

Insight Direct (UK) Ltd

Salesforce Lightning Agentforce 360 Platform (formerly Salesforce Lightning Platform)

- Cloud Hosting - Digital Marketplace - Lot 1a
- G-Cloud 15



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Salesforce Lightning Agentforce 360 Platform

1. Service Description

1.1. Service Overview

Salesforce Lightning Platform [Former name] is now [Lightning Agentforce 360 Platform]. You may continue to see the former name in our application and documentation. The Platform delivers powerful services to develop digital experiences. AI workflow software makes it easy to automate processes, while low code and no code solutions simplify app development with features like point and click development, business logic, mobile SDK, file storage, analytics, multi-language development, social collaboration, and cloud identity solutions. It includes services like UI components, flexible page layouts for mobile, and custom actions — all geared for going and growing fast via a multi-tenant, cloud infrastructure.

And you can start AI app development with Agentforce across your organisation, grounded in your data. Empower business users, admins and developers to embed AI into every business solution quickly with no code, low code and pro code tools. Equip admins and developers with AI-powered tools so they can work faster and more efficiently. Build, test and deploy every solution securely and with governance, using native tools that make it easy to follow modern DevOps processes on Salesforce.

Build amazing apps. Connect everything.

Developing with the Salesforce Agentforce 360 Lightning Platform takes weeks instead of months, days instead of weeks, and hours instead of days.

It's a new era. The public has higher demands, but government IT teams are being asked to deliver more with less. Meet the challenge by building new, modern, and mobile apps faster than ever before.

A major challenge facing those working in government is the ability to adjust to the rapid pace of change and doing more with less. While other sectors are busy innovating, the government is too often saddled with IT systems designed for a bygone era. No one understands this better than those responsible for providing technology solutions for government staff. IT departments and developers receive hundreds of competing requests from literally dozens of different teams. To make matters worse, they are already burdened by out-dated legacy systems that require too much time and too many resources to maintain. It is enough to overwhelm the best-qualified, most-organised teams. Simply put, most IT teams are not currently set-up to succeed.

Salesforce's Agentforce 360 Lightning Platform solution has dramatically changed how all levels of government builds, runs, and uses applications. Say goodbye to the time, cost, complexity, and frustration you encounter at every turn with hardware, software, and backlog for traditional, on-premise solution models. Everything from building, integrating, and running apps is much easier

in the cloud. Instead of running apps yourself, you access them as a service over the Internet. Build, integrate, and deploy any type of government app, for any need, from personal productivity apps—email, calendar, and spreadsheets—to full-blown enterprise apps for policy & programme, project management, customer service, budget & finance, and much more, all in the cloud. Plus access to 7000+ pre-built applications in the Salesforce AppExchange that can be used and customised for specific needs.

Policy and programme apps

Instead of spending 80% of their budget and time just keeping the lights on, government IT departments are now leading with innovation. Shift your agency's IT with social and mobile apps that track everything from legislation and policy proposals to correspondence—and everything in between. Like the General Services Administration (GSA) in the US which consolidated hundreds of legacy apps to 15 and built 26 new ones—all in less than 6 months.

Customer service apps

With new, custom customer service apps, you can easily document and track customer service requests submitted by citizens, public officials, and customers and see improvements of up to 30% in your response rates. Leading organisations are demonstrating that in the social era, the government can be even better stewards of taxpayer's money.

IT and operations apps

More and more organisations are tapping into the Salesforce Agentforce 360 Lightning Platform to reduce their large legacy app libraries and free up time to build new ones. The Texas Department of Information Resources is automating critical processes and quickly meeting the demand for new applications. DIR has built 26+ apps to support hundreds of organisations that serve 25+ million people. Unlock the data trapped in rigid backend systems with your own cloud apps.

Financial management apps

These days, every agency at every level must demonstrate return on taxpayer investment and manage finances in more transparent and accountable ways. The answer? Make financial information available via any device at any time. Mobile and social financial management apps for the government show real-time results in dashboards that clearly show value—without the headaches of managing hardware and software upgrades.

Connect Everything

Powerful APIs make building apps that seamlessly integrate with a connected world, faster and easier. Whether you're connecting to back office systems, legacy technology, or connected devices, Salesforce delivers data and insights to make every connection more meaningful. The Salesforce Agentforce 360 Lightning Platform is the world's #1 cloud platform. It gives you everything you need to build apps for desktop and mobile so you can turn ideas into apps faster. It's all about delivering modern business apps to customers and employees. It's about going from idea to app, faster than ever before. Develop and deploy mobile and browser apps, fast.

Business Analysts

- The ability to create an app with just clicks.

