

Insight Direct (UK) Ltd

Salesforce Lightning Agentforce Digital Experiences (formerly Salesforce Lightning Experience Cloud)

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



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Salesforce Lightning Agentforce Digital Experiences

1. Service Description

1.1. Service Overview

Salesforce Lightning Experience Cloud [Former name] is now [Lightning Agentforce Digital Experiences]. You may continue to see the former name in our application and documentation. Salesforce Agentforce Digital Experiences is the transactional, self-service and collaborative web portal for the government. Proactively push knowledge to answer citizen queries. Enable community collaboration and support on the same platform where your CRM data resides. Validate identity to allow users to create cases, browse case updates and transaction history. Generate web forms to submit information directly into support processes and the back office.

Whether you're an admin, designer, or developer, Agentforce Digital Experiences makes it easy to work the way you want. You can:

- Create customised sites using no-code, point-and-click tools and prebuilt templates, themes, and components.
- Build custom components, apps, and processes using low-code tools for interactive development and automation.
- Develop customised, enterprise-level sites and portals programmatically. Update sites quickly, using your preferred pro-code development tools such as Salesforce Extensions for VS Code, Salesforce CLI, or your favorite IDE or text editor.

Boost your organisation's performance with internal and external collaboration.

Created by and for the people, government agencies must be able to collaborate and manage relationships with constituents, volunteers, employees, partner organisations and other agencies. Regular communication is not just expected; often it is mandated by law. What if you could leverage a single platform for all incoming and outgoing communication, from public notices and announcements, to internal policy changes, constituent surveys and more.

In the social and mobile age, citizens have come to expect more from government agencies. They are no longer willing to wade through paper-based processes in order to access services. Does your agency collaborate openly and seamlessly?

With Salesforce Agentforce Digital Experiences, agencies can connect, engage, and create social communities everywhere.

Citizen experiences capture correspondence from citizens. They are cloud-based, so they easily scale to support any incoming case volume. From one console, agents can engage with citizens across any device or social channel.

Partner experiences are collaboration portals that allow agencies to engage with business partners or other agencies around strategic initiatives. Get projects done faster while maintaining security and compliance, by customising which data is exposed to partner organisations.

Customer Community Plus, more powerful than the Customer Community licence, Customer Community Plus adds additional roles and Sharing, delegated administration capabilities, tasks, read access to reports and Dashboards and additional storage.

Internal experiences increase employee productivity and drive inter-departmental cooperation. Collaborate in real time around citizen inquiries, internal documents and other data.

Interactions in all of these experiences are measured with powerful, built-in reports and dashboards. These tools can easily be configured to provide actionable metrics and meet ever-changing compliance regulations.

Salesforce's flagship customer relationship management (CRM) product is the core of the Agentforce Digital Experiences solution. Recognised by Gartner as the #1 CRM system and by IDC as the #1 cloud platform, Salesforce provides the most comprehensive suite of collaboration solutions for government organisations.

Scale customer support with a self-service experience built directly into your CRM. Reduce costs and increase case deflection by helping customers find answers on their own. Drive proactive and personalised support from the self-service portal to the field with the power of AI and automation natively integrated with the Agentforce 360 Platform. You can surface the most relevant information, provide recommended next steps, and give customers the tools to complete common tasks without the help of an agent.

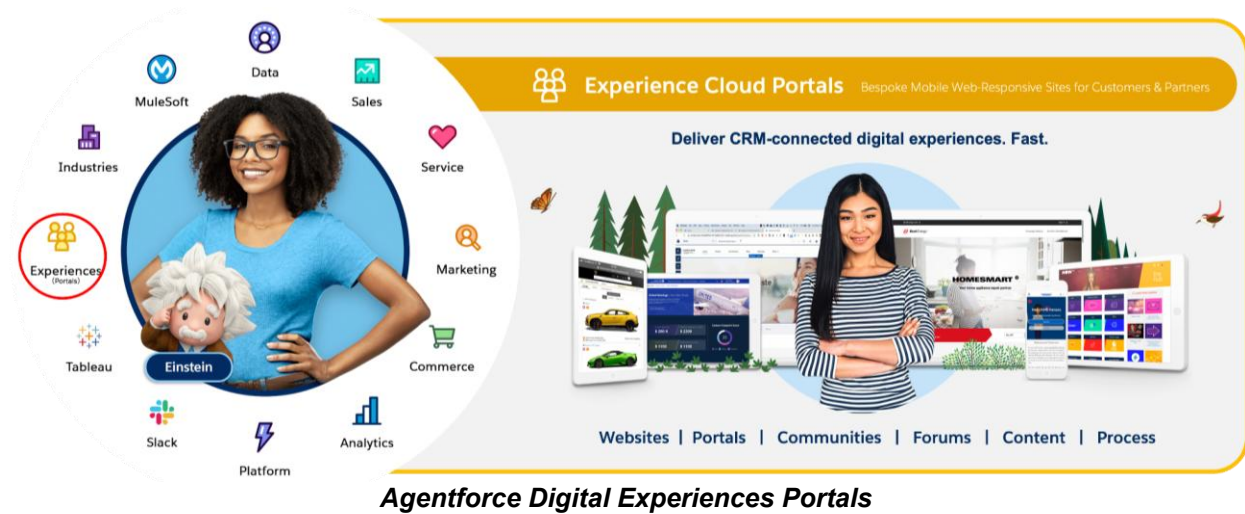
Salesforce Generative Artificial Intelligence makes it possible for your organisation to deliver smarter, faster, and more productive and personalised citizen experiences. AI will automatically discover and surface relevant insights, predict answers to solve questions fast, and proactively make recommendations. It will even automate tasks. AI helps Agentforce Digital Experiences customers find exactly what they need; illuminating the quickest path to the best information so they get answers fast. Your whole community experience is better.

