

Insight Direct (UK) Ltd

Salesforce Agentforce Public Sector (formerly Salesforce Public Sector Solutions)

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



CONTACT INFO

pstenderteam@insight.com

Table of Contents

Salesforce Agentforce Public Sector	2
1. Service Description	2
1.1. Service Overview	2
1.2. Service Features	5
1.3. Service Benefits	5
1.4. Main components & Functions of this service	6
2. Information Assurance	7
3. Data Backup / Restore and Disaster Recovery	9
4. On-Boarding	11
4.1. Deployment	11
4.2. Configuration and Customisation	11
5. Off-Boarding	11
5.1. Termination	11
5.2. Data Extraction and removal	11
6. Pricing Summary	12
7. Service Constraints	12
8. Service Management	13
9. Customer Responsibilities	15
10. Client-side Technical Requirements	16
11. Planned Maintenance Windows	16
12. Training	17
13. Data Centre Locations	17
14. Performance	17
14.1. Service Levels	17
14.2. Incident Response Time	17
14.3. Incident Updates	18

Salesforce Agentforce Public Sector

1. Service Description

1.1. Service Overview

Salesforce Public Sector Solutions [Former name] is now [Agentforce Public Sector]. You may continue to see the former name in our application and documentation. Agentforce Public Sector provides a flexible and modular approach to case management, enabling government agencies to choose specific components that best meet their needs. Built on Salesforce's robust platform, this system is recognised for its low-code capabilities and superior end user service. The "Industry Common Layer" simplifies the management of complex relationships and records, facilitating the creation of industry-specific workflows, automation, integrations, and user interfaces.

The modular design of Agentforce Public Sector supports a wide range of government-specific use cases. For instance, agencies can implement a new grants management system or manage a network of third-party providers for social services programs by selecting the appropriate components. This flexibility allows each agency to tailor the solution to its unique requirements, thereby enhancing the effectiveness of caseworkers and improving the delivery of government services.

Agentforce Public Sector is specifically developed for government organisations because it includes features not typically required in the private sector, such as program management, licensing, and permitting. Built on Agentforce Service, it also offers a comprehensive customer service platform that includes call centre management, live chat, and social media integration. This versatility makes it suitable for various public sector needs, from managing end user inquiries about business licenses to handling social service benefit entitlements.

The adaptability of Agentforce Public Sector enables organisations to respond to changing mission demands and integrate with legacy systems using AI, automation, and no-code tools. This integration enhances efficiency and agility, allowing organisations to deliver services on time and within budget. Whether using pre-built solutions or developing new use cases, organisations can accelerate service delivery, improve government operations, and deploy faster with out-of-the-box applications tailored for government services. These turnkey applications include License and Permit Management, Inspection Management, Grants Management, Emergency Program Management, Benefit Management, Employee Experience, Provider Management, Social Program Management, and Talent Recruitment Management, all of which can be customised to meet specific needs.

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



Deeply Unified Platform

Agentforce

Agentforce is a complete AI system that integrates data, AI, automation, and humans to deploy trusted AI agents for concrete business outcomes. It works by giving teams tools, services, and agents that can tap into the power of a large language model (LLM) and their connected business data to identify what work needs to be done, build a plan to complete the work, and then execute the plan. Agentforce is deployed in both public-facing applications such as public portals, as well as in tools for public sector employees such as contact centre agent applications. By leveraging Salesforce's robust AI capabilities, Agentforce assists in optimising and accelerating operations with self-service, making it particularly beneficial for Agentforce Public Sector where efficiency, accuracy, and customisation are critical.

Agentforce operates by incorporating organisational data - both structured and unstructured - and then applying a dynamic reasoning engine - known as the Atlas Reasoning Engine - in order to evaluate potential courses of action. This combination of applying contextual data and reasoning are what makes agentic AI from Agentforce different from previous forms of AI. As an example, Agentforce allows users to create dynamic application forms, automate approval processes, and conduct dynamic assessments to evaluate applications. Agentforce also supports the creation of care plans and referrals to assist end users in need, ensuring that public sector agencies can deliver services tailored to their specific requirements. This comprehensive approach ensures that public sector agencies can modernise and automate their critical business processes, ultimately transforming the delivery of public services.

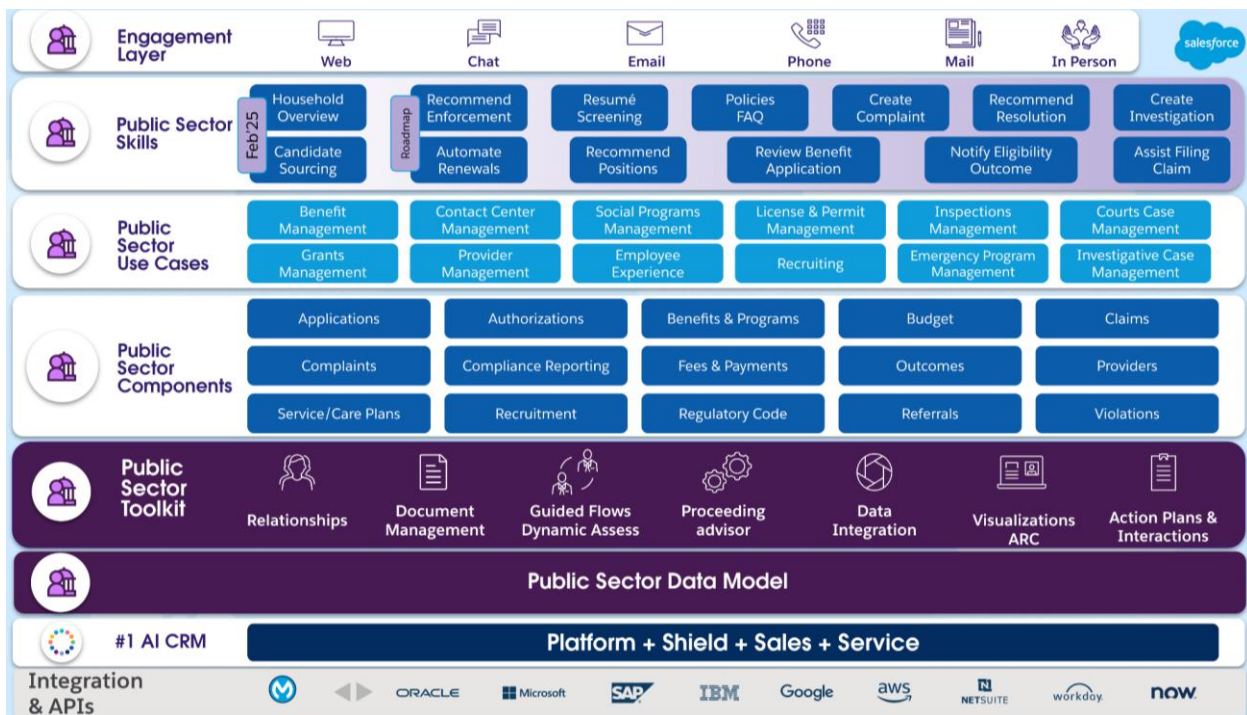
Agentforce for Public Sector reasons accurately with public sector knowledge. Public Sector tasks often required specialised knowledge and policies built specifically for Public Sector users and government agencies. Public Sector powered by Agentforce are skilled and tested for public sector tasks, ensuring these agents are addressing the unique challenges faced by government agencies such as trust and

transparency (improved satisfaction with government agencies by getting answers to their questions like how to apply, what are these government programs or services and do I qualify).

One of the key benefits of Agentforce for Agentforce Public Sector is its ability to streamline and automate complex workflows. For example, public sector agencies involved in licensing, permitting, inspections, emergency response, social and human services, and grants management can use Agentforce to enhance their operational efficiency thus reducing case backlog and within compliance timeframes. By automating routine tasks and providing AI-driven insights, Agentforce helps agencies reduce manual effort, minimise errors, business policy and process adherence, and improve overall service delivery. This leads to faster processing times, better resource allocation, improved participation in public sector programs, cost reduction by case and enhanced citizen satisfaction.

Another key benefit of Agentforce is the data protection and privacy provided with the Einstein Trust Layer. The Einstein Trust Layer, embedded within Agentforce, is a critical component of Salesforce Agentforce Public Sector (APS), designed to ensure unparalleled data security and privacy. This sophisticated security framework employs advanced encryption, rigorous access controls, and continuous monitoring to protect sensitive information from unauthorised access and potential breaches. By integrating these robust security measures, the Einstein Trust Layer fortifies the integrity and confidentiality of data, which is paramount for public sector organisations handling sensitive citizen information. This not only enhances the reliability and credibility of the Agentforce platform but also aligns with the stringent security requirements of public sector operations.

Moreover, Agentforce's integration with Salesforce's Experience Cloud allows public sector agencies to publish dynamic application forms and other interactive content directly to their constituents with the specific branding by the government agency. This ensures that the communication and engagement processes are seamless and personalised (native language and what the citizen is looking to do). Agentforce helps public sector agencies answer end user questions, guide them through the application process, help view benefits and services, provide the latest status and reduce the number of calls to the call centre or service centre, while delivering stellar end user services.



Agentforce Public Sector with Agentforce

What is Included in Agentforce Public Sector?

Salesforce Agentforce Public Sector (APS) builds on the core capabilities of Service Cloud and the Salesforce Platform, enhancing them with over 200 standard objects in the Public Sector Data Model. These additional objects support various public sector use cases, allowing government organisations to manage complex processes such as intake procedures, decision explanations, and dynamic forms in a composable, modular fashion.

Key Features Include:

- **Public Sector Toolkit:** This toolkit incorporates the features of Omnistudio which offer essential capabilities such as document generation, dynamic forms that adapt to user responses, a business rules engine, and a decision explainer that clarifies eligibility changes.
- **Pre-built Components:** These user-interface components are adapted from best practices in other industries, such as financial services and communications, and are tailored to meet the specific needs of the public sector. These user-interface components are supported by rich logic which simplifies the user experience.
- **Composable Architecture:** Administrators can customise and integrate Salesforce APSPSS with existing cloud or on-premise systems, providing flexibility in building and managing processes.
- **Public Sector Pre-built Applications / Use Cases:** APS includes pre-built, end-to-end applications for common public sector scenarios such as end user service requests, benefits and eligibility management, regulatory compliance, and disaster response. These applications can be cloned and customised to meet the specific needs of different agencies.

- **Omni-Channel Engagement:** APSPSS supports communication across multiple channels, including email, SMS, web portals, and social media, thereby improving citizen engagement.

Why Agents are Critical for the Public Sector

- **Workforce Challenges:** Globally, according to the Department of Labor, nearly 50% of public servants are approaching retirement within the next five years, creating a critical workforce gap. Additionally, fewer candidates are applying for public service roles, while budget constraints require agencies to do more with fewer resources. The learning curve is also high in many areas due to the complexity of thousands of policies.
- **Efficiency and Knowledge Retention:** Agentforce bridges this gap by enabling organisations to onboard new employees quickly. Agents can instantly search and interpret extensive policy guides, ranging from 300 to 1,000 pages, which previously required years of experience to master.
- **Data-Driven Precision:** Agentforce Public Sector Agents leverage the rich data provided by over 200 standard objects and dozens of public sector use cases. This ensures agents can deliver the most accurate, contextually relevant, and efficient responses in areas like benefits, grants, and claims.

Benefits of Agentforce Public Sector

- **Enhanced End User Experience:** Agents working alongside humans improve service delivery, providing clear and timely responses that elevate the constituent experience to best-in-class levels.
- **Operational Efficiency:** Public Sector organisations can do more with less by automating routine tasks, enabling public servants to focus on higher-value activities.
- **Contextual Accuracy:** Agents possess deep knowledge of public sector processes, allowing them to provide accurate guidance that aligns with complex policies and regulations.

The integration of an agent layer into Salesforce APS empowers governments to tackle workforce challenges, improve efficiency, and deliver exceptional public service. By combining the power of agents with human expertise, APS ensures that public sector organisations remain agile, responsive, and capable of delivering more with fewer resources.

How Agentforce Public Sector provides Value to Public Sector Organisations

Agentforce Public Sector (APS) provides numerous advantages, including access to new releases three times a year and innovations tailored specifically for the public sector. By offering a standardised solution supported by a network of certified system integrators, APS helps reduce technical debt and deployment time while promoting greater choice. In the absence of Salesforce APS, System Integrators (SIs) are required to customise their SI-built accelerators to meet the unique needs of each government agency, making upgrades expensive due to the necessity of reviewing and rewriting custom developments to incorporate new innovations. APS addresses these challenges by significantly lowering the costs associated with deployment, maintenance, new builds, and technical debt, ultimately reducing the total cost of ownership.

Salesforce APS drives lower customisation and allows for continued innovation with releases 3 times a year, features including:

- **165+ Additional Standard Objects** that support Public Sector organisations
- **Community Templates:** Benefit Assistance Portal, License Portal, Provider Portal, File a Complaint
 - **Question and Answer Sample Template (OmniScript):** Apply for Individual License, Assess your License Needs Pre-screening, Benefit Application, File a Mandated Report
 - **Sample Business Rules:** Business Rules Engine Energy Assistance Program
 - **Mobile App:** Visit Framework
 - **User Interface:** View Benefits, Services & Disbursements, Benefit Session Enrollment, Hierarchical View (Inspection, Account Page, Public Complaint), Constituent Snapshot, Application Summary, Attendance Tracking, Inspection History, Inspection Details
 - **Flow:** Household Create, Merge, Split, Create Benefit Schedule and Sessions, Schedule Disbursements and Adjustments, Session Enrollment from Care Plan and Benefit Assignment, Care Plan Guided, Provider Search, Referral Intake, Complaint Intake, Application Review
 - **Common Toolkit:** Business Rules Engine, Dynamic Assessments, OmniStudio (OmniScript, FlexCard, DataRaptor, Integration Procedure, Document Generation), Action Launcher (Search, Frequent Actions, Recently Used Actions), Timeline, Audit Trail, Action Plans, Accounting Subledger, Actionable Relationship centre, Life Events, Discovery Framework Question Bank, Relationship Insights, Outcome Management, Decision Explainer, Decision Table, Document Checklist Items, Interaction Summaries, Record Alerts, Service Process Studio

These additional standard objects and features are applicable to Public Sector agencies and more objects and features are being added with each release. Here are several key ways Salesforce helps Public Sector agencies achieve its objectives:

- **TCO Cost Savings:** While the initial upfront investment in modernisation may be more significant, it is expected to lead to substantial total-cost-of-ownership savings over time. A reduction in the architectural complexity of the many tools/batch processes/custom code is likewise expected to reduce the associated IT operational maintenance. There is no longer a need to custom build screen after screen or require custom code to simply add a new field.
- **Future-Enabled:** Modern systems are designed to be adaptable and scalable, making it easier to incorporate future technological advancements and policy changes. By future-proofing the system, the Public Sector agency can ensure its sustainability and relevance in the face of evolving technological and business-process landscapes, as well as be prepared for new innovations like Generative AI and Agents, and unforeseen circumstances such as the most recent pandemic.
- **Enhanced Efficiency:** A modernised system can streamline administrative processes, automate routine tasks, and improve overall workflow efficiency. This can lead to faster case processing, reduced backlog, and more efficient eligibility and enrollment. We know that 41% of time is lost to low value and repetitive tasks based on Salesforce' annual Business Value Survey. Streamlined processes, reduced paperwork, and improved efficiency can result in lower line-of-business costs, maximising the value of the state's resources and budget.
- **Improved Data Integrity and Accuracy:** Implementing a modern system allows for better data management, including secure storage, effective retrieval, and accurate tracking of crucial information. By having a single platform, Public Sector organisations can move in the direction of supporting a unified customer profile across other integrated systems. This can result in more accurate and reliable reporting, reducing errors and improving decision-making processes.

- **Better Compliance:** Modern systems often come with built-in compliance features, ensuring that the programs adhere to state and federal regulations. This can help minimise the risk of non-compliance penalties and legal issues, providing greater assurance that the system operates within the bounds of the law to promote program integrity.
- **Enhanced User Experience:** A modernised system can offer a user-friendly interface, making it easier for both workers and customers. Intuitive design and improved accessibility can lead to increased user satisfaction, higher engagement, and better overall service delivery leading to fewer support requests and calls thus reducing operating costs.
- **Strengthened Security Measures:** Upgrading to a modern system can bolster security measures, protecting sensitive data from potential breaches and cyber threats that might otherwise happen with an architecture that is more rigid with more products to stay on current upgrades. Advanced security protocols can safeguard the system from unauthorised access, ensuring the confidentiality and integrity of critical information.
- **Integration Capabilities:** A modern Public Sector system often comes with integration capabilities, allowing for seamless connectivity with other relevant systems and databases. This integration can facilitate the exchange of information, improve coordination among various departments, and enhance overall collaboration and data sharing.

Salesforce is uniquely positioned with the only platform that combines the power of all three of these elements in one cloud platform: a customer centric design, purpose-built functionality for benefit management, and a low-code no-code, cloud-based platform with continuous innovation in mind.

Agentforce Public Sector 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/government/solutions/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.

Enterprise Edition (EE) (Public Sector Foundation - Advanced)

The EE comes with out-of-the-box case management and applications tailored for public sector organisations. Enterprise edition includes out-of-the-box configurable Apps, Digital Service Delivery Tools and Low-Code/No-Code Automation and AI.

Unlimited Edition (UE) (Public Sector Foundation - Advanced)

The UE comes with unlimited case management power for public sector organisations. Unlimited Edition Includes all Enterprise Edition capabilities, and allows for up to 2,000 Custom Objects as well as unlimited Custom Apps.

Agentforce 1 Edition (Public Sector Service)

The complete Public Sector solution with built-in AI and unified data. Unlimited Edition, Supercharged with Agentic AI, Data Cloud, Slack and more. It includes Includes All Unlimited Edition Capabilities and Flex credits (for AI use), allows you to connect Salesforce and External Data with Data360.

