforce AI. Speed up deal cycles with smarter lead prioritisation and automated outreach and improve customer satisfaction through AI-driven case resolution and proactive recommendations.

### **Unlimited Edition**

Unlimited sales and Service power and support. The CRM for sales with intelligent automation and developer support built in. Unlimited edition adds predictive AI capabilities, conversational intelligence and sales engagement. Service additions include advanced communication features with chat and messaging functionality and 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 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. Also 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. 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. Activity, task, call and email management tracking all interactions
2. Powerful analytics capabilities allowing for real-time BI and MI reporting

3. Open, API first allowing for easy integration (SOAP and REST)
4. No-code & Low-code declarative configuration, Open API integration, Training included.
5. Complex case-flow & Kanban, Citizen centric view, Chatbots, Engagement Timeline.
6. Point and Click development, tailoring to your specific processes
7. Extensive knowledge base, proactively suggesting articles internally and externally
8. Built on the proven Salesforce Platform facilitating agile development
9. Opportunity and forecasting, contract, product and campaign management
10. Social Collaboration, omni-channel engagement, Mobile ready, Knowledge base, Analytics, AI

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

### 1.3. Service Benefits

1. Save time by assigning and tracking tasks within the application
2. Collaborate around individuals, companies or opportunities
3. 360-degree view of all interactions via any channel
4. Reduce costs by increasing first call resolution
5. Increase customer satisfaction serving citizens in their channel of choice
6. Speed deployment using point and click configuration
7. Personalise experiences, boost productivity and maximise growth with trusted AI
8. Easy, effective back-office integration using free, open APIs
9. Streamlined sales processes, enhanced productivity, improved customer interactions, sell faster
10. Enable GDPR, CE+ compliance, align with accessibility & GDS standards

### 1.4. Main components & Functions of this service

To experience the powerful features of Agentforce Sales and Agentforce Services please review: <https://www.salesforce.com/uk/products/sales-cloud/features/> and <https://www.salesforce.com/uk/products/service-cloud/features/> 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.

#### Agentforce Sales

##### Contact Management

Have a complete view of your customers, including activity history, key contacts, customer communications, and internal account discussions. Gain insights from popular social media sites right within Salesforce.

##### Opportunity Management

Get all the details on your team's deals — stage, products, competition, quotes, and more. Stay connected to the people and information you need to close every sale.

**Salesforce Engage**

Use the AI insights and recommendations of Sales Engagement to identify prospects most likely to close. Provide reps one place to work from and connect with customers in all channels. Give reps the time to build meaningful relationships by automating tasks like email follow-ups and meeting booking. Sell faster with sales engagement built directly into your CRM.

**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.

**Lead Management**

Make smarter decisions about where to invest your marketing dollars. Track your leads from click to close, while continually optimising your campaigns across every channel.

**Marketing Automation**

Create, deploy, and manage effective online campaigns with Pardot Marketing Automation. Now your sales and marketing teams can work hand-in-hand to generate and qualify leads, shorten sales cycles, and demonstrate marketing accountability.

**Partner Management**

Build and empower your partner network with Partner Community. 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.

**Workflow and Approvals**

Use Visual Workflow to rapidly design and automate any business process with drag and drop simplicity. And drive success with flexible approvals processes for deal discounts, expenses, and more.

**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.

**File 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.

**Reports and Dashboards**

Dashboards offer a real-time picture of your business at a glance. Dig deeper with detailed reports that anyone can create. And access your reports and dashboards from anywhere.

### **Sales Forecasting**

Fast, easy, accurate. Get a real-time view into your team's forecasts. Use inline editing, override visibility, multi-currency support, and more to stay on top of your business.

### **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.

### **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.

### **Agentforce AI**

Sell faster with trusted AI built directly into your CRM. Give every seller an autonomous AI agent that works 24/7 to supercharge selling throughout the sales cycle. Agentforce automates complex sales tasks, accelerates decisions with real-time insights, and proactively guides sellers to close faster while handling routine inquiries independently. Easily customise and deploy AI agents everywhere you work with Salesforce CRM. Now every rep can have an intelligent AI teammate that never sleeps, continuously nurturing leads and advancing opportunities even when your team is offline.