- The power to bring a business idea to life with an app — and be social and mobile instantly. A way to deliver data and insights to every employee
- Admin tools to add new users and control user access with just a few clicks

Technical Developers

- An API-first cloud platform, which means all of your apps connect to your business data
- An extensible mobile app with UI frameworks, allowing you to build faster than ever
- Instant deployment, real-time distribution
- Developer productivity tools to go even faster

Learn more here: <https://www.salesforce.com/uk/platform/overview/>

1.2. Service Features

1. Build, deploy, manage AI agents at scale for real outcomes.
2. Unify data with trusted metadata and semantics for accuracy.
3. No-code & Low-code declarative configuration, Open API integration, Training included.
4. Protect agents/workflows with built-in security, automated threat remediation, and policy controls.
5. Transform data into real-time, explainable insights, predictions and recommendations.
6. Create a single federated identity across all your cloud apps.
7. Build, test, deploy AI-powered apps/agents securely using DevOps Centre.
8. Create the perfect user experience with Lightning; anyone can customise.
9. Extend your enterprise with trusted partners, apps, and integrations that scale.
10. Operate confidently on Hyperforce, the secure, compliant, high-performance platform foundation

1.3. Service Benefits

1. Transform data into real-time, explainable insights for every decision.
2. Enable companies to operate with intelligence and speed.
3. Rapid, flexible app development using no-code, low-code, or code.
4. Scale on demand, test in sandboxes, deploy on any device.
5. Eliminate time, cost, complexity, and frustration of traditional IT systems.
6. Integrate easily to existing systems and mobile enable legacy data.
7. Enhance process automation and decision-making with personalised, trusted AI.
8. Access a vibrant ecosystem with over 7,000 pre-built applications.
9. In-built security and identity models help save time and money.
10. Enable GDPR, CE+ compliance, align with accessibility and GDS standards

1.4. Main components & Functions of this service

Leveraging Salesforce's leading multi-tenant, cloud infrastructure, your apps get the trust and security that over 100,000 enterprise customers depend on to run their business. And since it's API first, you can build your app with any experience or UI you want — helping you connect with the next generation of devices, apps, and customers in a whole new way. The powerful services you need to build apps fast.

SALESFORCE Artificial Intelligence (Salesforce AI)

Make smarter decisions and more intelligent apps with built-in artificial intelligence. Salesforce AI is artificial intelligence for everyone. You have data. Lots of data. Salesforce AI learns from all that data to deliver predictions and recommendations based on your unique business processes. Pair that with automation, and you have the insights and time to truly connect with your customers.

LIGHTNING UX

Salesforce Lightning gives everyone a more productive way to work. Lightning is a whole new way to see CRM. For business users, it's a customisable and more intuitive way to work, faster. For admins, it offers a framework to build Salesforce apps faster. And with Lightning Developer Services, you can quickly spin up apps for any and all use cases, and easily reuse code across components — without breaking your customisations. Create the perfect user experience with Lightning, a fast, beautiful UI anyone can customise.

MOBILE

Run your business from your phone on the mobile-first CRM platform. You need a mobile-first platform for a mobile-first world. Salesforce is instantly mobile. And our suite of mobile apps, starting with the Salesforce Mobile App, lets you run your business from your phone immediately. In fact, our platform is built mobile-first, so every app you create or business process you automate helps anyone do more from the road. Additionally, we offer SDKs and mobile-ready AppExchange apps.

SECURITY

Build on a robust and flexible security architecture trusted by companies around the world. Discover the world's most trusted and secure enterprise cloud platform. Salesforce starts with a unique multitenant architecture that gives you an out-of-the-box layer of security. Additional layers give you a fine degree of security and compliance control over everything from user and client authentication, to administrative permissions, to data access and encryption.

INTEGRATION SERVICES

Get a complete view of your business by bringing together any kind of data — even legacy data from Oracle and SAP. Deliver a unified, 360-degree view of the customer. Bring all your customer data into a unified view — even data from legacy and on-premises systems. Oracle, SAP, you name it. Our platform lets you integrate at the identity, data, process, and UI layers. Plus, connect

to device, product, and app data. So you get a true 360-degree view of the customer across sales, service, marketing, and more.

ANALYTICS

Find hidden business opportunities using AI-augmented analytics from any data source, on any device. Deliver fast, easy, and customisable analytics. Satisfy the demand for business analytics without the need for more IT resources. Stakeholders can create personalised reports and dashboards by department, role, and individual. Drag and drop fields, filters, groupings, and charts for a real-time view with instant drill down to operational data. Share insights via social feeds and mobile devices.

COLLABORATION

Drive productivity throughout your business with enterprise-level collaboration tools. Sell, service, market, and more — as a team. Salesforce puts collaboration tools at everyone's fingertips. Build a community for customers, partners, or employees that lets you share knowledge, find experts, ask questions, surface articles, or even work together on living documents with Salesforce data.