With today's budget constraints, streamlining government programme/project management and partner/vendor management is more important than ever. Dramatically increase effectiveness and efficiency with new social, mobile technologies to connect all relevant external stakeholders seamlessly with your organisation.

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

Agentforce Digital Experiences Key Features:

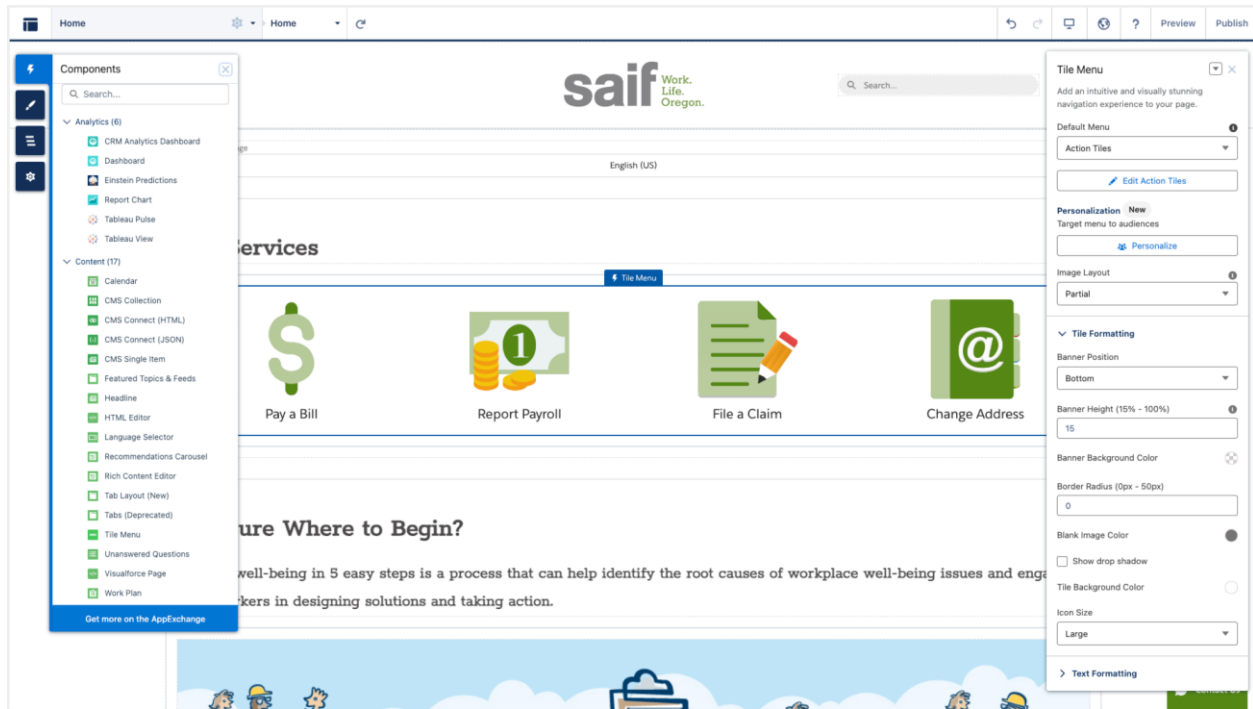
- Experience Builder
- Experience Templates and Themes
- Content Management System CMS
- Audience Targeting
- Community Discussions, Forums and Moderation