1.2. Service Features

- Omni-channel contact centre serving end users in their channel of choice
- Preconfigured Public Sector Processes; Scale support with AI-powered features
- Powerful analytics capabilities allowing for real-time BI and MI reporting
- No-code & Low-code declarative configuration, Open API integration, Training included.
- No code tools to industrialise Forms and create Business Rules
- Open, API first allowing for easy integration (SOAP and REST)
- Webchat, Agents, Email, Social and Mobile out of the box
- Case-flow & Kanban, collaboration, Engagement Timeline, dedicated Public Sector views
- Extensive knowledge base, proactively suggesting articles internally and externally
- Social Collaboration, omni-channel engagement, Mobile ready, Knowledge base, Analytics, AI

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

1.3. Service Benefits

- Reduce costs with easy self-service and decrease case time resolution
- Increase Case worker productivity with Public Sector tools & AI
- Serve end users in their preferred channel increasing trust & satisfaction
- Accelerate implementation time using pre-configured processes/agents for Public Sector
- Deliver user focused solutions rapidly, via agile methodologies
- 360 degree view of the end user across all channels
- Increased adoption from easy-to-use UI, including macros & knowledge
- Integrate with back office using free APIs
- Automate business processes, intelligent workflows & digitise middle office
- Provide call agents scripts to support training
- Enable GDPR, CE+ compliance, align with accessibility & GDS standards

1.4. Main components & Functions of this service

Experience the powerful features of Agentforce Public Sector to learn faster and perform better. Please review the [Agentforce Public Sector documentation](#) for further information about how the features of Salesforce Agentforce Sector Solutions can support and transform your agent and customer service experience. Some aspects of these features are also summarised below.

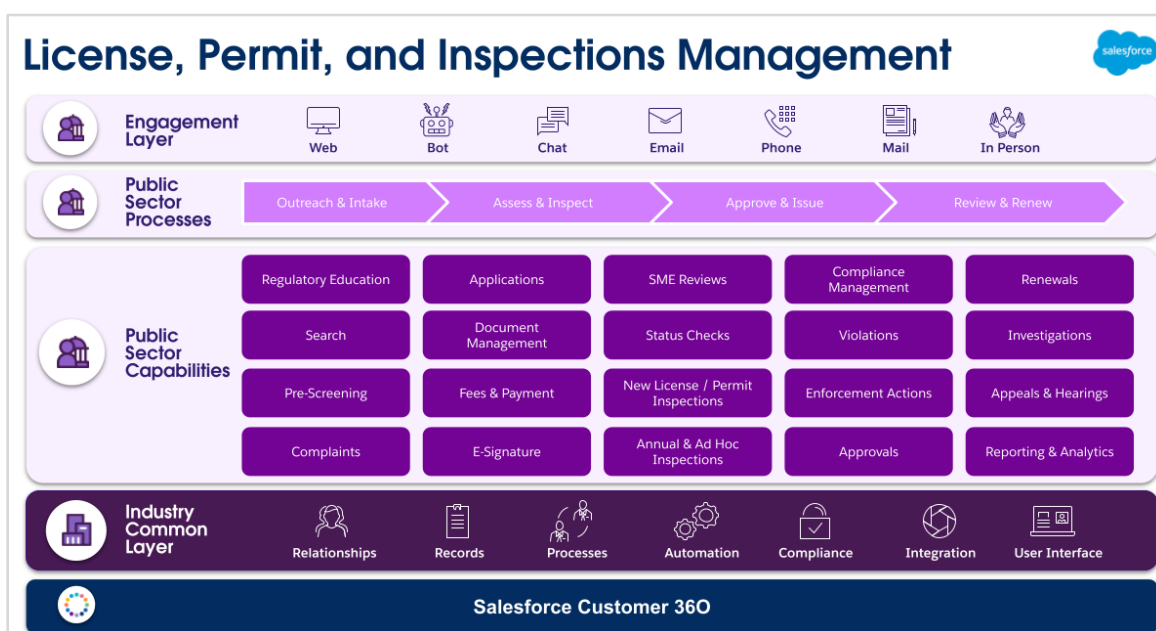
License, Permit, and Inspection Management (LPI)

License, Permit, and Inspection Management is a comprehensive solution designed to streamline the processes associated with regulatory compliance. This product is particularly beneficial for government agencies, municipalities, and organisations that need to manage a high volume of licenses, permits, and inspections efficiently. By leveraging this solution, users can automate and simplify the entire lifecycle of these critical activities, from application submission to final approval and compliance monitoring.

One of the primary functions of License, Permit, and Inspection Management is to facilitate the application and approval process. Applicants can submit their requests online, track the status of their applications in real-time, and receive notifications about any required actions or updates. This not only enhances transparency but also significantly reduces the time and effort required for both applicants and administrators.

In addition to application management, the product offers robust inspection scheduling and tracking capabilities. Inspectors can access their schedules, record inspection results, and generate reports directly from the field using mobile devices. This ensures that inspections are conducted promptly and that all relevant data is captured accurately and efficiently.

The high-level benefits of License, Permit, and Inspection Management include improved operational efficiency, enhanced end user satisfaction, and better compliance with regulatory requirements. By automating routine tasks and providing a centralised platform for managing all related activities, organisations can reduce administrative overhead, minimise errors, and ensure that all stakeholders have access to the information they need when they need it.



Capability Map for License, Permit, and Inspections Management

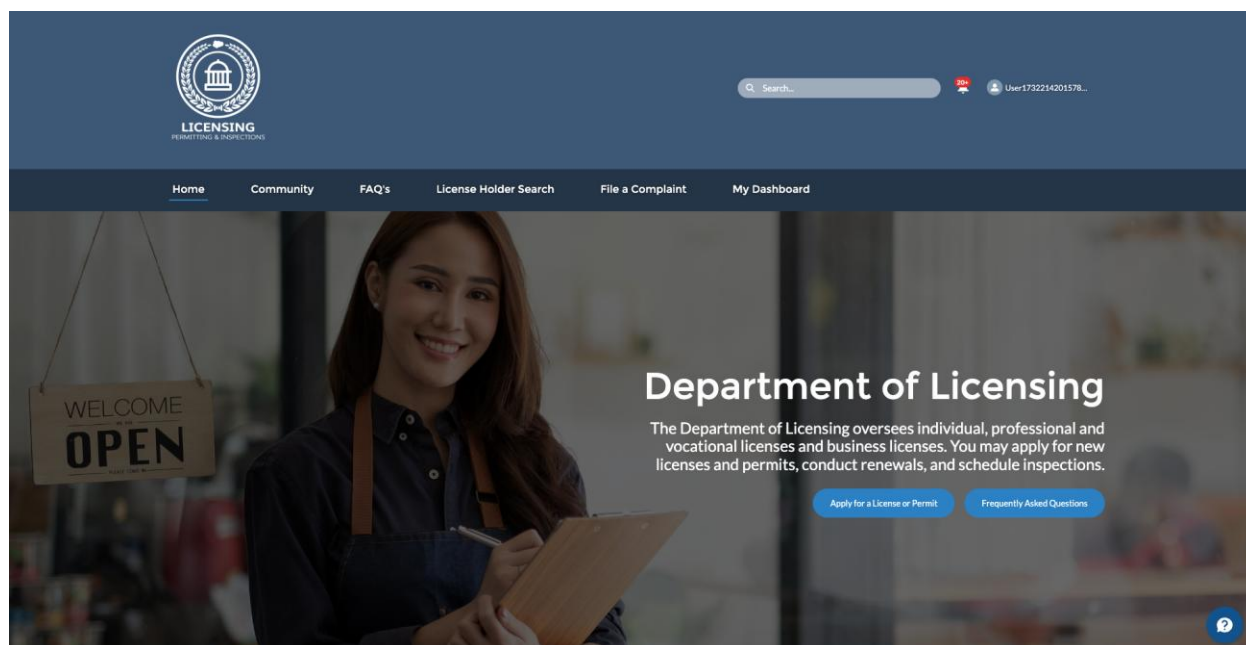
Agentforce Public Sector License and Permit Management

With License and Permit Management, organisations can better engage with citizens and other organisations to protect communities while also fostering economic growth. More than ever, governments

are looking to redefine how they engage with those they serve by making services easier for the public to understand, access, and use.

This solution provides a "one stop shop" by deflecting standard support requests through an online portal, with License and Permit Management, regulatory organisations can:

- **Digitise the citizens' experience.** Launch a single portal to support everything from service requests to application updates, fee payments, renewals, or simply updating license information.
- **Streamline the application process.** Reduce time tax on everyone with smart forms, intelligent checklists, and guided next steps. Streamline the process of managing licenses and permits, making it easier to track and manage all necessary documentation.
- **Track Compliance.** Ensure compliance with regulations by providing a clear record of all licenses and permits, including when they were issued, when they expire, and any associated conditions or restrictions.
- **Deploy faster.** Unlock digital licensing and permitting services faster with a pre-built data model, templates, workflows, and analytics built for the government.
- **Automate application processing.** Automate application reviews with a flexible, no code business rules engine. Send reminders when a license or permit is about to expire.
- **Reduce errors.** Help applicants find, apply, and check status for all licensing and permitting requirements. Implement prescreening to help them fill out the right application, every time.



Digital licensing and permitting site that guides users through required regulatory compliance processes in a single online portal

Features and Benefits of Agentforce Public Sector for License and Permit Management

The Salesforce Agentforce Public Sector for Licensing and Permitting supports your organisation's broad range of license and permit requirements but also provides business functionality, as well as declarative tools to extend and customise with clicks, not code. Our solution enables regulatory organisations to

focus on business priorities rather than spending valuable resources on managing infrastructure, software, and security.

Dynamic Application Forms

Agentforce Public Sector enables agencies to create dynamic application forms accessible through an Experience Cloud site. These forms are user-friendly and customisable, capturing all necessary information for license and permit applications. They support conditional logic, ensuring applicants only see relevant questions based on their previous answers.

Application Information

Note: Before applying for this permit, please make sure you have all the required parent permits

Business Account
Wilson Salon & Spa, Inc.

Industry *
Personal Care Services

Business Activity *
Barbering & Cosmetology

Authorization Category *
License

AuthorizationType *
Cosmetologist License

Application Category *
Basic

Cancel Save For Later

Steps
Application steps may change based on your response

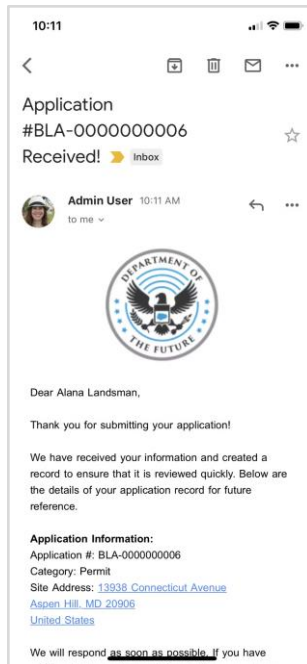
- APPLICATION INFORMATION
- ESTABLISHMENT INFORMATION
- SALON INFORMATION
- OWNERSHIP INFORMATION
- APPLICATION ATTACHMENTS
- CERTIFICATION
- REVIEW APPLICATION
- CONFIRMATION

Next

Applicants can quickly and easily complete all necessary forms that update based on user input

Automated Approval Processes

The solution includes automated approval processes that streamline the review and approval of applications. This ensures consistency and integrity across workflows, reducing the time and effort required for manual reviews. Automation allows intake agents, compliance officers, and other users to efficiently review and approve applications for licenses, permits, programs, and services.



Once an application is submitted, the citizen gets an automated email confirmation and the reviewer receives a notification that a new application has been received

Business Rules Engine

The Business Rules Engine automates policy decisions and calculations, such as processing fees for business license applications. This feature ensures accurate and consistent calculations, providing transparency into the reasoning behind determinations. It also supports the automatic creation of regulatory transaction fees from inspection visits or violation enforcement actions.

Experience Cloud Site

Agencies can build an Experience Cloud site where citizens can apply for licenses and permits, view and manage their applications, inspections, and fees. The site includes preconfigured pages for various tasks, such as applying for or renewing a license or permit, and viewing inspection history. Lightning web components can be added to enhance the functionality of these pages.

OmniScript Flows and Components

Agentforce Public Sector provides OmniScript flows and components that automate licensing and permitting workflows. These include applications for business and individual authorisations, forms for assessing license or permit needs, and complaint filing forms. Some components are available directly in Agentforce Public Sector, while others can be downloaded from GitHub process libraries.

Regulatory Compliance

The solution supports the configuration of regulatory authorities, business regulatory authorisation types, training requirements, and fees. This ensures that all licenses and permits issued comply with relevant regulations. Agencies can set up training courses, course offerings, and exams that individuals must complete to qualify for professional and occupational licenses.

Constituent Interaction Tools

Agentforce Public Sector includes a collection of tools and components that help caseworkers and other employees efficiently address constituent concerns. These tools provide context for interactions and put useful, actionable tasks at users' fingertips. Features like Action Launcher, Action Plans, and Interaction Summaries enhance the ability to manage and resolve constituent issues effectively.

Document Management

The solution simplifies and centralises document management processes, reducing manual data entry. Features like Intelligent Document Automation and Omnistudio Document Generation allow organisations to create and manage documents such as reports, certificates, and letters efficiently. Document checklists and identity verification flows further streamline the handling of citizen documents.

Customisable Workflows

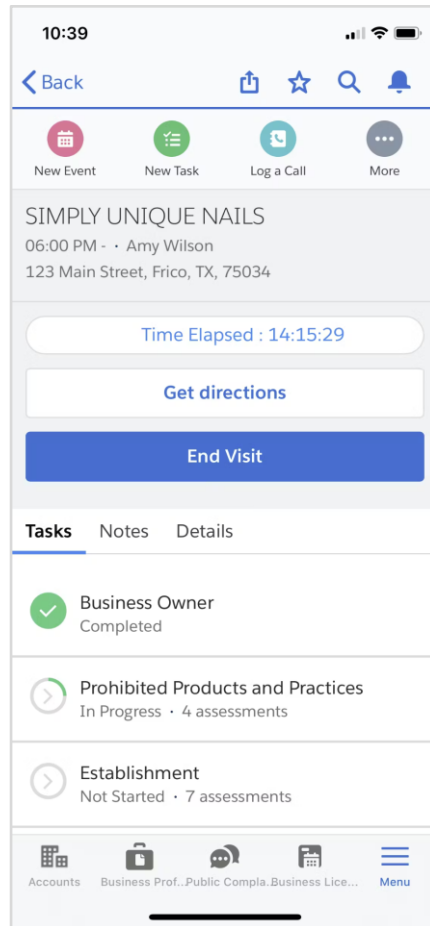
Agencies can create robust start-to-finish processes to automate responses to service requests from citizens. The Service Process Studio allows for the creation of customised workflows that address specific organisation needs, from intake to resolution. This flexibility ensures that Agentforce Public Sector can be tailored to meet the unique requirements of different public sector organisations.

Agentforce Public Sector Inspection Management

Inspections, audits and reviews are a key part of any regulatory compliance program. Whether it's an inspection of a new home, a business that wants to open or an audit of a financial filing, inspection management provides a repeatable consistent process of ensuring regulations are adhered to.

With Inspection Management, regulatory agencies can:

- **Streamline Processes.** Salesforce Inspection Management helps to streamline and automate the inspection process, reducing the risk of human error and ensuring that all necessary steps are followed. Easily assign inspections with just a few clicks
- **Provide a mobile-first experience for inspectors.** Automatically notify inspectors of their daily visit plan on their mobile device.
- **Customisable Workflows.** Configurable inspection / audit checklists help inspectors perform inspections and verify no steps were missed and all regulations are adhered to. Whether from a desktop or entirely from the mobile device, inspectors / auditors can capture notes, take pictures and flag violations all in a guided step-by-step process.
- **Manage Risk.** Salesforce Inspection Management provides tools for data analysis, helping to identify and manage potential risks (records of inspections, incidents, violations, and complaints), which is a key aspect of regulatory compliance
- **Compliance Reporting.** Leverage robust reporting features, making it easier to demonstrate compliance to regulatory bodies.



Mobile-first inspection where an inspector is guided through an inspection checklist to ensure no steps are missed, ensuring community safety

Features and Benefits of Agentforce Public Sector for Inspection Management

Conduct Inspections by Using the Mobile App

The Agentforce Public Sector Inspection Management app allows users to conduct inspections directly from a mobile device. This feature is particularly useful for field inspectors who need to perform their duties on-site. The mobile app provides a user-friendly interface that simplifies the inspection process, ensuring that all necessary data is captured accurately and efficiently.

Conduct Inspections by Using the Desktop App

For those who prefer working from a desktop environment, the Inspection Management app is also available in a desktop browser. This feature offers the same robust functionality as the mobile app, allowing users to conduct inspections, review data, and generate reports from the comfort of their office. The desktop app ensures that all inspection data is synchronised and accessible across devices.

Create Violation Enforcement Actions

The ability to create violation enforcement actions is a critical feature of the Inspection Management app. This functionality allows inspectors to issue citations or other enforcement actions directly from the app.

By streamlining the process of documenting and addressing violations, this feature helps ensure compliance and enhances the overall efficiency of the inspection process.

Real-Time Data Synchronisation

One of the key benefits of the Inspection Management app is its real-time data synchronisation capability. Whether using the mobile or desktop app, all data entered during inspections is immediately synchronised with the central database. This ensures that all stakeholders have access to the most up-to-date information, facilitating better decision-making and more effective management of inspection activities.

Customisable Inspection Templates

The Inspection Management app offers customisable inspection templates, allowing organisations to tailor the inspection process to their specific needs. Users can create templates that include all necessary fields and checklists, ensuring that inspections are thorough and consistent. This customisation capability helps organisations maintain high standards and comply with regulatory requirements.

Integration with Other Agentforce Public Sector

The Inspection Management app is designed to integrate seamlessly with other Agentforce Public Sector. This integration allows for the sharing of data and insights across different functions and departments, enhancing collaboration and improving overall service delivery. For example, data collected during inspections can be used to inform case management, permitting, and other public sector activities.

User-Friendly Interface

The app features a user-friendly interface that simplifies the inspection process. The intuitive design ensures that users can quickly learn how to use the app, reducing the need for extensive training. The interface is designed to be accessible and easy to navigate, making it suitable for users with varying levels of technical expertise.

Enhanced Reporting and Analytics

The Inspection Management app includes robust reporting and analytics capabilities. Users can generate detailed reports on inspection activities, identify trends, and gain insights into areas that may require attention. These analytics tools help agencies make data-driven decisions and improve the effectiveness of their inspection programs.