SEARCH

Help employees quickly find anything, from any file source, with intelligent search. Find files or documents, even outside of Salesforce, with just one search bar. With Salesforce federated search, you can create a single search point for docs and data spread across your cloud and on-premises file stores. Now with Salesforce AI Search you get even more search power: searching is personal, natural, and actionable. You can find and do things faster with search results that are more actionable and tailored to how you work. Salesforce search capabilities intelligently surface the right results to help employees get what they need quickly. You can even surface results from outside services like Google Drive, SharePoint, and more, right inside Salesforce.

IDENTITY

Create a single federated identity across all your cloud apps. Manage cloud identity and access for employees, customers, and partners. Salesforce provides a single, federated identity for all your cloud apps, including Salesforce apps and other cloud providers. A single employee identity allows users to seamlessly move between apps, and simplifies the process of provisioning and deactivating users. And with customer identity, creating a branded login experience for consumers and partners is easy.

CODE

Give developers the power and flexibility to build, scale, and manage apps on Salesforce. Get everything you need to create and scale trusted apps. Now developers have more power to build and customise inside Salesforce using tools they know and love with Salesforce DX. Plus, you can even put AI into every app with Agentforce, or create apps in any language your developers want with Heroku.

METADATA ARCHITECTURE

Get automatic upgrades that won't break anything because all customisations are specified as metadata. This is the secret sauce of the platform: metadata architecture. All customisations in the Salesforce schema, including processes, configurations, apps, and more, are specified as metadata. In our architecture, we keep your metadata layer separate from our services layer, which allows us to deliver seamless, easy upgrades. Consider yourself future-proofed.

MULTITENANCY

Focus on business, not infrastructure — get logically separated resources you can build, manage, and lockdown as you see fit. Discover shared technology infrastructure, and infinite ways to make it your own. The world's most trusted enterprise cloud platform is built with multitenancy at its core. That means you have no servers to provision or hardware to worry about. Instead, we manage the infrastructure, code base, security, and more.

PRIVATE APPEXCHANGE

Create one secure, branded location to distribute apps to employees or share with other public sector organisations. Give users instant access to any mobile or cloud app they need to be productive, on any device. Streamline distribution and access management for IT.

Learn more about the app exchange here:

<https://www.salesforce.com/solutions/appexchange/overview/>

Learn more about platform here: <https://www.salesforce.com/uk/platform/overview/>

Agentforce 360 Lightning Platform 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/eu/platform/enterprise-app-development/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.

Platform Starter

Helps your organisation to Build customised apps that fuel sales, service and marketing productivity. This edition comes fully loaded with 10 Customised Objects, Process Automation and the AppExchange.

Platform Plus

This edition extends the Salesforce Platform across your organisation and transforms app development. It will give you and your teams 110 Customised Objects, the Lightning Console and the AppExchange.

Platform Log In & Dev Credits

This edition provides credits and log-ins. It will consume 50 Credits per Platform Log In User. Each Platform Log In User gets the same features as Lightning Platform Starter.

And all our licenses include our '**Standard Success Plan**' which sets your organisation up for success with self-guided, always-on resources for example - access to Knowledge Articles, documentation and Trailhead and to the Global Trailblazer Community.

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

Global Audit Compliance

- ISO 27001, 27018
- SSAE 18/ISAE 3402
- SOC-1
- SOC-2
- SOC-3 (SysTrust)
- PCI-DSS
- Cyber Essentials
- WCAG 2.2 AA

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

Production data centres are designed to mitigate the risk of single points of failure and provide a resilient environment to support service continuity and performance. The Covered Services utilise secondary facilities that are geographically diverse from their primary data centres, along with required hardware, software, and Internet connectivity, in the event Salesforce production facilities at the primary data centres were to be rendered unavailable.

Salesforce maintains a disaster recovery plan that supports a robust business continuity strategy for the production services and platforms. Our platform is configured in a high availability mode and redundant fashion, and our Global Product Operations team monitors the software around-the-clock to ensure top performance. 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

All networking components, network accelerators, load balancers, Web servers, and application servers are configured in a redundant configuration. All Customer Data submitted to the Covered Services is stored on a primary database server with multiple active clusters for higher availability. All Customer Data submitted to the Covered Services is stored on highly redundant carrier-class disk storage and multiple data paths to ensure reliability and performance. All Customer Data submitted to the Covered Services, up to the last committed transaction, is automatically replicated on a near real-time basis to the secondary site and backed up to localised data stores. Backups are verified for integrity and stored in the same data centres as their instance. The foregoing replication and backups may not be available to the extent that Customer has managed packages that are uninstalled by Customer's administrator during the subscription term because doing so may delete Customer Data submitted to such services without any possibility of recovery.

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/articleView?id=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/content/dam/web/en_us/www/documents/platform/fy24-salesforce-backup-datasheet.pdf.

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 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, 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 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, Sales Cloud, 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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