### **Agentforce Service**

#### **Lightning Console - Citizen 360 view**

Unify your agent experience with the Lightning Console from Agentforce Service. Our customer service management solution puts all the information your representatives need at their fingertips, all in one console. With Agentforce Service from Salesforce, agents can manage cases faster, track customer history, view dashboards, and a lot more. All in a single view. No multiple windows. No switching software.

### **Knowledge**

Whether for customer self-service or to enable agents to find the right answer faster, knowledge management is one of the best ways to provide excellent customer care. Help your customers help themselves and help your agents work smarter with easy access to articles, FAQs, and the collective wisdom of the community.

### **Live Chat, Messaging and bots**

Don't put your customers on hold. Meet them on their preferred channels from your website; mobile app, SMS, WhatsApp, Facebook Messenger, Apple Messages for Business, and more. Scale 24/7 support easily with AI-powered chatbots to resolve cases faster by automating answers to common questions and business processes.

### **Self Service Communities**

Communities give customers the self-service portals and discussion forums they need to get the answers they need quickly, anytime, and anywhere. Communities do more than just allow customers to help themselves and each other, they also afford your agents and employees greater potential for customer engagement. Either way, customers win by getting the right answers faster.

### **Mobile**

Manage Agentforce Service cases from anywhere. Field-service agents can solve cases on the go and managers and executives can monitor real-time metrics with Agentforce Service's mobile app. As more and more business gets done from mobile phones, being able to manage, track, and report on cases from anywhere is crucial to providing top-tier customer care.

### **Voice and Phone Support**

Solve customer service cases faster by stitching together voice — the most popular channel — with your digital channels. Deploy Agentforce Voice Agents as the first point of contact to handle routine inquiries autonomously, seamlessly escalating complex cases to human agents when needed. Use AI, automation, and CRM-powered data all natively integrated with the Salesforce Platform to anticipate your customers' needs and intent with voice transcription. Drive customer satisfaction by reacting in real-time with next best actions while Voice Agents provide 24/7 availability and instant response times. Make every agent a superhero by setting up keyword alerts to provide personalised feedback and coaching, while Agentforce handles the volume so your team can focus on high-value interactions.

### **Omni Routing**

Omni-Channel Presence and Routing helps you deliver smarter service faster. By helping route work to the most appropriate and available employee, the task is always matched to the person with the right skill set and the time to solve the problem. Better still, your operation is both more efficient and more transparent.

## Artificial Intelligence

Increase customer satisfaction and boost service team productivity with AI-generated replies, summaries, answers, and knowledge articles powered by your trusted CRM data natively integrated within the Salesforce Platform.

*Agentforce:* Deploy autonomous AI agents that work 24/7 to handle routine inquiries, escalate complex cases intelligently, and provide instant responses while your human agents focus on high-value interactions that require empathy and creative problem-solving.

*Resolve customer service cases faster:* AI-powered case classification automatically defines and routes cases based on user histories, sentiment analysis, and trending patterns, ensuring optimal resource allocation and faster resolution times.

*Deliver the right answers, with confidence:* Agentforce uses comprehensive case context, customer history, and real-time data to provide accurate, personalised responses instantly. This ensures customers receive consistent, reliable support around the clock while reducing wait times and improving first-contact resolution rates.

## 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, 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
- Japan Privacy Seal from the Japan Information Processing Development Corporation (JIPDC)
- TUV Certificate
- FedRAMP
- Cyber Essentials
- Privacy Shield

### Global Audit Compliance

- ISO 27001, 27017, 27018, 9001, 42001
- SSAE 18/ISAE 3402
- SOC-1
- SOC-2
- SOC-3 (SysTrust)
- PCI-DSS
- Cyber Essentials

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/](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 utilising 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.

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](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](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](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 and Restore 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 organise 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 meta-data 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 Service 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 average user also is known to view roughly 120 pages from our site per day. However, it is best to measure any page that has been customised, especially if Visual Force components have been added to the page, to get an accurate measurement of the page size.

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](http://trust.salesforce.com). Premier Alerts are sent via email when the maintenance windows are posted to [trust.salesforce.com](http://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](http://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](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 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, 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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