Secure Data Management

Security is a top priority in the Inspection Management app. The app includes features to ensure that all data is securely stored and transmitted. Access controls and encryption are used to protect sensitive information, ensuring that only authorised users can access and modify inspection data. This focus on security helps agencies comply with data protection regulations and maintain the trust of their constituents.

Offline Functionality

The mobile app includes offline functionality, allowing inspectors to conduct inspections even in areas with limited or no internet connectivity. Data entered while offline is stored locally on the device and automatically synchronised with the central database once a connection is re-established. This feature ensures that inspections can be completed without interruption, regardless of connectivity issues.

Agentforce Capabilities

Some potential use cases for Agentforce within Licensing, Permitting and Inspections include:

- **Applicant Agent:** Prior to an applicant starting the application process, this could provide all of the requirements for a particular license or permit and present that to the applicant. Licenses and permits can have complicated requirements around all of the information and documentation. Sometimes there may be multiple steps along the way.
- **Complaint Agent:** An external user who would want to complain about a particular business/license owner, this agent could walk through the process and in certain cases deflect the creation of a complaint/case if the complaint isn't necessary or a complaint has already been created.
- **Prepare for an Inspection Agent:** This Agent could help an inspector preparing for an inspection by summarising and reviewing all of the information related to the inspection/visit and help identify all the relevant information in order to help them identify any issues with the inspection location, or required information they may need to review while onsite. Information could come from previous violations at the company or issues with similar types of organisations.
- **Create/Schedule a Visit Agent:** This Agent would assist the internal reviewer/adjudicator of a license application to create and schedule a visit for the inspector and identify which steps are needed to complete the review.
- **Summarise Random Inspection Candidates Agent:** As complaints or other issues arise, this Agent could help assist Internal Adjudicators/Compliance Managers to identify accounts that may need to be reviewed for potential ongoing issues/compliance issues and regulatory issues and help list out which ones may be a good candidate for a random on site inspection. This agent could allow for quick visualisation/summary of those accounts that may have received a number or history of complaints that may trigger actions to verify/enforce any regulatory issues.

Grants Management

Agentforce Public Sector helps agencies simplify grants management and get the right funding to the right grantees faster. Grants Management from Salesforce Agentforce Public Sector is an out-of-the-box app, purpose built for the public sector. Designed to manage the entire grantmaking lifecycle from administration to close-out. Our Grants Management solution provides the foundation government organisations need to create seamless support across modern, digital channels and streamline processes.

With Grants Management, agencies can:

- Gather all required information up front so grants are complete and require less revision after initiation
- Increase collaboration across departments and agencies
- Use dynamic forms to easily model citizen interactions to present and collect data online
- Allow procedural configuration of complex mathematical processing steps
- Streamline the award process and gain more valuable data insights and metrics in reporting
- Manage inspections and non-compliance

From smaller regional agencies with brand new processes to large-scale programs disbursing billions within weeks, our quick-to-implement solutions for digital-first, dynamic experiences can effectively transform government grants:

- **Efficient Grant Creation and Processing:** Manage increased grants workloads through easy to use “point and click” tools. View and manage your entire workload through their entire lifecycle using out-of-the box tools. Use an applications framework that allows Grants Administrators to create application form templates and even reusable application form sections that can be assigned to funding opportunities.
- **Streamline the Application Process:** Solicit and process grant applications online with branded applicant and external reviewer portals. Automate vet applications with customised steps and real-time verification. Utilise out of the box components to display all configured sections of a form, dynamically displaying the editable or read-only form defined for a given application section.
- **Reviewer Workspace and Progress Reports:** Grant application reviewers can efficiently view all application details and add comments and ratings on a single screen. Creating and managing grant progress reports is streamlined for grantmakers, while submission is simpler for grantees.
- **Collaborate and Approve as a Team:** Easily collaborate across departments on grant application reviews, validation and approvals. Automate workflows and connect your team and data on one platform — from any device — so everyone can see application status at any time.
- **Understand your Impact:** Streamline the reporting process by collecting and managing grantee progress, financial and performance measure reports online. Measure your impact on core issue areas with robust reporting and dashboards that aggregate data across grant portfolios.
- **Measure the Impact of Grants with Outcome Management:** Use Outcome Management to make a measurable and actionable impact strategy for your grants. Define your impact strategy, collect data, and track the progress of your grants. Monitor your grant impact strategy by setting time-bound targets and monitoring ongoing results.
- **Evolve and Scale:** With a flexible and extensible platform that can be easily customised

with clicks, not code, customise a grants management solution with Salesforce to fit your giving strategy now and in the future.

What's Included in Grants Management

Grantmaking organisations are responsible for managing funding opportunities, setting grant budgets, reviewing applications, awarding grants, and overseeing disbursements on an ongoing basis. On the other hand, grant seekers search for grants to apply for, submit their proposed budgets, and report back on their achievements after receiving the grant. To streamline this process, organisations can manage the complete grant lifecycle by easily creating and managing funding opportunities, setting budgets, tracking spending, and efficiently receiving and reviewing applications to disburse funds.

By using grant and budget management objects and components, organisations can create and manage funding opportunities and budgets more effectively. Built-in automation and dynamic application forms help reduce paper-based processes, speeding up reviews and approvals. Additionally, an Experience Cloud site template can be used to create a site where grant seekers can discover funding opportunities, apply for grants, and report on their progress against goals and key performance indicators (KPIs). This approach simplifies the grantmaking process for both funders and applicants, making it more efficient and effective. Key Features Include:

- **Salesforce Platform.** Grantmaking is built on the Salesforce platform to work with your existing license. This combination means that Grantmaking is equipped with features and capabilities that give you a 360-degree view of your stakeholders so that you can serve them best. And Grantmaking is secure, flexible, and customisable, letting you implement it in your institution and customise it to meet your needs.
- **Grantmaking Data Model.** Grantmaking extends your Salesforce license to include access to grant and budget management objects and components. The Grantmaking data model is designed to help you support and manage the entire grant lifecycle. Create funding opportunities, manage applications and reviews with an application framework and reviewer workspace, track grant applicant budgets and results, and more. The data model supports the work of everyone in your institution, including grant managers, reviewers, grant applicants, collaborators, and Salesforce admins.
- **Experience Cloud for Grantmaking.** Grantmaking includes the Grantmaking Experience Cloud template that's preconfigured and includes the objects you need for grant applications and post-award engagement. Alternatively, add the Grantmaking objects to your existing site or create a site and add the Grantmaking and Budget Management objects to your Experience Cloud site.
- **Automation Toolkit.** Grantmaking works with feature sets available in your license that put the platform and data model to work. Omnistudio, Action Plans, Document Tracking and Approvals, Business Rules Engine, and other components, services, and tools help you automate paper-based and cumbersome processes. For example, you can create dynamic forms to speed up application or review processes.
 - [OmniStudio](#). Omnistudio provides a suite of services, components, and data model objects that combine to create Industry Cloud applications. Create guided interactions using data from your Salesforce org and external sources.
 - [OmniStudio Document Generation](#). You can generate documents from Microsoft Word (.docx) and Microsoft PowerPoint (.pptx) templates. These templates can include values from any JSON-based data in the text, including data from any Salesforce object. You

can optionally convert the resulting documents to PDF format. With Omnistudio Document Generation, you can generate contracts, proposals, quotes, reports, non-disclosure agreements, service agreements, and so on.

- o [Document Checklist Items](#). Create a document checklist item for each file required from a customer. A customer or user then uploads a relevant file for the document checklist item, and the files are tracked through an approval process. Customers upload new versions of rejected documents and track the progress of their uploaded documentation from submission to approval.
- o [Business Rules Engine](#). Simplify determining eligibility or qualification and automate complex decision-making to find solutions faster using Business Rules Engine. The key components of Business Rules Engine are expression sets and lookup tables. Decision matrices and decision tables together constitute lookup tables. Use a Business Rules Engine component or a combination of components to design business rules to provide automated business solutions in a workflow created using any tool. Business Rules Engine is a suite of services, components, and objects that can be used to create business rules that perform complex lookups and calculations.
- o [Decision Explainer](#). Decision Explainer has setup objects that capture logs for how a rule or an expression set ran, making it easy for reviewers to explain the outcome of the rule to users.

Individual Application
IA-0000000418

Applied Date: 2024-12-05, 11:47 p.m. | Account: Jennifer's Custom Creations | Application Status: In Progress

Details | **Form Overview** | Budget | Related

▼ Required Sections

Application Overview
Application Stage Definition: [Project Overview](#)
Individual Application: [IA-0000000418](#)
Status: Not Started
Individual Application Task Due Date: Required [Edit](#)
Type: Grantmaking
Required: ☒

Funding Request Details
Application Stage Definition: [Project Request](#)
Individual Application: [IA-0000000418](#)
Status: Not Started
Individual Application Task Due Date: Required [Edit](#)
Type: Grantmaking
Required: ☒

Project Location
Application Stage Definition: [Project Location](#)
Individual Application: [IA-0000000418](#)
Status: Not Started
Individual Application Task Due Date: Required [Edit](#)
Type: Grantmaking
Required: ☒

▼ Optional Sections

Proposed Budget
Application Stage Definition: [Proposed Budget](#)
Individual Application: [IA-0000000418](#)
Status: Not Started
Individual Application Task Due Date: Optional [Edit](#)
Type: Grantmaking
Required: ☐

Application Objectives and Supporting Activities
Application Stage Definition: [Application Objectives and Supporting Activities](#)
Individual Application: [IA-0000000418](#)
Status: Not Started
Individual Application Task Due Date: Optional [Edit](#)
Type: Grantmaking
Required: ☐

Program You Are Applying For
Funding Program: [Community Development Investment Grant](#)
Current Program: Active
Status:
CFDA #: A-2230
Total Funding: \$1200000

Important Dates
09/16/2025 - Accepting Applications
07/31/2025 - Applications Due
08/29/2025 - Award Decisions Communicated

Application Framework allows the applicant to incrementally view and submit sections of their application, and progress reports as an awardee

Features and Benefits for Agentforce Public Sector Grants Management

Agentforce Public Sector for Grants Program Management is designed to modernise and automate the grant management process and offers a comprehensive suite of tools designed to streamline the grant management process for both grant makers and grant seekers. Below is an overview of the key features and their associated benefits.

Grant Maker Experience

Supports the creation and management of funding opportunities and grant submissions. This feature provides a 360-degree view of stakeholders, funding opportunities, and award metrics. By offering a holistic view, it enhances the ability to manage and track all aspects of the grant lifecycle efficiently, ensuring that all relevant data is easily accessible and actionable.

Grant Seeker Experience

Offers an online platform for applicants to find, apply for, and report back on funding opportunities and budgets. This ensures a seamless and transparent application process, making it easier for applicants to navigate the system and stay informed about their application status, thereby increasing engagement and satisfaction. The Application Framework design makes it easier for applicants to see what sections are required and which have been completed. The connected budget management data model allows for a spreadsheet-like experience for submission of proposed budget line items, which can also optionally be pre-defined per funding opportunity. The award recipient will save time with easy to use tools for the submission of post award reports.

Dynamic Application Forms

Create and publish dynamic application forms on an Experience Cloud site for citizens. These forms are designed to be user-friendly and efficient, reducing the time and effort required to complete applications. This feature ensures that the application process is streamlined and accessible, minimising errors and improving the overall user experience. Forms will adapt to the applicant inputs, and optionally hide or expose additional fields or pages based on the answers in previous steps. These forms are so flexible they can even support connections to additional forms if additional information is needed. The Application Framework approach allows the Grants administrator to break down large applications into smaller more bite-sized sections that can be reused across other funding opportunities. This allows the option of incremental reviews as sections are completed, collaboration options for the applicant to assign sections to other members of their staff, and rapid adoption to any legislative changes that might impact all funding opportunities and their associated application requirements.

Automated Approval Processes and External Reviewer Workspace

Design automated workflows to review applications efficiently. This feature helps in reducing manual intervention and speeds up the approval process. By automating routine tasks, it allows staff to focus on more strategic activities, thereby increasing productivity and reducing the risk of human error. If your use case necessitates adding external reviewers, you are able to assign them a role as an external reviewer and provide them with a single page workspace to efficiently view all application details and add comments and ratings on a single screen.

Document Generation

After internal review is complete with a selected grantee, the granting agency can automatically notify the grantee of their award and require them to sign acceptance documents. Agentforce Public Sector Grants Management can generate documents and contracts and, with an out-of-the-box DocuSign integration, send them out for e-signature — digitising a traditionally manual, paper-based process.

Disbursement and Financial Approval

Grant coordinators can easily schedule disbursements and tie them to key milestones the awarding organisation must complete before funding issuance. Coordinators can set up a disbursement schedule and automate the payment records or create one-off disbursements as necessary. Creating a record kicks off an approval process to ensure compliance with agency policies and procedures.

Accounting Subledger

Track how and where funds are received, paid, and allocated by using Accounting Subledger with Agentforce Public Sector. Access and act on insights from financial data, and work with accurate, up-to-

date financial projections. Accounting Subledger reduces reconciliation time and increases transparency by transforming transactional data in Salesforce into an accounting format. Field mappings allow additional fields from source records to be pulled in for inclusion on the accounting records for export (i.e. currency and fiscal period). The Accounting Subledger allows for detailed tracking of financial transactions, such as regulatory transaction fees, funding awards, and benefit disbursements. This ensures that all financial activities are accurately recorded and easily accessible. By mapping financial transactional data to Accounting Subledger objects, you can seamlessly integrate this data into your existing accounting system. This integration can be achieved through reports, custom integrations, or middleware solutions, ensuring that your financial data is consolidated and up-to-date. The system helps in maintaining compliance with regulatory requirements by ensuring that all financial transactions are properly documented and reported. The design of the Accounting Subledger ensures that financial data is accessible to all relevant stakeholders, promoting transparency and equity. This is essential in the public sector and grants management, where multiple parties may need access to financial information.

Manage Award Requirements

Funding Awards are displayed in Experience Cloud, allowing grantees to navigate seamlessly to forms and complete their reporting requirements online. Grant recipients can track deadlines, submit progress reports, and request funding award amendments, which grant makers can efficiently review, approve, or deny. This streamlined process reduces administrative burdens while ensuring accurate and timely submissions.

Budget Management

Grant makers and grant seekers can collaboratively manage budgets using pre-built components and a standardised data model for submitting proposed budgets, updating post-award details, and tracking actual spending against plans. Users can quickly view variances between the proposed budget and actual spend. Automated variance calculations highlight under- or overspending by category, enhancing accountability and transparency. Real-time updates provide a shared view of planned versus actual spending, enabling grantees to justify variances and grant makers to monitor financial performance and ensure alignment with funding goals. Funders and grant managers gain visibility into variances, allowing them to address overspending with grantees proactively.

Grantmaker Outcome Management

Grant makers can define and measure impact strategies to track progress and drive meaningful outcomes. The platform supports setting time-bound objectives, collecting and analysing data, and monitoring grant performance against defined targets. Key features include defining outcomes, activities, and indicators with baseline and target values, and tracking progress over time to ensure alignment with program goals. Organisations gain comprehensive visibility into funding outcomes, enabling them to refine program designs, share insights internally and externally, and make informed, outcome-driven decisions to maximise the impact of their grants.

Agentforce Capabilities / Use Case

Leveraging the power of Agentforce, potential Applicants get an interactive experience with an Agent to learn more about possible grants being offered, get personalised assistance to review eligibility and even support multi-language engagement. Once submitted, intake or application reviewers can leverage Agents skilled with analysing the bigger picture in order to surface potential hidden risks with the application. Such as whether or not an applicant is in good standing or compliant with any other active or

previous awards. Post award monitoring efforts can be assisted with Agents, supporting the gathering and consolidating information and helping applicants and grants coordinators handle the traditionally manual steps.

Benefit Management

Applying for government benefits is one of the most direct ways people interact with their government. However, finding and applying for the right program is often challenging. That's why Salesforce introduced Agentforce Public Sector Benefit Management. It helps governments connect eligible individuals with benefit programs by making information more accessible and reducing the administrative work for case workers and those they serve.

Now, many agencies are partnering with the private and nonprofit sectors to meet increased needs for benefits and services. To help boost the effectiveness of these partnerships, Salesforce built Agentforce Public Sector Provider Management. It enables governments to connect program participants to the right service providers on a single platform.

With Benefit Management, agencies can:

- **Simplify benefit search, enrollment, and notification.** Improve the applicant experience with guided intakes for pre-screening and application processes through all channels (web, email, call centre, mobile)
- **Increase Program Awareness.** Bringing awareness to those who need it via outreach efforts.
- **Capture the correct data on the application** including supporting evidence (identity, pay stubs, tax documents) that supports the entire benefits lifecycle with accurate data from the beginning to help with accurate benefit determination and disbursement.
- **Automate eligibility determination and benefit disbursement.** Eliminate manual processing errors with rules-based logic and guided workflows from initial program eligibility intake to plan assignment and selection, through enrollment completion, benefit issuance and managing care plans.
- **Boost productivity and serve people faster.** Minimise administrative burden with digital-first case management and data-driven case insights with a 360 degree view of all interactions and the ability to capture and store structured and unstructured case data such as case notes or associated documents
- **Manage end-to-end provider service delivery.** Drive program impact and transparency with network, service delivery, and outcome management in a single, digital hub.
- **Continuously monitor.** Ensure the citizen receives the services they need and maintains an open door of communication. Capture how the citizen is progressing on care plan goals, assessments and reporting on program outcomes.

The screenshot displays the Agentforce Public Sector Benefits Management user interface. At the top, there is a search bar and navigation tabs for 'Public Sector: Case...', 'Applications', and '00001519'. The main content area is divided into three sections:

- User Profile:** Displays the profile of Radhika Marshall, including her email address (rmarshall@mailinator.com), phone number (8175555555), and address (100 14th Street, Jersey City, NJ 07310).
- Application Details:** Shows the application 'Radhika Marshall_LIHEAP' with details such as Application Number (00001519), Date/Time Opened (4/3/2023, 8:25 AM), Type (Services & Benefits), Status (New), and Application Owner (Radhika Marshall).
- Case Timeline:** A section titled 'Case' showing a list of events. The first event is 'Check in with Radhika' on October 26, 2023. The second event is 'Email: Subject: Application Received' on April 3, 2023.

User Interface where a case worker can quickly review all relevant details of an individual or household

Features and Benefits for Agentforce Public Sector Benefits Management

Agentforce Public Sector for Benefit Management provides a comprehensive, efficient, and user-friendly platform that supports the effective administration of benefits programs. Features and benefits include the following:

Benefit Assistance Experience Cloud Site

The Benefit Assistance Experience Cloud Site provides a centralised platform for citizens to interact with benefit programs. Through this site, applicants can apply for benefits, recertify their eligibility, report changes in their circumstances, and file complaints. This online platform improves accessibility and convenience, allowing citizens to manage their benefits from anywhere at any time.

By offering a self-service portal, organisations can enhance the efficiency of their operations and reduce the need for in-person visits or phone calls. This not only saves time for both citizens and staff but also ensures that the process is more streamlined and user-friendly. The Experience Cloud Site can be customised to meet the specific needs of different programs, providing a flexible and scalable solution for benefit management.

Pre-Screening

Citizens looking at possible benefits they may be eligible for can utilise the Agentforce Public Sector Benefit Management pre-screener. It is a guided anonymous high level questionnaire to assess potential programs, benefits and services the citizen may be eligible for.

Agentforce Public Sector ships with delivered omni scripts, flex cards and business rules to assess potential eligibility. The BenefitAssistance/AssessEligibility OmniScript captures some basic information

about the citizen which may be used to determine the Benefits he/she is eligible for. The EvaluateBenefitsEligibility expression set uses business rules to determine potential eligibility while the APSEXPCloudBenefitsListParent flex card displays the list of benefits for which the citizen is potentially eligible for.

Eligibility Assessment Flow

The Eligibility Assessment Flow is a critical feature that allows organisations to define and manage eligibility criteria for various public benefits programs.

By automating the eligibility assessment, organisations can significantly enhance the efficiency and accuracy of benefit distribution. This not only speeds up the process but also ensures that resources are allocated to those who truly need them. The streamlined process helps in reducing administrative overhead and allows caseworkers to focus on more complex cases that may require human intervention.

Automated Eligibility Determinations

The Automated Eligibility Determinations feature leverages the Business Rules Engine to automate the process of determining benefit eligibility and calculating benefit amounts. By setting up a decision matrix and expression set, the system can automatically assess an applicant's eligibility based on predefined criteria and calculate the appropriate benefit amount. This automation reduces the likelihood of manual errors and ensures a consistent application of rules across all cases.

This feature accelerates the processing time for applications, allowing organisations to handle a larger volume of applications more efficiently. It also provides a transparent and auditable process, as the decision-making criteria and calculations are clearly defined and consistently applied. This can help in building trust with citizens, as they can be assured that the process is fair and unbiased.

The Business Rules Engine comprises a suite of services, components, and objects that perform calculations and automate policy decisions. For example, use Business Rules Engine to automatically determine whether applicants qualify for unemployment insurance, small business loans, business licenses, or other public sector programs and services. Create business rules to automate the calculation of qualified benefit amounts, application fees, or other amounts based on input criteria. The key elements of Business Rules Engine are expression sets and decision matrices.

Expression Sets

Expression sets perform a series of calculations using matrix lookups and user-defined variables and constants. Specifically, expression sets call decision matrices, which are tables that allow you to implement complex rules in a systematic, readable way.

Decision Matrices

Decision matrices match input values to a table row and return the row's output values. Expression sets and decision matrices accept JSON input from, and return JSON output to, OmniScripts.

Optionally, after you set up your business rule, use Decision Explainer to gain insights into the results of automatic calculations.

Salesforce provides integration procedures and data raptors to assist in calculating eligibility. If your organisation is currently using an external business rules engine, you can continue to use that rules engine and integrate it with Salesforce.

Benefit Management Discovery Framework Template

The Benefit Management Discovery Framework Template (version v5) offers a structured and comprehensive approach to setting up and managing benefit programs. This template provides a blueprint for agencies to ensure that all necessary components are in place for smooth operations. It includes guidelines and best practices for defining program parameters, eligibility criteria, benefit calculations, and more.

By using this template, organisations can ensure that their benefit programs are well-organised and efficiently managed. It helps in standardising processes across different programs, making it easier to maintain consistency and quality. Additionally, the template can be customised to meet the specific needs of different programs, providing flexibility while maintaining a structured approach.

Benefit Application Intake

The Benefit Application Intake process is designed to streamline the collection of applicant information. Leveraging Discovery Framework assessment questions and OmniScripts, this process gathers all necessary data from applicants and stores it in Salesforce objects using Omnistudio Integration Procedures and Data Mappers. This automation ensures that the data collection process is accurate and efficient, reducing the likelihood of errors and omissions.

By automating the intake process, organisations can handle a larger volume of applications with greater efficiency. This not only speeds up the application process but also ensures that all relevant information is captured and stored in a structured manner. This data can then be easily accessed and used for further processing, such as eligibility assessment and benefit calculation.

Through the self-service portal, applicants can view their application status, view comments and provide changes as needed during the application process. Caseworkers can also return applications to applicants to make updates if that is part of the business process.

Agentforce Public Sector includes delivered OmniScripts, flex cards, integration procedures, and data raptors, to deliver a seamless benefit application process.

Benefit Assignment and Disbursement

The Benefit Assignment and Disbursement feature enables organisations to assign and disburse benefits to eligible applicants using automated flows. This ensures that benefits are distributed accurately and timely, enhancing the overall efficiency of the benefit management process. By automating the assignment and disbursement of benefits, agencies can reduce the likelihood of errors and ensure that resources are allocated to those who need them most.

This feature also provides a transparent and auditable process, as the criteria for benefit assignment and disbursement are clearly defined and consistently applied. This can help in building trust with citizens, as they can be assured that the process is fair and unbiased. Additionally, the automation of benefit

disbursement can help in reducing administrative overhead, allowing organisations to focus on more strategic tasks.

Benefit Management Data Model

Benefit management extends your Salesforce license to include access to benefit, social program management and provider management objects and components. The Benefit Management data model is designed to help you support and manage the entire benefit lifecycle. Manage applications and eligibility determination with the business rules engine and deliver OmniScripts, change of circumstance, redetermination, and more. The data model supports the work of everyone in your institution, including case managers, case workers, and Salesforce admins.

Agentforce Capabilities

With Agentforce Public Sector powered by Agentforce, Salesforce increases operational efficiency with AI proactive agents and automation, unify and harmonise data on a compliance-enabled cloud, and innovate faster with a low code application platform for government.

The AI dedicated Public Sector agents help augment human workers in their tasks that typically take a long time to find information such as application information which may be spread out across the case management. Caseworkers need to understand the application information and details to help determine eligibility, services, benefits and next steps.

With the help of generative AI built into benefit management workflows, you can give your caseworkers contextual insights to make informed decisions, improve benefit delivery, and quickly respond to citizens' queries--this will boost employee morale and productivity, and improve citizen experience and satisfaction.

Streamline Benefit Management. Create a historical overview of a benefit application for your caseworkers by using Generative AI. Caseworkers in a summary view are able to see the key dates of submission, evaluation, eligibility determination, and recertification in one place. What typically required navigating to multiple screens to piece together this information. It also shows the application's status and outcome, and a recap of the assessments related to the application. Caseworkers can use these insights to make informed decisions, eligibility qualification, missing information, next steps and quickly resolve constituent queries about their applications.

Help Caseworkers Quickly Identify Benefit Application Changes. Caseworkers understand that collecting the necessary information on the application and the accuracy of the information is critical to an accurate eligibility determination. Caseworkers spend copious amounts of time going back and forth between the government agency and citizen collecting missing information and validating information. Caseworkers use Generative AI to compare the information provided by the citizen in the assessment versions associated with the application. By highlighting the changes in the citizen's information the caseworker can quickly identify the impact on their benefit eligibility and assign or adjust their benefit entitlement.

Provider Management

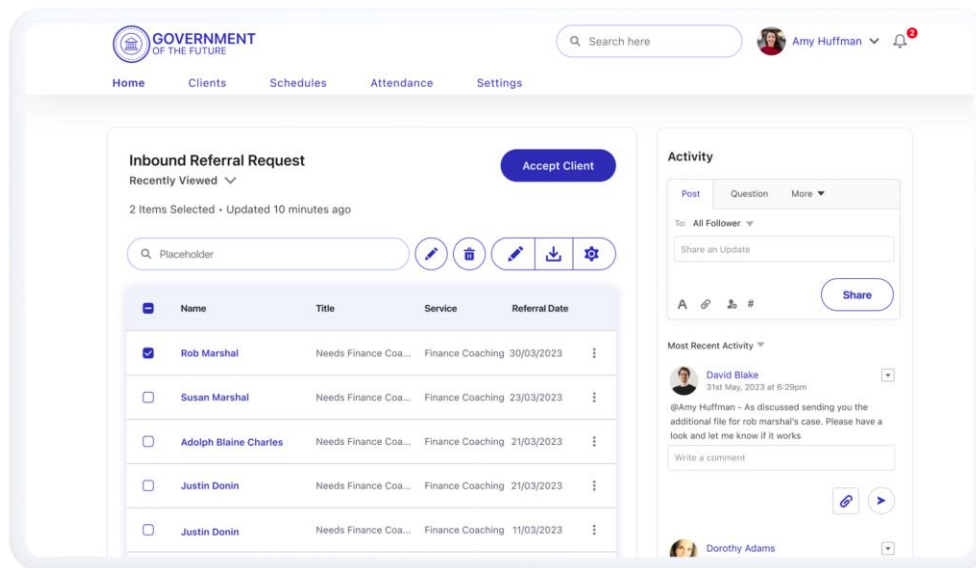
Agentforce Public Sector for Provider Management offers a comprehensive framework designed to streamline the management and collaboration with service providers. This solution captures detailed information about service providers, their facilities, and their specialties, ensuring that organisations can map the benefits and services administered to citizens accurately. By aligning the services needed by citizens with the specialties offered by providers, organisations can ensure that the right services are delivered efficiently.

A key functionality of Provider Management is its robust search capability. This feature allows caseworkers to search for providers and facilities based on specific criteria, such as provider type, required information, and relevant actions. The criteria-based search and filter features enable caseworkers to find suitable providers quickly and efficiently, ensuring that they have the necessary tools to make informed decisions about service delivery.

Provider Management also includes a guided referral flow, which streamlines the process of sharing relevant information with providers. This flow ensures that providers receive all necessary documentation and details to deliver services effectively. Additionally, the solution supports the creation of an Experience Cloud site where certified providers can process referral requests, manage service delivery, and collaborate transparently with agencies. This enhances the overall collaboration between agencies and service providers, promoting efficient service delivery.

To further support collaboration, Provider Management includes features for authorising referrals and approving benefit schedules. Caseworkers can use the Authorise Referral for Provider flow to update a referral's authorisation status and share benefit assignment records with provider users. This ensures that providers can track service delivery as benefit disbursements against the benefit assignment, promoting transparency and efficiency in service delivery.

Overall, Agentforce Public Sector for Provider Management provides a robust set of tools and functionalities to manage provider networks, streamline referral processes, and enhance collaboration between agencies and service providers. This solution is essential for organisations looking to improve service delivery and ensure that citizens receive the support they need.



Provider Management: Connect program participants to the right service providers on a single platform

Features and Benefits of Agentforce Public Sector Provider Management

Provider Management in Agentforce Public Sector offers a comprehensive platform designed to efficiently manage service providers, ensuring that organisations can deliver high-quality services to their citizens. Below is an overview of the key features and benefits of this solution.

Manage Providers at Scale

Provider Management enables organisations to efficiently recruit, onboard, and manage service providers on a scalable platform. With out-of-the-box data models and workflows, organisations can quickly grow and manage their provider networks. The pre-built nature of the platform allows for rapid deployment, while low-code and no-code tools offer the flexibility to configure the system to meet specific needs. This ensures that organisations can handle an increasing number of providers without compromising on efficiency or effectiveness.

Find the Right Provider Faster

Connecting citizens to the right service providers is streamlined with contextual search capabilities embedded directly within the citizens record. Caseworkers can easily identify providers that meet specific criteria, such as proximity and operating hours. Guided referral workflows and automation facilitate the quick and secure sharing of information with providers, ensuring that citizens are matched with the most suitable services promptly. This feature significantly reduces the time and effort required to find and connect with the right providers.

Deliver End-to-End Services

The platform offers flexible case management tools and data insights that help staff manage the entire service delivery process. From tracking progress to ensuring that citizens receive the necessary services, these tools provide comprehensive oversight. This end-to-end management capability ensures that all

aspects of service delivery are monitored and optimised, leading to better outcomes for citizens. Staff can easily track and manage each step of the service delivery process, ensuring that no detail is overlooked.

Unlock Self-Service and Transparency

Providers have access to a digital self-service portal where they can manage referrals, track progress, and communicate with the agency. This portal fosters greater transparency and collaboration between organisations and providers. By enabling providers to handle these tasks independently, the platform reduces administrative burdens on staff and enhances the overall efficiency of service delivery. Additionally, the self-service portal allows for real-time tracking of progress and outcomes, providing valuable insights that can be used to improve service delivery and ensure accountability.

In summary, Agentforce Public Sector for Provider Management offers a comprehensive platform that supports the efficient management of provider networks, facilitates the quick identification and connection of citizens to the right providers, ensures end-to-end service delivery, and promotes transparency and self-service for providers.

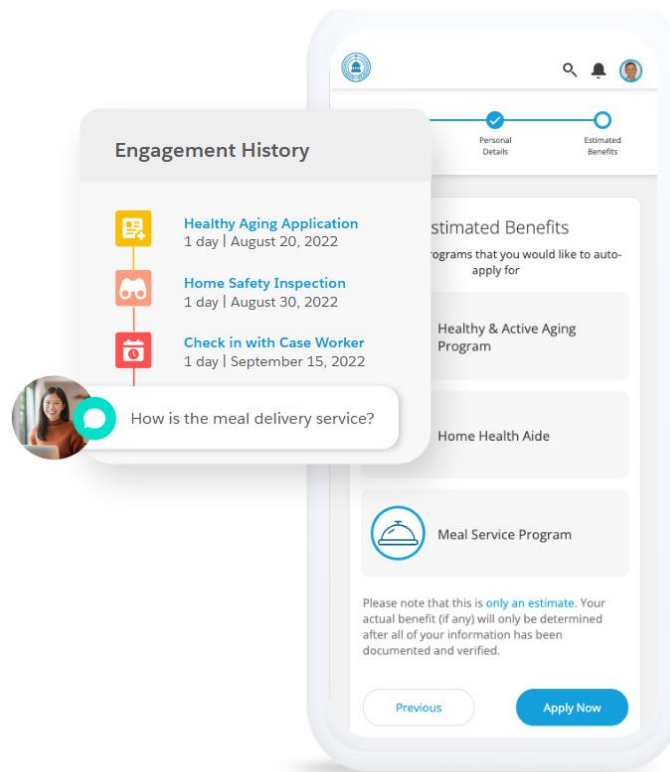
Social Program Management

Agentforce Public Sector Social Program Management is a comprehensive platform designed to streamline and enhance the management of social programs. It provides a structured approach to guide case workers through the entire lifecycle of a case, from initial intake to achieving desired outcomes. This system ensures that all relevant information regarding requests, investigations, benefits, and goals is consolidated into a single source of truth, facilitating better decision-making and more efficient case management.

One of the key functionalities of this solution is its ability to accelerate the intake process through automation. By automating case assignments and eligibility determinations, the platform reduces the administrative burden on case workers, allowing them to focus more on citizen interactions and less on paperwork. This automation not only speeds up the process but also ensures consistency and accuracy in case handling, which is crucial for maintaining the integrity of social programs.

In addition to automating intake processes, Agentforce Public Sector Social Program Management also digitises case documentation. This feature allows case workers to capture and share real-time case details, even when they are offline. The ability to access and update case information on the go ensures that case workers have the most up-to-date information at their fingertips, which is essential for making informed decisions and providing timely support to citizens.

Furthermore, the platform leverages data insights to power better outcomes. By surfacing relationships between people, events, and services, it helps case workers identify patterns and connections that might not be immediately apparent. These insights can inform more effective intervention strategies and enable a more holistic approach to case management. Overall, Agentforce Public Sector Social Program Management provides the tools and capabilities needed to manage social programs more efficiently and effectively, ultimately leading to better outcomes for the communities served.



Navigate complex service scenarios for better outcomes

Features and Benefits of Agentforce Public Sector Social Program Management

Agentforce Public Sector Social Program Management is designed to streamline and enhance the administration of social programs. This comprehensive solution offers a range of features that facilitate efficient case management, improve service delivery, and ensure compliance with regulatory requirements. By leveraging advanced data analytics and automation, it enables public sector organisations to better serve their communities, optimise resource allocation, and achieve measurable outcomes. The following sections detail the key features and benefits that make this solution an essential tool for modern social program management.

Efficiently Deliver Holistic Care

Personalise your approach and spend more time on what matters most with tools purpose-built for case managers. Social Program Management in Agentforce Public Sector allows caseworkers to create individualised care plans tailored to the unique strengths, weaknesses, needs, and circumstances of their clients. This personalised approach ensures that each citizen receives the specific support they need to achieve positive outcomes. By focusing on holistic care, caseworkers can address the comprehensive needs of their clients, leading to improved well-being and more successful program outcomes.

Give Caseworkers a Complete View

Use secure, scalable, and reusable integrations to unify data from legacy systems and external applications. This comprehensive view enables caseworkers to access all relevant information about a citizen in one place, facilitating better decision-making and more effective case management. By having a complete picture, caseworkers can provide more accurate and timely support to those in need. This

unified data approach not only enhances the efficiency of caseworkers but also ensures that no critical information is overlooked, leading to more informed and effective interventions.

Help Constituents Stay on Track

Automate and personalise outreach with proactive communication and engaging notifications. Program managers can build modern journeys and experiences that engage the people they are serving. Automatic email and text notifications help citizens stay on track with their care plans and increase awareness of available services. This proactive approach ensures that citizens are consistently informed and supported throughout their engagement with social programs. By keeping citizens engaged and informed, agencies can improve adherence to care plans and enhance the overall effectiveness of their programs.

Enable Secure Information Sharing

Advance caseworker and interagency collaboration to team up and confront citizen challenges. The platform brings secure and compliant collaboration to the public sector, both inside your organisation and with external, interagency partners. This replaces information silos with a culture of knowledge-sharing, bringing teams together to address citizen needs more effectively. Secure information sharing ensures that sensitive data is protected while enabling seamless collaboration across different organisations and departments. This collaborative approach enhances the ability to provide comprehensive support to citizens, leveraging the expertise and resources of multiple organisations.

Comprehensive Case Management

Social Program Management comprises a suite of objects and guided flows that help organisations fulfill their mission to serve citizens in need. Programs and benefits are the cornerstone of this solution, allowing organisations to define high-level programs that support the social, physical, and emotional well-being of their citizens. Case Referral Intake, Complaint Management, and Incident Tracking are key features that streamline the intake and assessment processes, ensuring that citizens receive the appropriate support and benefits. This comprehensive case management approach ensures that all aspects of a citizen's needs are addressed, leading to better overall outcomes.

Dynamic Assessments and Care Plans

Caseworkers use dynamic assessments to evaluate the circumstances of their clients and create personalised care plans. These care plans include comprehensive long-term or intermediary goals and concrete action plans to help clients achieve positive outcomes. By using templates, caseworkers can standardise their approach while still tailoring care plans to the unique needs of each individual. This ensures that all clients receive consistent and effective support. Dynamic assessments and personalised care plans are critical for addressing the unique needs of each citizen, leading to more effective and targeted interventions.

Care plans include a combination of benefits, goals, and tasks that you assign to citizens to provide them a path towards improving their situation. Care plans make it easy for caseworkers to track each citizen's progress as they complete tasks and reach goals. You can configure care plans for individuals or groups of citizens, and you can assign each care plan component to specific participants or to the entire group.

Care plan templates are predefined, reusable sets of components for addressing common issues that caseworkers encounter. When you apply a care plan template to a new care plan, all of the template's

goals, benefits, and tasks appear in the new plan. Add, remove, or modify components to address the unique needs of each citizen.

Care plan templates are a great way streamline care for citizens who experience common issues, for example:

- Poverty
- Homelessness
- Disability
- Unemployment
- Food insecurity
- Reentry to the community after a prison sentence

Child Welfare Programs

Social Program Management supports child welfare initiatives by providing tools to create programs, define goals, and assign benefits. For example, a program named Child Welfare can be created with goals such as "Unified Household" and benefits like "Family Counseling" and "Positive Parenting Workshop". These programs and benefits are designed to ensure that children have safe, permanent homes and promote the well-being of children and families. By focusing on child welfare, organisations can provide targeted support to vulnerable children and their families, ensuring their safety and well-being.

Complaint Management and Incident Tracking

Support vulnerable members of your community by using guided flows and dynamic assessments to respond to reports of health, safety, and well-being concerns. Citizens can file complaints online, and intake agents can capture complaints via phone or in-person. Caseworkers review complaints, conduct dynamic assessments, and determine follow-up actions. This feature ensures that all complaints are handled efficiently and that appropriate support is provided to improve the citizens' circumstances. Effective complaint management and incident tracking are essential for addressing and resolving issues promptly, ensuring the safety and well-being of citizens.

Program and Case Management

Deliver programs that support the health and well-being of individuals, families, and students. Respond to concerns reported by community members, process referral requests, and use care plans to support individuals through life challenges to positive, successful outcomes. This comprehensive approach ensures that all aspects of a citizen's needs are addressed, leading to better overall outcomes. By providing a holistic approach to program and case management, organisations can ensure that citizens receive the support they need to overcome challenges and achieve positive outcomes.

Outcome Management

Use Outcome Management with Agentforce Public Sector to collect data, track progress, and evaluate the effectiveness of social programs. For example, use Outcome Management to evaluate the impact of a particular service program on overall food security in the community. Then, adjust the program to better deliver the assistance based on the data.

After you configure programs, goals, and benefits, the caseworkers at your agency can use these components in care plans to provide tailored solutions for their clients.

Agentforce Capabilities

With Agentforce, Salesforce increases operational efficiency with AI proactive agents and automation, unify and harmonise data on a compliance-enabled cloud, and innovate faster with a low code application platform for government.

The AI dedicated Public Sector agents will not only impact and transform the efficiency of Public Sector agencies, especially in Social Care, but also reshape the access to Public Sector for citizens, bridging the gap between government and citizens and contributing to a more equitable world.

By enabling AI agents to assist citizens with their inquiries, requests, complaints or personal needs while guiding them through the necessary steps.

With Agentforce, Salesforce also further assists agency employees increasing operational efficiency with proactive agents who can answer complex questions and take adequate actions, unify and harmonise data on a compliance-enabled cloud.

Specific uses cases in this domain include, amongst others, complaint filing, complaint intake, prioritisation, categorisation, deconfliction, investigation case creation and evidence management.

- **Complaint filing Agent**
 - An external user who would want to complain about a particular business/license owner, this agent could walk through the process and in certain cases deflect the creation of a complaint/case if the complaint isn't necessary or a complaint has already been created. Provide online support to citizens to help them file complaints accurately and ensure jurisdictional alignment and information completeness.
- **Complaint Management Agent**
 - Automate prioritisation and categorisation: Score complaints based on formal and qualitative criteria to prioritise complaints by severity and assign them to the appropriate category for resolution.
 - Deconflict complaints: Identify similar complaints and group them into unified case groups to deconflict and streamline resolution efforts.
 - Improve accuracy and thoroughness: Strengthen complaint management processes by analysing evidence and identifying violations, allowing for greater focus on critical issues.
 - Ensure timely responses: Offer real-time updates on complaint status and resolutions to ensure prompt and transparent communication with complainants.
 - Create investigation cases when needed.
- **Evidence Management Agent**
 - Search, stream, categorise, assess evidence.

Talent Recruitment Management

Agentforce Public Sector Talent Recruitment Management is a comprehensive tool designed to streamline the hiring process for government agencies. This solution is tailored to address the unique challenges faced by public sector organisations, such as lengthy hiring processes, stringent compliance requirements, and the necessity for cross-departmental collaboration. By leveraging advanced technology, it enables these organisations to compete effectively for top talent, akin to the efficiency typically seen in the private sector.

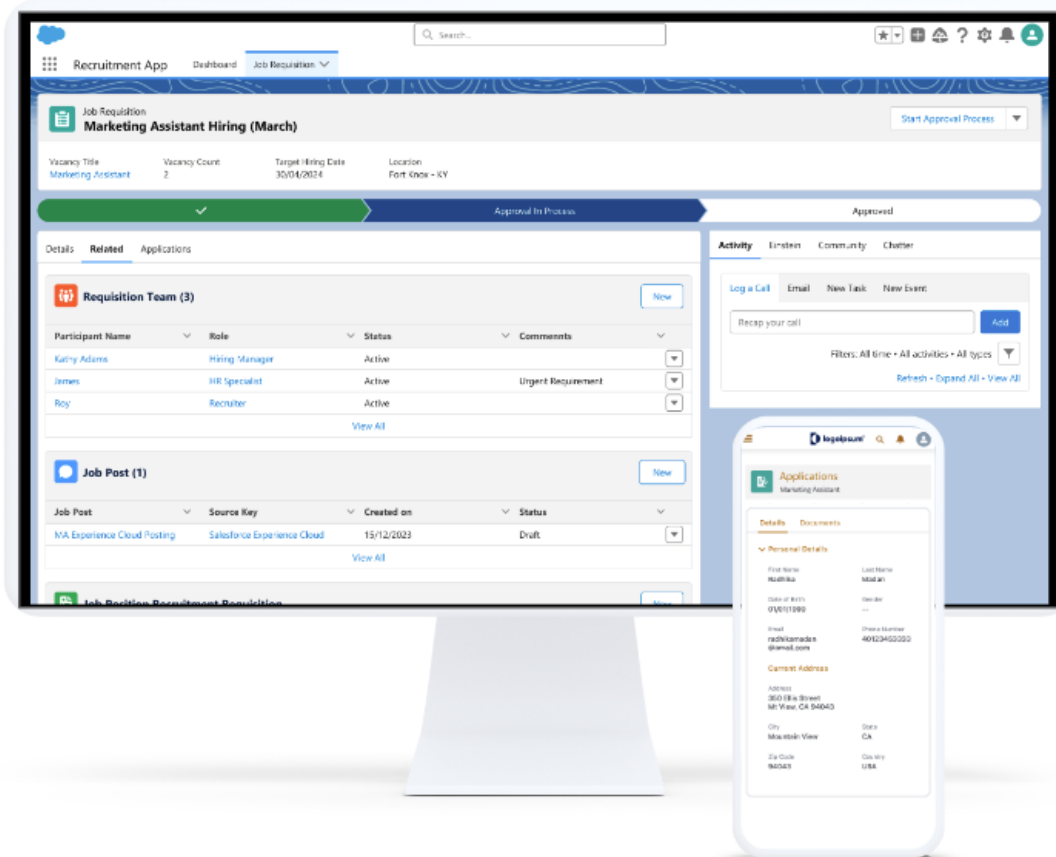
One of the primary functions of Talent Recruitment Management is its ability to significantly reduce the time required to hire top candidates. The system provides real-time applicant tracking, collaborative hiring efforts, and automated notifications. These features help keep organisations staffed efficiently, reducing the administrative workload and boosting morale among existing employees by ensuring that critical positions are filled promptly.

The solution also excels in connecting recruiting efforts across different departments within an organisation. It offers a centralised hiring hub where job postings, applications, and candidate evaluations are easily accessible to all relevant parties. This interconnected approach ensures that everyone involved in the hiring process is on the same page, facilitating smoother and more efficient recruitment operations. Candidate retention rates are another focus area for Talent Recruitment Management. The system provides an intuitive and transparent view of the application progress through a state-of-the-art applicant portal. This keeps top-choice candidates engaged and connected to the agency, increasing the likelihood that they will remain interested throughout the hiring process and ultimately accept job offers.

Data security is a critical concern for public sector organisations, and Talent Recruitment Management addresses this with robust features for managing candidate data. The system ensures compliance with privacy and ethics standards by offering secure document uploads and controlled access to sensitive candidate information. This helps organisations manage personal identifiable information (PII) responsibly and maintain the trust of their applicants.

The solution also enhances productivity by automating various workflows and centralising hiring information. Features such as dynamic applicant tracking, live status updates, and automated notifications help reduce the time-to-fill for critical positions. This allows HR teams to focus on more strategic tasks rather than getting bogged down by administrative details.

Overall, Agentforce Public Sector Talent Recruitment Management provides a comprehensive and efficient approach to hiring in the public sector. By leveraging technology to streamline processes, enhance collaboration, and ensure data security, it helps government organisations attract and retain top talent while maintaining high standards of compliance and efficiency.



Compete for top public sector talent with speed and efficiency

Features and Benefits of Agentforce Public Sector Talent Recruitment Management

In the competitive landscape of public sector employment, attracting and retaining top talent is crucial. Our Talent Recruitment Management solution is designed to streamline and enhance the recruitment process, ensuring that agencies can efficiently manage job postings, candidate screenings, and job offers. This comprehensive solution is divided into three main components: The Talent Recruitment App, The Employee Portal, and The Applicant Portal. Each component is tailored to meet the specific needs of Human Resources staff, hiring managers, and job seekers, respectively.

The Talent Recruitment App

The Talent Recruitment App is the backbone of our Talent Recruitment Management solution, primarily used by Human Resources staff and recruiters. This app simplifies the administrative side of recruitment, allowing HR professionals to manage positions, requisitions, and job postings with ease. By centralising these tasks, the app ensures that all job postings are consistent, accurate, and up-to-date, reducing the risk of errors and miscommunication. This streamlined process not only saves time but also enhances the overall efficiency of the recruitment process.

In addition to managing job postings, the Talent Recruitment App provides robust tools for reviewing applications, screening candidates, and making selections. Recruiters can easily assess candidate qualifications, conduct initial screenings, and shortlist potential hires. The app also facilitates the extension of tentative and final job offers, ensuring that the entire recruitment process is seamless and

well-coordinated. Furthermore, the app includes features for vetting candidates, such as background checks and reference verifications, ensuring that only the most qualified individuals are considered for positions.

The Employee Portal

The Employee Portal is designed specifically for hiring managers and interviewers, providing them with the tools they need to approve job postings and evaluate candidates. This portal allows hiring managers to review and approve requisitions and job postings, ensuring that all positions are accurately represented and aligned with the organisation's needs. By streamlining the approval process, the Employee Portal helps to eliminate bottlenecks and ensures that job postings are published in a timely manner.

Once job postings are live, the Employee Portal becomes an essential tool for evaluating candidates. Hiring managers and interviewers can use the portal to review candidate profiles, assess interview performance, and make informed decisions about potential hires. The portal's intuitive interface and comprehensive evaluation tools make it easy for hiring managers to compare candidates and select the best fit for their team. This collaborative approach ensures that all stakeholders are involved in the decision-making process, leading to more informed and effective hiring decisions.

The Applicant Portal

The Applicant Portal is the real differentiator in our Talent Recruitment Management solution, providing job seekers with a user-friendly platform to search for jobs, learn about careers, and apply for positions. This portal empowers job seekers by giving them access to a wealth of information about career opportunities within the public sector. Users can explore different career paths, learn about the qualifications and skills required for various roles, and gain insights into the organisation's culture and values.

In addition to providing valuable career information, the Applicant Portal simplifies the job application process. Job seekers can easily search for open positions, submit applications, and track the status of their applications online. The portal also allows users to take follow-up actions, such as scheduling interviews or submitting additional documentation, ensuring that they remain engaged and informed throughout the recruitment process. By providing a transparent and efficient application experience, the Applicant Portal helps to attract top talent and improve candidate satisfaction.

In summary, our Talent Recruitment Management solution offers a comprehensive and integrated approach to public sector recruitment. By leveraging the capabilities of the Talent Recruitment App, Employee Portal, and Applicant Portal, organisations can streamline their recruitment processes, enhance collaboration, and attract the best candidates. This solution not only improves the efficiency and effectiveness of recruitment efforts but also ensures a positive experience for all stakeholders involved.

Agentforce Capabilities

Agentforce can significantly enhance the Salesforce Talent Recruitment process by providing a more streamlined and efficient approach to managing recruitment activities. With Agentforce, recruiters and HR specialists can leverage advanced features to create, manage, and optimise recruitment campaigns with greater precision and customisation. This tool allows for deeper integration of marketing efforts with recruitment strategies, ensuring that job postings and campaigns are not only effective but also aligned with the organisation's branding and messaging.

Additionally, Agentforce offers robust capabilities for creating and refining content, such as job descriptions and recruitment materials, making it easier to maintain consistency and quality across all communications. By utilising Agentforce, organisations can improve their overall recruitment workflow, from initial job posting to final candidate selection, resulting in a more engaging and efficient hiring process.

Investigative Case Management

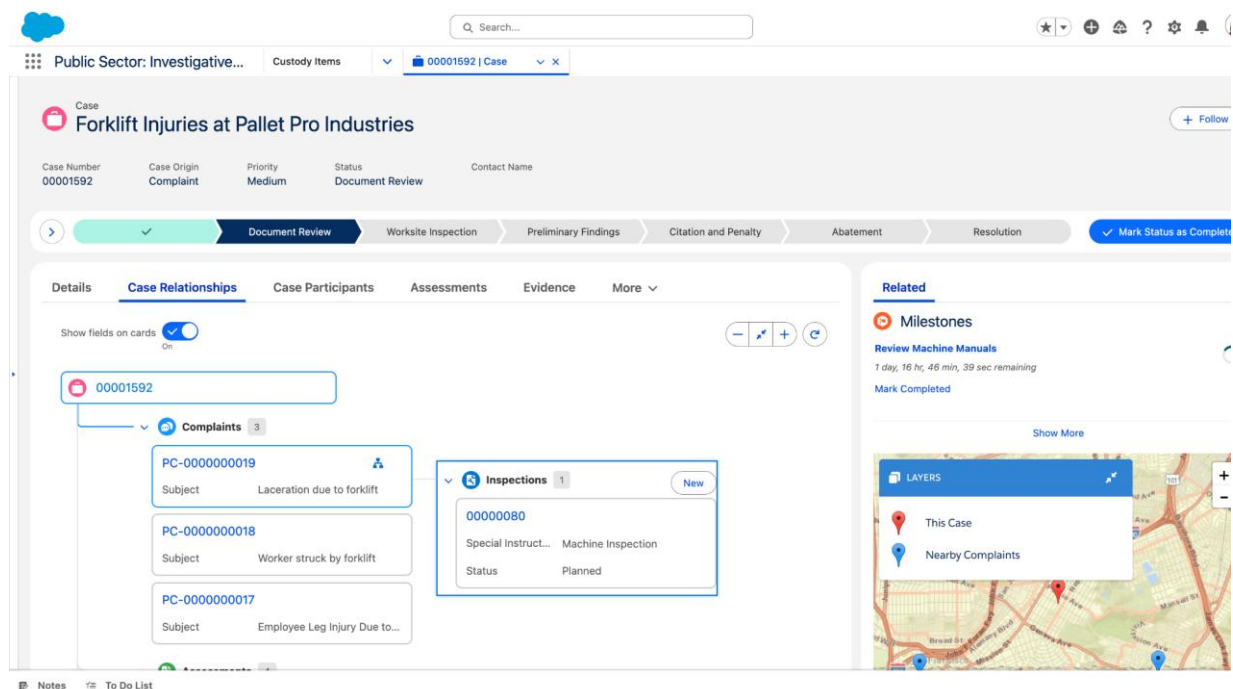
Agentforce Public Sector Investigative Case Management is designed to streamline the handling of complex cases for investigative agencies. This system provides a unified view of all investigation details, including people, entities, relationships, and documentation. By consolidating this information into a single platform, it simplifies navigation through cases and reduces administrative tasks through intuitive tools and automated workflows. This allows investigators to focus more on the investigation itself rather than on managing disparate pieces of information.

One of the key capabilities of Investigative Case Management is its ability to expedite case resolution. The system facilitates real-time collaboration within and across agencies, which is crucial for timely and effective investigations. Guided flows and automated task assignments help reduce the need for follow-ups, minimise manual errors, and close process gaps. This ensures a smoother and quicker path to resolution, which is essential when time is of the essence.

Accuracy and thoroughness are critical in any investigation, and this system enhances operational integrity and rigor. It provides comprehensive case overviews and easy evidence tracking, allowing for seamless collaboration across organisation lines. The use of AI to pinpoint rule violations and identify necessary evidence ensures that no detail is overlooked. This capability is particularly important for maintaining the accuracy and thoroughness required in investigative work.

Security and evidence-driven decision-making are also paramount in investigations. The system helps capture all necessary documentation and understand the relationships involved in each case. It ensures a robust chain of custody for digital evidence and supports compliant data sharing within a secure and adaptable environment. This is crucial for making informed, evidence-based decisions while maintaining the integrity and security of the investigation.

By integrating these capabilities, Agentforce Public Sector Investigative Case Management empowers agencies to handle investigations more effectively from the initial complaint all the way to resolution. It ensures that processes are efficient, accurate, and secure, ultimately enhancing the overall effectiveness of investigative work.



Enhance investigation effectiveness from complaint to resolution

Features and Benefits for Agentforce Public Sector Investigative Case Management

Case Management related capabilities

Agentforce Public Sector Investigative Case Management offers a robust platform for comprehensive case tracking and management. This feature allows organisations to meticulously document every aspect of an investigation, from initial reports to final resolutions. By centralising all case-related information, the system ensures that investigators have immediate access to critical data, which enhances decision-making and accelerates the investigative process. The platform's intuitive interface makes it easy for users to input, update, and retrieve case information, reducing the administrative burden and allowing investigators to focus more on their core responsibilities.

Moreover, the comprehensive case tracking capability supports collaboration among multiple stakeholders. Investigators, supervisors, and external partners can seamlessly share information and updates, ensuring that everyone involved in a case is on the same page. This collaborative approach not only improves the efficiency of investigations but also enhances the accuracy and reliability of the information being processed. By fostering a more coordinated effort, the system helps public sector agencies achieve better outcomes in their investigative work.

The solution includes multiple steps to manage the investigative case process: Intake and Preliminary Assessment, Investigation, Proceeding and Compliance phase. Depending on the specific use case, customers can select and customise the relevant components accordingly.

For streamlining the **complaint intake process**, Agentforce Public Sector includes a complaint flow template to facilitate the submission of complaints, along with features to realise a preliminary assessment of the complaint as well as its severity level. You can use the complaint intake template to

accelerate case intake with digital filing, Reduce delays and comply with intake requirements with guided flows, allow complainants to attach supporting files as evidence and confirm case intake for tracking. Additionally, the proceeding advisor based on the business rules engine provides guidance on prioritisation, selecting the appropriate course of action. If this preliminary examination uncovers reasons to believe that an offence may have been committed, a formal inquiry may be commenced and an investigation is triggered.

During the **investigation phase**, emphasis is first placed identifying case participants and exchanging information. The solution offers visualisations to present a comprehensive overview of a case participant, who may have been engaged in numerous prior complaints or cases, possibly in playing varying roles. Additionally, it provides a cross-sectional perspective of the investigative case, linking all pertinent elements together for a cohesive understanding. In addition, understanding the relationships between various stakeholders is crucial. These relationships may evolve over time, necessitating thorough mapping and lifecycle management provided by the solution.

Agentforce Public Sector offers capabilities for field deployment of investigators and conducting interviews.

Evidence management capabilities are provided to collect and share pieces of evidence, evaluate the relevance and qualification of evidence for proceedings, as well as to maintain custody chain integrity. Evidence management capabilities support investigators based on the following capabilities: evidence collection flows, dynamic assessments of the evidence for qualification and categorisation, and chain of custody. Based on these capabilities, you can collect and track physical and digital evidence, tie the evidence to a regulatory code violation, case or case proceedings. Using the Dynamic assessment framework related to evidence, you can assess, categorise and prepare evidence for sharing.

The case assessment framework will enable agencies to determine the most appropriate course of action, ensuring adherence to policy rules.

An investigative case may be resolved in multiple ways:

- **Court Case Proceeding:** Information regarding case proceedings will be documented to monitor the court's progression and to record outcomes such as fines, periods of detention, probation, deportations, placements, and more. In this case, you can manage proceedings information such as participants, locations, etc. and proceeding results in ICM. You can benefit from dedicated workflows to efficiently update case records and automatically add participants to new proceedings as well as related information to proceeding records. You can track participant details, understand participant roles, type and status for a case proceedings.
- **Internal Case Resolution:** This can serve to address issues outside of the judicial system, potentially utilising internal boards, mediation, arbitration processes, and other methods for resolution.
- **Discontinuance or Referral to another Agency:** If the agency is of the opinion that the matter does not request further action from the agency, it may formally discontinue the inquiry or refer the case to another agency.

Finally, certain use cases may benefit from support plans, such as victim services, anti-recidivism programs which are seamlessly integrated into the solution.

Advanced Analytics and Reporting

The advanced analytics and reporting feature of Agentforce Public Sector Investigative Case Management empowers organisations with the ability to derive actionable insights from their data. Through sophisticated analytical tools, users can identify patterns, trends, and anomalies that might otherwise go unnoticed. This capability is particularly valuable in complex investigations where understanding the broader context can be crucial to solving cases. By leveraging data analytics, organisations can make more informed decisions, allocate resources more effectively, and ultimately improve their investigative outcomes.

In addition to analytics, the platform offers comprehensive reporting capabilities that enable users to generate detailed reports with ease. These reports can be customised to meet the specific needs of different stakeholders, whether they are internal team members, external partners, or oversight bodies. The ability to produce accurate and timely reports enhances transparency and accountability, which are critical components of public sector operations. Furthermore, the insights gained from these reports can inform policy decisions and strategic planning, helping organisations to continuously improve their investigative processes.

Secure and Compliant Data Management

Security and compliance are paramount in public sector investigations, and Agentforce Public Sector Investigative Case Management excels in these areas. The platform is designed with robust security measures to protect sensitive information from unauthorised access and breaches. This includes encryption, access controls, and regular security audits to ensure that data remains secure at all times. By safeguarding investigative data, the system helps agencies maintain the trust of the public and other stakeholders, which is essential for effective law enforcement and regulatory activities.

Compliance with legal and regulatory requirements is another critical benefit of this feature. The platform is built to adhere to various standards and regulations that govern data management in the public sector. This includes maintaining detailed audit trails, ensuring data integrity, and facilitating compliance with data retention policies. By automating many of these compliance-related tasks, the system reduces the risk of human error and ensures that agencies remain in good standing with regulatory bodies. This not only protects the agency from potential legal issues but also enhances its reputation as a responsible and trustworthy entity.

Enhanced Communication and Collaboration Tools

Effective communication and collaboration are key to successful investigations, and Agentforce Public Sector Investigative Case Management provides a suite of tools to facilitate these processes. The platform includes features such as secure messaging, shared workspaces, and real-time notifications, which enable investigators to communicate and collaborate seamlessly. These tools help to break down silos and ensure that all team members are informed and engaged throughout the investigative process. By improving communication, the system enhances the overall efficiency and effectiveness of investigations.

In addition to internal communication, the platform also supports collaboration with external partners, such as other government organisations, law enforcement bodies, and community organisations. This is particularly important in cases that span multiple jurisdictions or require input from various stakeholders.

The ability to securely share information and coordinate efforts with external partners ensures a more comprehensive and cohesive approach to investigations. This collaborative capability not only improves the chances of resolving cases successfully but also strengthens relationships and trust between different entities involved in public sector work.

Scalability and Customisation

Agentforce Public Sector Investigative Case Management is designed to be scalable and customisable, making it suitable for agencies of all sizes and types. Whether an agency is handling a small number of cases or managing a large volume of complex investigations, the platform can be tailored to meet its specific needs. This scalability ensures that the system can grow and adapt alongside the agency, providing long-term value and support. Customisation options allow agencies to configure the platform to align with their unique workflows, processes, and requirements, ensuring that it fits seamlessly into their existing operations.

Furthermore, the ability to customise the platform extends to the user interface and experience. Agencies can create custom dashboards, forms, and workflows that reflect their specific investigative processes and priorities. This level of personalisation enhances user adoption and satisfaction, as the system feels intuitive and relevant to their daily tasks. By offering a flexible and adaptable solution, Agentforce Public Sector Investigative Case Management ensures that agencies can optimise their investigative processes and achieve better outcomes, regardless of their size or scope.

Agentforce Capabilities

With Agentforce, Salesforce increases operational efficiency with AI proactive agents and automation, unify and harmonise data on a compliance-enabled cloud, and innovate faster with a low code application platform for government.

Elevate your workflows with Agentforce AI agents. Automate repetitive tasks for your employees. Help them quickly find information and learn about constituent needs. Give them insights into policies, programs, and services to help them make faster, informed decisions. Boost their morale and productivity for improved service delivery and a more positive constituent experience.

The AI dedicated Public Sector agents will not only impact and transform the efficiency of Public Sector agencies, especially in Investigations, but also reshape the access to Public Sector for citizens, bridging the gap between government and citizens and contributing to a more equitable world.

Agentforce AI agents assist citizens with their inquiries and requests while guiding them through the necessary steps of the complaints, investigations and legal processes. With AgentForce, Salesforce also further assists agency employees increasing operational efficiency with proactive agents who can answer complex questions and take adequate actions, unify and harmonise data on a compliance-enabled cloud.

Specific uses cases in this domain include amongst others complaint filing, complaint intake, prioritisation, categorisation, deconfliction, investigation case creation and evidence management.

Complaint Intake with Agentforce

Provide an Agentforce Service agent on your self-service site to help constituents file complaints easily. Have the agent answer questions about the intake process and guide the constituent to provide all the details needed to triage the complaint and begin a review.

When constituents file complaints on your self-service site, they often face challenges from a lack of clarity on procedures and the complex-nature of the forms to fill out to report an issue effectively. Complaints that are incomplete or filed with the wrong agency can prevent timely interventions for constituents.

To improve the quality and efficiency of your complaint filing process, build an agent with the prebuilt Complaint Intake topic and integrate with your self-service site to provide conversational assistance to constituents who want to report issues, incidents, and concerns to your agency.

The agent can assist constituents in these ways:

- Answer their questions about the intake and remedy process, the information to provide, or the next steps.
- Confirm whether your agency can handle the complaint and provide contact information for the appropriate agency if it can't.
- Extract key complaint details from the conversation and prompt them for any missing information required to help effectively address the complaint
- Check and alert them to a complaint they previously filed about the matter that is pending resolution, and avoid a duplicate submission
- Show them a preview of the complaint information to review and confirm
- File the complaint and send an email acknowledgment with a summary for review and confirmation.

Complaint Management with Agentforce

Empower complaint intake officers to manage large complaint volumes efficiently and effectively. Prioritise complaints for resolution using rules and expression sets. Convert complaints into investigations by creating new cases or linking to existing ones. Automate the repetitive, time-consuming tasks in processing complaints so that complaint intake officers can focus on the resolution strategy. Complaint management capabilities are contained in two agent topics: Complaint Resolution and Complaint-to-Case Conversion.

Complaint Resolution

The Complaint Resolution topic helps complaint intake officers quickly resolve complaints by providing a resolution strategy.

Prioritise Complaints for Resolution

Streamline complaint processing by assigning a resolution priority to open complaints. The resolution priority can depend on factors such as the completeness of the complaint information, complaint type, and priority. Complaint officers can use resolution priority to order complaints to be processed instead of being overwhelmed by the hundreds of open complaints in the queue.

Automate Tasks with Agentforce

With the agent customised for complaint resolution, a complaint intake officer can interact with it to:

- Summarise complaint information: The agent collects details from a public complaint and its related records and creates a rich-text summary. From the summary, the officer can quickly learn about a complaint, identify missing details and key contacts, and review recent activity.
- Resolve complaints based on incident age: After summarising a complaint, if the incident in the complaint is older than a policy-defined limit, the agent asks if the officer wants to resolve the complaint without further investigation. The agent resolves the complaint after the officer approves the resolution.
- Consolidate complaint processing: The agent finds open complaints against the perpetrators that are about the same or similar incidents. The officer can group and process the similar complaints together.
- Form resolution strategy based on past complaints: The agent finds similar complaints that were previously resolved. The officer can review these complaints to determine the next steps in the resolution strategy.
- Identify regulatory code breaches: The agent identifies and lists the possible regulatory codes violated by the incident reported in a complaint for the officer to review.
- Log regulatory code violations: The agent creates regulatory code violations to catalog the regulatory code breaches as instructed by the officer.
- Complete assessments: The agent can give an assessment to the officer to make sure that the complaint was handled according to the prescribed procedure. It can also capture information about the actions taken by the officer for auditing and reporting purposes.
- Notify complaint participants: The agent can send emails on behalf of the officer to the complainant and the perpetrators to inform them about the investigation. The agent uses preapproved content in the emails to make sure that the parties involved get all the information they need.

Complaint-to-Case Conversion

The Complaint-to-Case Conversion topic helps complaint intake officers convert a public complaint into a case.

Streamline Complaint-to-Case Linking

Help complaint intake officers efficiently find and associate public complaints with cases. They can find existing cases that match a complaint or create a new case if no match is found. Seamlessly transfer participants and related items from the complaint to the linked case.

Automate Tasks with Agentforce

The complaint intake officer can interact with the agent that's customised for converting a complaint to case to:

- Find similar cases: The agent can find and present similar open cases to the complaint officer by searching for cases with common perpetrators.
- Link or create cases: The agent can link a public complaint to an existing case or create a new case as directed by the complaint officer.

- Add complaint details to case: The agent can add complaint participants, custody items, and regulatory code violations to a case. This process also ensures that the officer can only add relevant and actionable items to a case.

To help you build an agent to assist complaint intake officers, Agentforce Public Sector provides the Complaint Resolution and Complaint-To-Case Conversion topics, related actions, and underlying flows and prompt templates.

Candidate Sourcing with Agentforce

Recruiters can collaborate with an agent to quickly identify potential candidates for a job opening from the pool of past applicants. They can also create leads for the candidates to track outreach, and send outreach emails to invite the candidates to apply for the job opening.

Application Screening with Agentforce

Help recruiters and HR specialists efficiently screen job applications using an agent that provides them with a quick summary of each application. They can then share the shortlisted applications with hiring managers for further assessment.

Create an agent with the prebuilt Application Screening topic that helps recruiters complete these tasks:

Screen resumes faster

Using the agent-generated application summary, recruiters can quickly understand the applicant qualifications and assess their fit against job requirements. The agent stores the summary in a field on the application form for future reference.

Collaborate with hiring managers effectively

Recruiters can seamlessly share shortlisted applications with hiring managers for subsequent interviews and reviews.

By automating routine tasks, the agent assists recruiters to focus on strategic decisions and engage with the most promising candidates, ultimately accelerating the hiring process and quickly identifying top candidates

The agent creates a structured summary of an applicant's data using the application form, which includes these key sections:

- Applicant Overview: A concise summary of the applicant's name, applied position, application date, and the current status.
- Applicant Info: Details such as full name, current role, calculated years of experience, key skills, and certifications..
- Work Experience: List of roles from the most recent to the oldest, detailing key contributions, duration, job highlights, and whether it is a current role or not.
- Summary of Qualifications: Includes details about:
 - Education
 - Examinations
 - Certifications
 - Competencies
- Assessments and Evaluations: Details on each evaluation of the candidate, including its nature and received feedback.

- Vetting: Information about the action plan name and outcome, employment, education, criminal background, reference, and other job-specific checks.

Compliance Management with Agentforce

Compliance officers can use an agent to automate post-visit administrative tasks, allowing them to focus on complex cases. The agent reviews policy documents to identify and summarise violations, suggests appropriate enforcement actions and penalty fees, and emails these details to business owners for their action.

Create an agent with the prebuilt Regulatory Compliance topic. The agent helps compliance officers to complete these tasks:

Analyse inspection findings

Use policy documents to identify applicable regulatory code violations and their details based on the visit context.

Determine and create enforcement actions

Identify appropriate enforcement actions, including details such as compliance due dates, status, and priority.

Calculate penalty fees

Calculate regulatory transaction fee records or penalties, providing details such as fee amount, due date, and status.

Draft and send communication emails

Generate and send templated emails that include inspection details, violations, and enforcement penalties, streamlining communication with business owners.

Respond to inquiries

Answer questions regarding inspections, site visits, regulatory code violations, and compliance issues.

Find relevant policy sections

Effortlessly locate specific sections or topics in policy documents concerning regulatory code violations.

Validate regulatory codes

Ensure the accuracy and validity of regulatory codes, reducing the risk of non-compliance.

Summarise violation details

Provide concise summaries or detailed information about regulatory codes and violations, aiding in quick decision-making.

Automate record creation

Create records for regulatory code violations, violation enforcement action, and regulatory transaction fee, ensuring accurate documentation.

Benefit Assistance with Agentforce

Use an AI-powered chatbot on your Experience Cloud site to provide constituents with information about benefit programs, qualification criteria, and application processes.

The Benefit Assistance Agent is an AI-powered chatbot for your Experience Cloud site. It provides constituents with information about your benefit programs, qualification criteria, and application processes by answering questions and guiding them through pre-screening questionnaires. The agent can be deployed to assist both guest users and authenticated (logged-in) users on your portal.

The Benefit Assistance Agent uses two core technologies to assist users:

Retrieval Augmented Generation (RAG)

The agent answers constituent questions by retrieving information directly from your agency's official policy documents. You provide these documents to the agent through the Agentforce Data Library. This process ensures that the agent's answers are grounded in your specific, approved content.

Discovery Framework

The agent runs pre-screening questionnaires to help determine a constituent's potential qualification for benefits. It uses flows and decision tables that you configure to evaluate user responses against your program's qualifying criteria.

Agentforce Public Sector provides a pre-built Benefit Assistance Topic that includes the necessary flows and prompt templates for the agent to function. These components are designed to answer questions based on your policy documents, ask constituents a series of pre-screening questions, and check which benefits they may qualify for.

Contact centre Management

Public Sector organisations often face unique challenges in managing interactions with end users. Contact centre Management within Salesforce's Agentforce Public Sector provides a comprehensive framework to streamline and enhance these interactions. By leveraging advanced tools and features, public sector organisations can ensure efficient, transparent, and responsive communication with the public.

Contact centre Management is designed to support caseworkers, service representatives, and other public sector employees in addressing citizen concerns effectively. It integrates seamlessly with other Salesforce components, offering a unified platform for managing inquiries, complaints, applications, and more. This integration not only improves operational efficiency but also enhances the overall experience for citizens, ensuring their needs are met promptly and accurately. It also helps ensure automated, effective service using AI and a personalised experience across channels

Features and Benefits of Agentforce Public Sector Contact centre Management

Unified Interface for Case Management

- Contact centre Management provides a single, unified interface where caseworkers can manage all citizen interactions. This interface consolidates information from various sources, making it easier for employees to access and act on relevant data.
- The unified interface reduces the time spent switching between different systems, allowing caseworkers to focus more on resolving issues for the public.

Automated Workflows and Processes

- 1) Automation is a key feature of Contact centre Management. It enables the creation of automated workflows that guide caseworkers through standard procedures, ensuring consistency and compliance with agency policies.
- 2) Automated processes can handle routine tasks such as application reviews, approvals, and follow-ups, freeing up caseworkers to handle more complex issues.

Real-Time Analytics and Reporting

- Contact centre Management includes robust analytics and reporting tools that provide real-time insights into citizen interactions and case statuses. These tools help organisations monitor performance, identify trends, and make data-driven decisions.
- Real-time analytics enable proactive management of contact centre operations, ensuring that potential issues are addressed before they escalate.

Omnichannel Support

- Agentforce Public Sector Contact centre Management supports multiple communication channels, including phone, email, chat, and social media. This omnichannel approach ensures that citizens can reach out through their preferred method of communication.
- Omnichannel support also allows caseworkers to manage all interactions from a single platform, providing a seamless experience for both employees and stakeholders.
- Omnichannel Supervisor provides a single tool where supervisors can monitor and assist contact centre agents regardless of the channels in which they are active.

Customisable Dashboards and Interfaces

- The platform offers customisable dashboards and interfaces that can be tailored to meet the specific needs of different public sector agencies. These customisations ensure that caseworkers have access to the most relevant information and tools for their roles.
- Customisable interfaces enhance user experience and improve efficiency by presenting data in a clear and actionable format.
- With the usage of data cloud, the data behind these dashboards are rendered richer thereby generating better actionable insights

Enhanced Security and Compliance

- Security and compliance are critical in the public sector. Contact centre Management includes features such as identity verification, audit trails, and compliant data sharing to ensure that citizen information is handled securely and in accordance with regulations.
- These security measures help prevent fraud and protect sensitive information, building trust with citizens.

Integration with Other Salesforce Products

- Contact centre Management is an inherent component of the Salesforce Customer 360 platform - activated by appropriate licenses. As such it seamlessly integrates with other Salesforce products, such as Experience Cloud and Data Cloud. This seamless architecture provides a native interface for access by the public - and other partners, and enables more effective case management.

- By leveraging the full suite Salesforce Customer 360 platform, public sector organisations can enhance their service delivery and improve stakeholder satisfaction.

Scalability and Flexibility

1. The platform is designed to scale with the needs of public sector organisations. Whether managing a small team of caseworkers or a large contact centre, Contact centre Management can be configured to support varying levels of complexity and volume.
2. Its flexibility allows agencies to adapt the platform to changing requirements and evolving citizen needs.
3. Use of low code/no code tools, extensive APIs and integration, and modular components further help scaling rapidly

The Agentforce Public Sector Contact centre Management provides a comprehensive framework designed to enhance the efficiency and effectiveness of public sector contact centres. By leveraging Salesforce's robust platform, it enables seamless integration of various communication channels, ensuring that citizens receive timely and accurate responses to their inquiries. The solution also offers advanced analytics and reporting tools, allowing agencies to monitor performance metrics and make data-driven decisions to improve service delivery.

Furthermore, the solution emphasises the importance of accessibility and inclusivity, ensuring that all citizens, regardless of their background or abilities, can access the services they need. With features such as automated workflows, case management, and knowledge base integration, public sector organisations can streamline their operations and reduce response times. Overall, the Agentforce Public Sector Contact centre Management is a vital tool for modernising public sector service delivery, fostering greater trust and satisfaction among citizens.

Agentforce Capabilities

- Agentforce can provide context from multiple systems to help consolidate information, make sense of it and then present a unified interface for case management.
- Autonomous agents can engage citizens across channels 24x7 with natural responses which take into account the previous context of the conversation and are grounded in trusted data.
- Agentforce has strict security guardrails to work within defined parameters and can seamlessly escalate to human reps when needed.
- Agentforce allows effortless conversations with end users across channels that are easier to build and maintain.
- **Complaint filing Agent.** Provide support to end users who need to raise a complaint, an incident or a concern to help them file complaints accurately and ensure jurisdictional alignment and information completeness.
- **Complaint Management Agent**
 - Automate prioritisation and categorisation: Score complaints, incidents and concerns based on formal and qualitative criteria to prioritise complaints by severity and assign them to the appropriate category for resolution.
 - Deconflict complaints, incidents and concerns: Identify similar complaints and group them into unified case groups to deconflict and streamline resolution efforts.

- Improve accuracy and thoroughness: Strengthen complaint management processes by analysing evidence and identifying violations, allowing for greater focus on critical issues.
- Ensure timely responses: Offer real-time updates on complaint status and resolutions to ensure prompt and transparent communication with complainants.
- Create investigation cases when needed.

Employee Service

Today's tough job market and the broader shift toward working from anywhere has created an imperative for governments to modernise the employee experience. Today's employees expect to be treated more like customers - they want the experiences they have in their personal lives to translate over into work. The employee experience at work includes the big and small events and experiences starting with recruitment and spanning your time at an organisation. And there's a name for it: the connected employee experience.

Salesforce Employee Experience is designed to help companies create a more connected and productive workforce. With Agentforce Public Sector Employee Experience, employees can be better served via:

- 1) **Streamline Processes.** The platform can help streamline various HR processes, such as onboarding, training, and performance management. This can make these processes more efficient and less time-consuming for both employees and HR staff.
- 2) **Enhance Employee Engagement.** By providing employees with the tools and resources they need to succeed, Employee Experience can help boost employee engagement and satisfaction.
- 3) **Integration:** Leverage MuleSoft's (*additional licensing option*) pre-built connectors for systems, including Oracle, DocuSign, and other common HR systems through secure APIs and integrations allowing for a seamless and unified employee experience.
- 4) **Employee Self-Service:** Allow employees to access and manage their own HR-related information, reducing the workload on HR staff and empowering employees. Create a single connected online help centre for HR questions with a searchable knowledge centre and ticketing system.

Features and Benefits for Agentforce Public Sector Employee Service

Agentforce Public Sector for Employee Experience offer a comprehensive approach to managing and enhancing the employee lifecycle, ultimately leading to a more engaged, productive, and satisfied workforce.

Assessment for Employee Community

The Assessment for Employee Community feature is designed to facilitate the creation and management of assessments for both supervisors and employees. This feature streamlines the assessment process, making it easier for supervisors to evaluate employee performance and for employees to understand their progress and areas for improvement. By providing a structured and efficient way to handle assessments, this feature helps in maintaining a high standard of performance management within the organisation.

Supervisors can use this feature to create customised assessments that align with the specific goals and objectives of their teams. They can track progress, provide feedback, and set actionable goals for their employees, ensuring continuous development and improvement. For employees, the ability to view and manage their assessments provides clarity on their performance expectations and achievements, fostering a culture of transparency and accountability.

Benefits and Care Plans for Employee Community

The Benefits and Care Plans for Employee Community feature allows supervisors to create and manage care plans, assign benefits, and set goals for their employees. This comprehensive approach ensures that employees receive the support they need to achieve their personal and professional goals. By

providing a clear and structured way to manage benefits and care plans, this feature helps in enhancing employee satisfaction and well-being.

Employees can easily view their care plans, benefits, and goals through the platform, ensuring that they are always aware of the support available to them. This transparency helps in building trust and engagement, as employees feel valued and supported by their organisation. Additionally, the ability to track and manage benefits and care plans ensures that employees can make the most of the resources available to them, leading to a more motivated and productive workforce.

Case Management for Employee Community

The Case Management for Employee Community feature provides a robust platform for employees and supervisors to create and manage cases, applications, complaints, and referrals. This feature offers comprehensive information, including provider, person, and household details, life events, timelines, and relationship graphs, ensuring thorough and effective case management. By centralising all case-related information, this feature enhances the efficiency and accuracy of case handling.

Supervisors and employees can easily track the progress of their cases, ensuring that issues are resolved promptly and effectively. The ability to manage cases in a structured and organised manner helps in maintaining high standards of service delivery and compliance. This feature also supports collaboration between different departments and teams, ensuring that all relevant stakeholders are involved in the case management process.

Case Proceedings for Employee Community

The Case Proceedings for Employee Community feature is designed for those involved in case investigations, providing access to detailed case proceedings. This feature ensures that all participants have the necessary information to manage and resolve cases effectively. By providing a centralised platform for case proceedings, this feature enhances the transparency and accountability of the case management process.

Participants can easily access and review case proceedings, ensuring that they are always informed about the status and progress of their cases. This helps in maintaining a high level of coordination and collaboration among all stakeholders, ensuring that cases are resolved in a timely and efficient manner. The ability to track and manage case proceedings also supports compliance with organisational policies and regulations, ensuring that all cases are handled in a fair and consistent manner.

Evidence Management for Employee Community

The Evidence Management for Employee Community feature allows employees and supervisors to track evidence for complaint and case investigations. This feature ensures that all case participants have access to the necessary evidence, supporting thorough and accurate case management. By providing a centralised platform for evidence management, this feature enhances the efficiency and effectiveness of the investigation process.

Supervisors and employees can easily upload, review, and manage evidence, ensuring that all relevant information is available when needed. This helps in maintaining the integrity and accuracy of the investigation process, ensuring that all cases are resolved based on complete and accurate information. The ability to track and manage evidence also supports compliance with organisational policies and regulations, ensuring that all investigations are conducted in a fair and transparent manner.

License, Permit, and Inspections Management for Employee Community

The License and Permit Management for Employee Community feature empowers employees and supervisors to efficiently oversee and process licensing and inspection activities. This feature ensures a comprehensive view of critical data, such as applicant and entity information, timelines, inspection outcomes, and compliance status, enabling streamlined workflows and improved decision-making. By providing real-time updates and comprehensive insights, these tools ensure accurate and timely management of licenses and permits.

Employees can seamlessly monitor application progress and inspection results, ensuring compliance with regulations and addressing issues proactively. This helps in maintaining high standards of compliance across the organisation. The ability to track and manage authorisations and inspections also supports compliance with organisational policies and regulations, ensuring that all inspections and authorisations are handled in a fair and consistent manner.

Enhance Employee Operations with Employee Service

The Enhance Employee Operations with Employee Service feature includes a suite of tools and features designed to improve the efficiency and effectiveness of employee operations. This feature supports centralised, scalable, and secure HR processes, ensuring that government employees are more connected, effective, and productive. By streamlining internal operations, this feature helps in reducing administrative overhead and improving overall organisational performance.

Employees can easily access the tools and resources they need to perform their tasks, ensuring that they can work more efficiently and effectively. The centralised platform also supports collaboration and communication among different teams and departments, fostering a more cohesive and integrated work environment. By enhancing the connectivity and efficiency of employee operations, this feature contributes to a more productive and engaged workforce.

In addition to improving operational efficiency, the Enhance Employee Operations with Employee Service feature also supports the scalability and security of HR processes. This ensures that the organisation can adapt to changing needs and demands while maintaining a high level of security and compliance. By providing a robust and flexible platform for managing employee operations, this feature helps in driving continuous improvement and innovation within the organisation.

In summary, Agentforce Public Sector for Employee Experience offers a comprehensive suite of features designed to enhance the employee lifecycle, from onboarding to ongoing support and development. By providing centralised and user-friendly tools, these features help in improving productivity, engagement, and satisfaction among employees. Whether it's through the Employee Workspace, Employee Concierge, or advanced case and evidence management capabilities, these solutions ensure that employees have the resources and support they need to succeed in their roles.

By streamlining HR and other processes, facilitating effective case management, and providing tailored support and resources, these features contribute to a more efficient and effective organisation. The focus on enhancing the employee experience not only benefits individual employees but also drives overall organisational performance and success. With these robust and scalable solutions, public sector

organisations can ensure that their workforce is well-supported, motivated, and equipped to meet the challenges of their roles.

Emergency Program Management

Salesforce Emergency Program Management (EPM) is a comprehensive solution designed to help organisations manage and respond to crises effectively. Quickly deploy a single digital destination for constituents and communities to access emergency program information and incident updates. Use the Emergency Response Community site to feature different services and programs that are available to public agencies and hospitals, such as emergency supply requests.

With Emergency Program Management agencies can:

- **Respond faster to crises.** Leverage pre-configured templates to launch a digital experience where citizens can request emergency assistance and get information when they need it most
- **Respond to requests.** Allow individuals and families to submit requests for assistance for temporary housing, emergency supplies and help.
- **Coordinate the community response.** Provide those wanting to help to donate supplies and those wanting to volunteer a single destination to get involved. Manage volunteer projects within Salesforce and make them visible to those wanting to assist. Volunteers can sign up for volunteer projects on your site and update their time spent on volunteer activities.
- **Identify benefit needs.** Assess and evaluate what benefits and services the individuals and families may be eligible for and disburse eligible benefits/services.
- **Assess damage across the community.** Leverage Salesforce Inspection Management to send field responders out to affected areas to inspect the damage and if citizens can return after disaster. Field responders can complete an inspection or an emergency supply delivery right on their mobile phone. Contact information, directions, and a detailed accounting of their tasks are at their fingertips.

Features and Benefits of Agentforce Public Sector Emergency Program Management

Agentforce Public Sector for Emergency Program Management provides a comprehensive and effective toolset for managing emergencies, ensuring that agencies can respond swiftly and effectively to protect public safety. Features and benefits include the following:

License, Permit, and Inspection Management (LPI)

Leverage license, permit, and inspections capabilities in response to natural disasters and other emergencies. Conduct inspections of facilities, infrastructure, equipment, and routes for safety, damages/repair, hazardous materials, and compliance with environmental and other regulations. Provide license, permits, and/or other authorisations to organisations providing emergency services such as those required for temporary medical facilities or refugee/migrant shelter operations.

Compliance and Regulatory Support

The solution ensures compliance with relevant regulations and standards, providing tools to document and report activities as required by law. This feature helps agencies meet their legal obligations and maintain transparency and accountability. The benefit is reduced legal risk and enhanced public trust in emergency management efforts.

Community Engagement and Support

Our solution includes features for engaging with the community, such as public information portals and feedback mechanisms. This feature allows agencies to keep the public informed, gather input, and address concerns proactively. The benefit is increased public awareness and cooperation, fostering a resilient and prepared community.

Benefits and Care

The Benefits and Care Plans for Emergency programs allows supervisors to create and manage care plans, assign benefits, and set goals for their employees. This comprehensive approach ensures that employees receive the support they need to achieve their personal and professional goals. By providing a clear and structured way to manage benefits and care plans, this feature helps in delivering benefits and services that are in need of assistance immediately.

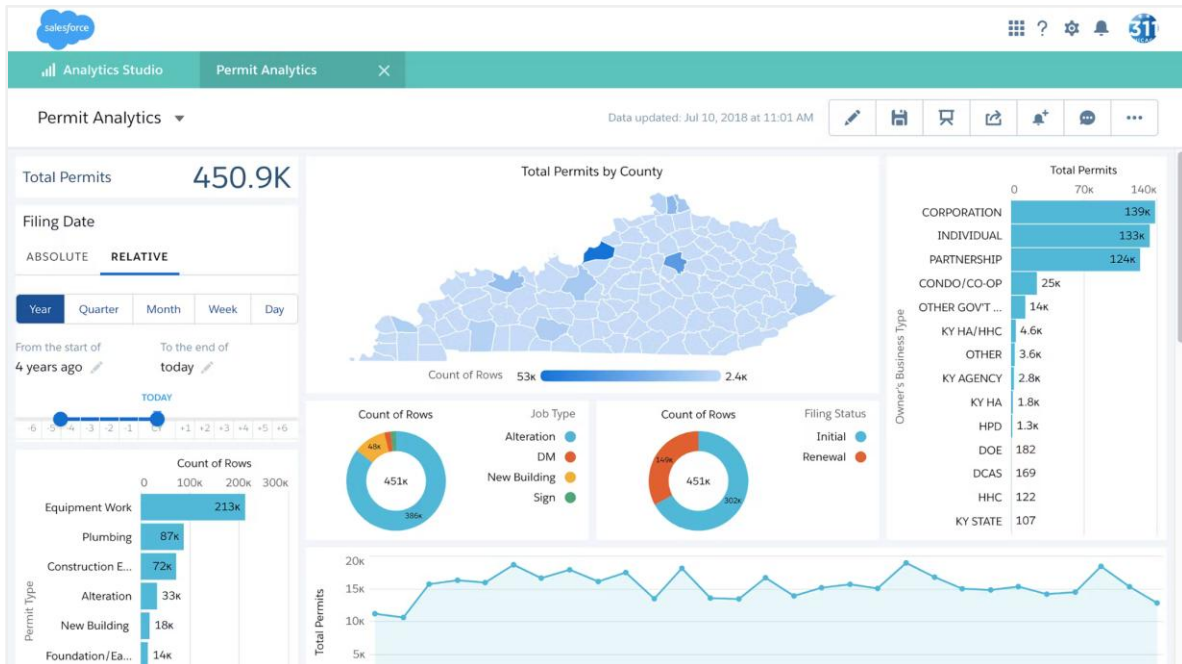
Core Extensible Capabilities Applicable to all APS (*additional licensing options*)

CRM Analytics for Agentforce Public Sector

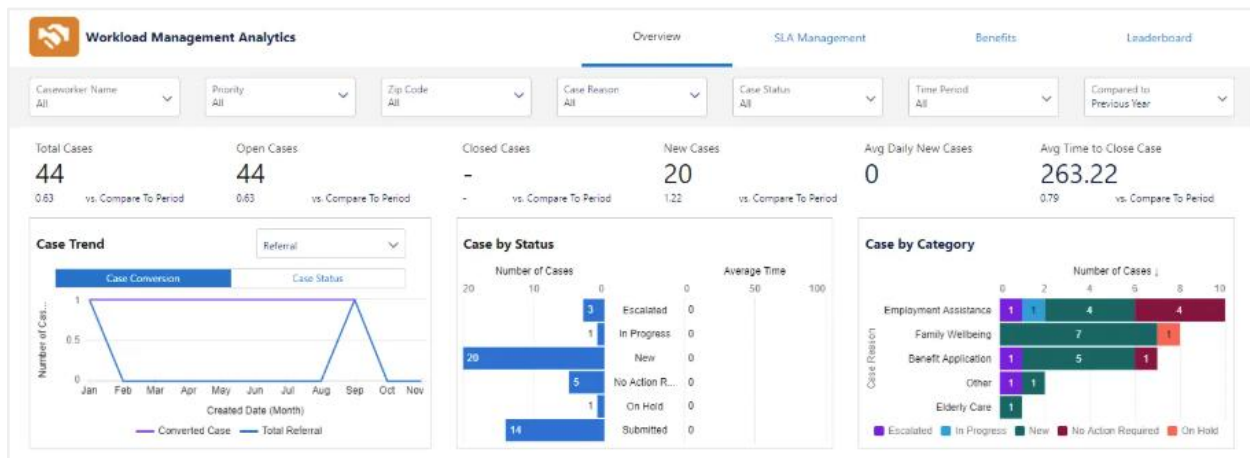
CRM Analytics for Public Sector improves visibility into important operation data with prebuilt dashboards and templates. With these analytical tools, you gain a valuable understanding of the underlying data in your org and use predictive analytics based on industry standards to guide your decisions.

The CRM Analytics apps work alongside the other Agentforce Public Sector apps in your org so you can capture and visualise trends, monitor workloads, and gain a better perspective of your operations. Each app includes a set of templates and dashboards with easy-to-understand charts and explanations. Think of each dashboard as a prism. Just as a prism disperses light into a spectrum of colors, CRM Analytics for Public Sector dashboards break down data into a spectrum of actionable insights.

CRM Analytics for Agentforce Public Sector provides intelligent insights that help agencies improve departmental productivity and citizen satisfaction. Your organisation can gain insights into caseloads, applications, complaints, case trends, community impact, and caseworker efficiency, enabling data-driven decision-making and improved citizen outcomes.



Example Dashboard: Use Salesforce Analytics to get full view of applications and active licenses and permits

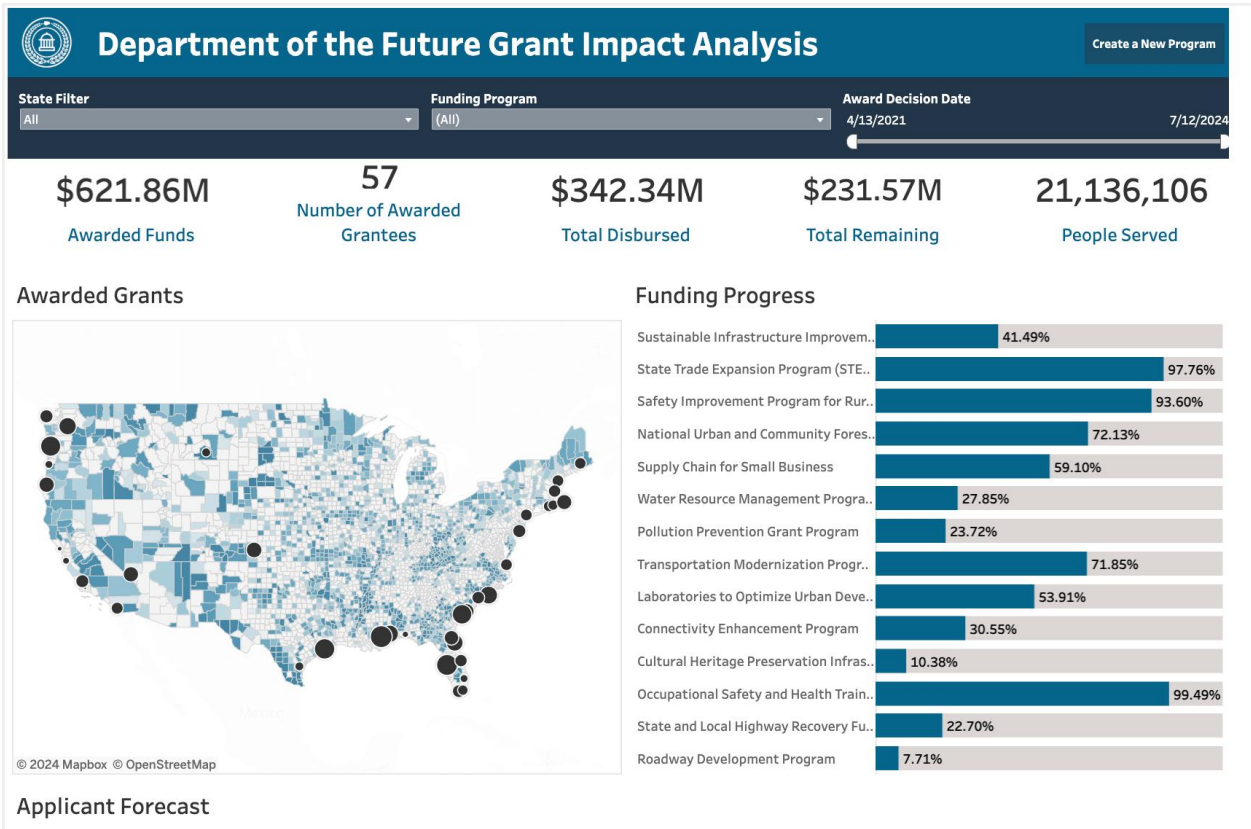


Example Dashboard for Case Management: The Workload Management Analytics dashboard enables you to prioritise and distribute cases with confidence—balance workloads, increase productivity, and improve community impact.

Tableau for Agentforce Public Sector

Tableau is the market leader for visual data analysis. Tableau's flexibility and built-in array of graphical charts and displays will allow your organisation to quickly build and deploy a variety of dashboards and analysis capabilities for virtually all envisioned use cases. Tableau includes a wide variety of optimised data connectors, making Tableau the ideal choice for environments where multiple data sources are required in order to bring clarity on a given business problem. Tableau supports and works in conjunction with standard security mechanisms, assuring only those with appropriate access are capable of

interacting with specific projects, dashboards and reports. The Tableau solution has been built on the principles of ease of use for all knowledge workers. Everyday users should not be encumbered by or limited by the capacity of the IT shop to develop and provide data analytics. Tableau's products are built on breakthrough technologies that allow users to quickly create visually compelling ways to see and understand one's data.



Example Dashboard of how you can use Tableau for Grants Management:
Tableau Dashboard of real-time performance insights, where future funding areas can be explored, along with grant allocation and impact data

Customer Community for Agentforce Public Sector (login/member)

Experience Cloud–based license that includes permissions for citizens to access Agentforce Public Sector functionality. Includes Public Sector industry-specific functionality, Pre-built community access and templates.

Customer Community Plus for Agentforce Public Sector (login/member)

Experience Cloud–based license that includes permissions for citizens to access Agentforce Public Sector functionality. Includes Public Sector industry-specific functionality, Pre-built community access and templates.

Provider Self-Service for Agentforce Public Sector (login/member)

Provider Self-Service for Agentforce Public Sector enables certified providers to efficiently manage their interactions with government agencies through a dedicated Experience Cloud site. This platform allows providers to process referral requests, enroll clients in sessions, track service delivery, and manage their information. By offering a transparent and collaborative environment, it ensures that both providers and agencies have real-time visibility into service delivery and client progress.

Providers can use the portal to review and act on referral requests, manage benefit schedules, and track client attendance. The site includes preconfigured pages for various functionalities such as client management, schedules, and attendance tracking. Additionally, providers can update their specialties, facilities, and credentials, ensuring that all information is current and accurate. This self-service capability streamlines operations, reduces administrative overhead, and fosters a more effective partnership between providers and public sector agencies.

Salesforce Contracts for Agentforce Public Sector

Salesforce Contracts enables organisations to create and maintain the entire lifecycle of contracts associated with opportunities, orders, quotes, and other Salesforce standard and custom objects. When you purchase an add-on license you get the corresponding platform license and permission set license. Salesforce Contracts can be integrated with Agentforce Public Sector to manage the contract lifecycle effectively. This integration allows users to create agreements using OmniStudio Document Generation, requirements, etc., and manage contracts seamlessly. Additionally, it supports compliant data sharing, enabling administrators to control and monitor data sharing without complex coding. This functionality enhances the overall process, providing a comprehensive solution for public sector organisations and citizens.

MuleSoft for Agentforce Public Sector

MuleSoft for Agentforce Public Sector provides a robust integration platform tailored to the unique needs of government agencies. MuleSoft enables seamless integration of various applications, data sources, and devices, whether they are on-premises or in the cloud. This platform-as-a-service (iPaaS) solution helps reduce the infrastructure and management costs associated with legacy systems, allowing IT teams to concentrate on designing and implementing integrations rather than managing infrastructure. MuleSoft connects enterprise apps, data and devices, across any cloud and on-premises, will accelerate your digital transformations, enabling your organisation to unlock data across legacy systems, cloud apps and devices to make smarter, faster decisions and create highly differentiated, connected experiences.

MuleSoft Government Cloud, a secure and FedRAMP-moderate certified environment, supports the full API-led connectivity methodology and end-to-end API lifecycle management. It includes functionalities such as API design, testing, and management, along with robust security protocols like FIPS 140-2 and TLS 1.2 encryption. This ensures that all government integration assets are managed and monitored from a single, secure, cloud-based console, providing a comprehensive solution for public sector integration needs.

Intelligent Document Verification

To help reduce manual effort and potential for error, Agentforce Public Sector offers an intelligent form reader that lets your organisation automatically capture application data using mappings and extract and verify information from uploaded documents. It features optical character recognition (OCR) to extract

fields from documents and checklist items to verify uploaded data. Intelligent Document Reader uses optical character recognition to automatically extract data using Amazon Textract using your AWS account. You can specify the document type that can be associated with the uploaded document, upload the document, and map the document's fields to the appropriate Salesforce data object's fields. For example, you can specify that a patient's birth date in a referral form must be stored in the Birthdate field of the patient's Contact record. The extracted information can be used to create or update record fields, or to verify data that's already in the org. For example, you can check a person's birth date against the birth date in their scanned passport. You can extract printed text, handwriting, layout elements, and data from any document such as a small business loan, federal tax forms, and business applications, with a high degree of accuracy (<https://aws.amazon.com/textract/>).

The screenshot displays a web application interface for reviewing and updating document files. The left sidebar shows a list of documents, with the selected document being a scanned DMV form. The main area is divided into two panes. The left pane shows the scanned document with various fields filled out, including the applicant's name (Morticia Adams), date of birth (04/13/1999), and address (300 SPECTRUM Center Dr, Irvine). The right pane shows the 'Update Individual Application' form, which includes fields for Account, Category, Application Status, Applied Date, Application Case, and License Type. The form is currently in the 'Submitted' state, and the 'Applied Date' is set to 4/13/2021 at 12:00 PM.

Intelligent Document Reader leverages Optical Character Recognition (OCR) to extract images of text into readable format and for verification and input into Salesforce fields.

Agentforce Public Sector: ESRI GIS Geospatial Accelerator

If your needs involve mapping or ESRI integration, then this free accelerator developed in partnership with Salesforce allows you to embed an interactive map experience in the flow of their application.

This is a [Agentforce Public Sector accelerator](#) that uses ESRI Leaflet to allow:

1. Applicants to view reserved areas and draw a polygon of the requested location.
2. Reviewers to view submitted polygon areas and approve or alter the requested location.

This accelerator utilises several components, including Omnistudio, Lighting Web Components (LWC), Visualforce (VF) page, and ESRI Maps libraries. These components will work together to achieve the project objectives. The LWC will receive the input from the user, which will then be submitted to the backend server. The server will process the request and store the data in the necessary objects. The VF page will display the map where users can plot the relevant area, and the ESRI Maps libraries will provide the map functionality.

Axxy Mobile

[Axxy](#) Mobile for Salesforce lets you leverage the power of the Salesforce Platform, Agentforce Public Sector, Consumer Goods Cloud, and Salesforce Field Service with a mobile app designed to help you do your job efficiently even when offline.

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 Public Sector, Force.com, Communities, Chatter, Site.com, Database.com, Analytics Cloud, Agentforce Financial Service, Agentforce Health, Heroku, Pardot and Agentforce Revenue Management
<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

Global Audit Compliance

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

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

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

Accessibility

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

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

- Webchat Support: Our webchat products have been assessed against WCAG 2.2 standards. Details of this compliance are described in our Voluntary Product Accessibility Template (VPAT) statements (available at: https://www.salesforce.com/company/legal/508_accessibility/). While formal usability studies with assistive technology have not been conducted, the services have been robustly assessed against WCAG 2.2. Furthermore, existing customers have successfully conducted testing and are utilizing the Salesforce Webchat capability in live services.
- Support and Documentation Accessibility
 - User Support: We are committed to ensuring our user support channels (Email, Ticketing, and Webchat) are accessible for users working with assistive

technology. We strive to ensure our support staff work with services that strive to meet WCAG 2.2 Level AA to ensure an effective support experience.

- Documentation: All official documentation, including resources for onboarding and offboarding, strives to meet WCAG 2.2 Level AA to the extent possible.
- Maintenance and Review Methodology
 - Review Cycle: We maintain a formal process for reviewing our adherence to WCAG 2.2 AA standards across all products.
 - Continuous Improvement: We are committed to moving our accessibility review cycle from an annual basis to a six-month (semi-annual) schedule. This ensures that any bugs or regressions are identified and remediated promptly in alignment with every release.
 - Consistency: Our enterprise adheres strictly to WCAG 2.2 Level AA as the consistent standard for all accessibility compliance initiatives.

3. Data Backup / Restore and Disaster Recovery

Redundancy and Scalability

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

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

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

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

Disaster Recovery

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

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

Backup

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

To help customers routinely back up their data, Salesforce offers several native options that are available for no additional cost to customers. Salesforce provides tools like Data Loader and the API as a method for customers to manually restore their data. It is important to note the order in which data is restored, so that relationships and the connection to related records can be preserved.

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

- How To: Platform: Backup and Manage Salesforce Data (Accelerator Webinar): <https://help.salesforce.com/articleView?id=000354893&type=1&mode=1> (for premier customers).
- Data Export Service: Manual or scheduled exports of your data via the UI. Export Backup Data from Salesforce: https://help.salesforce.com/s/articleView?id=xcloud.admin_exportdata.htm&type=5..
- Data Loader: Manual on-demand exports of your data via the API. Export Data: https://help.salesforce.com/articleView?id=exporting_data.htm&type=5.
- Report Export: Manual on-demand exports of your data via reports. Export a Report: https://help.salesforce.com/articleView?id=reports_export.htm&type=5.
- Salesforce Backup and Restore product: <https://www.salesforce.com/platform/data-backup-recovery/>

Restore

Salesforce offers several native options at no additional cost to help customers routinely back up their data. Depending on your edition, your org can generate and export backup files on a weekly or monthly basis. Individual users can view and restore their deleted records from the Recycle

Bin, where all deleted records reside for 15 days before being deleted from the system. Admins also have access to an org-wide Recycle Bin to restore or permanently delete records during the 15-day window. Salesforce also supports manual restore via Data Loader and API.

As an add-on solution, Salesforce Backup 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 metadata if you choose to do so. We provide your data in an industry standard readable format to make it as easy as possible for you to migrate to another service if you wish to do so. For further details of data extraction and removal, please refer to section 5.2 below.

5.1. Termination

Details of termination options and implications are contained in our terms. The Supplier would never terminate except for buyers' material breach of the Call-Off Contract and the terms.

5.2. Data Extraction and removal

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

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

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

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

6. Pricing Summary

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

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

7. Service Constraints

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

Usage Limits

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

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

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

8. Service Management

Your success is our success

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

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

Standard Success

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

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

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

Premier Success

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

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

Benefits include:

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

Specialised Guidance

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

Expert Assistance

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

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

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

Specialised Guidance

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

Signature Success

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

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

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

Customer Success Manager (CSM)

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

Proactive services

Signature Success includes 24/7 monitoring that is tailored to your configuration. Your CSM coordinates with Proactive Services Engineers experts and helps ensure you prevent or mitigate

potential issues identified, before they can create business disruption. If anything does go wrong, you can expect early alerts, remediation, and reviews to eliminate recurring root cause patterns.

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

Accelerators

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

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

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

9. Customer Responsibilities

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

Management

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

Compliance

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

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

Usage Restrictions & Information Security

You must:

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

You must not:

- Use the service to store or transmit infringing, libellous, or otherwise unlawful or tortious material, or to store or transmit material in violation of third-party privacy rights.
- Use the service to store or transmit malicious code.
- Interfere with or disrupt the integrity or performance of any service or third-party data contained therein.
- Attempt to gain unauthorised access to any service or content or its related systems or networks.

- Permit direct or indirect access to or use of any service or content in a way that circumvents a contractual usage limit.

10. Client-side Technical Requirements

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

Browser requirements

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

Internet access

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

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 on <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.

THE CONTENT OF THIS DOCUMENT IS FOR INFORMATIONAL PURPOSES ONLY AND A CUSTOMER'S RIGHTS AND REMEDIES ARE GOVERNED EXCLUSIVELY BY THE G-CLOUD 15 CALL-OFF CONTRACT AND SUPPLIER TERMS. ANY RESPONSE TIMES OR CUSTOMER OUTCOMES STATED HEREIN ARE INDICATIVE ONLY.