Agentforce Digital Experiences Portals

Experience Builder

Salesforce Experience Builder is a powerful, user-friendly tool designed to facilitate the creation and management of websites and digital experiences on the Salesforce platform. Experience Builder is a declarative, clicks-based interface that allows users to build sites without writing any code, thereby democratising web development and allowing non-technical users to create and manage sites efficiently, reducing reliance on IT resources. Its drag-and-drop functionality enables quick and intuitive site creation. It empowers users, regardless of technical expertise, to develop sites that cater to various audiences, including citizens, partners, and employees. Experience Builder offers a comprehensive library of pre-built Lightning components that can be easily integrated into sites. These components cover a wide range of functionalities—such as analytics, content management, workflow and process automation—allowing for rapid deployment of complex features.

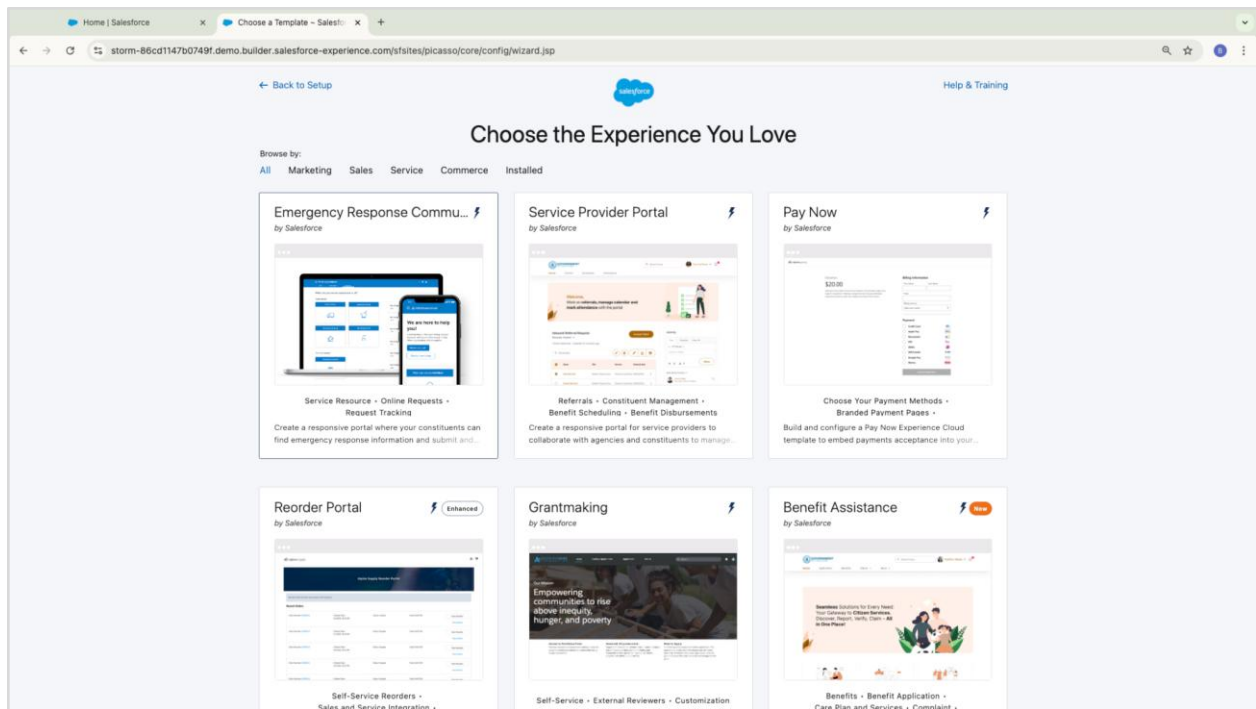


Experience Builder: Salesforce Administrators design public-facing digital experiences that take on your precise brand identity and provide users secure access to their data via self-service.

Pre-Built Templates and Themes

Agentforce Digital Experiences administrators can select from several out-of-the-box themes or create custom themes to reflect their branding. This flexibility ensures that the look and feel of the site aligns with organisational branding while enhancing user experience. These themes are also the starting point for several purpose-built business uses cases for workflows such as:

- **Benefit Assistance:** Constituents can apply for government benefits and services, view and file complaints, access care plans, and report changes in circumstances.
- **Emergency Response Management:** Citizens can request emergency assistance and get information during crises.
- **Grantmaking:** Grantmakers can post and manage funding opportunities, while grantseekers can apply for and report on grants.
- **Licenses and Permits:** Citizens can apply for, renew, and manage licenses and permits.
- **Service Provider Portal:** Providers can process referral requests, track service delivery, and collaborate with agencies and citizens.



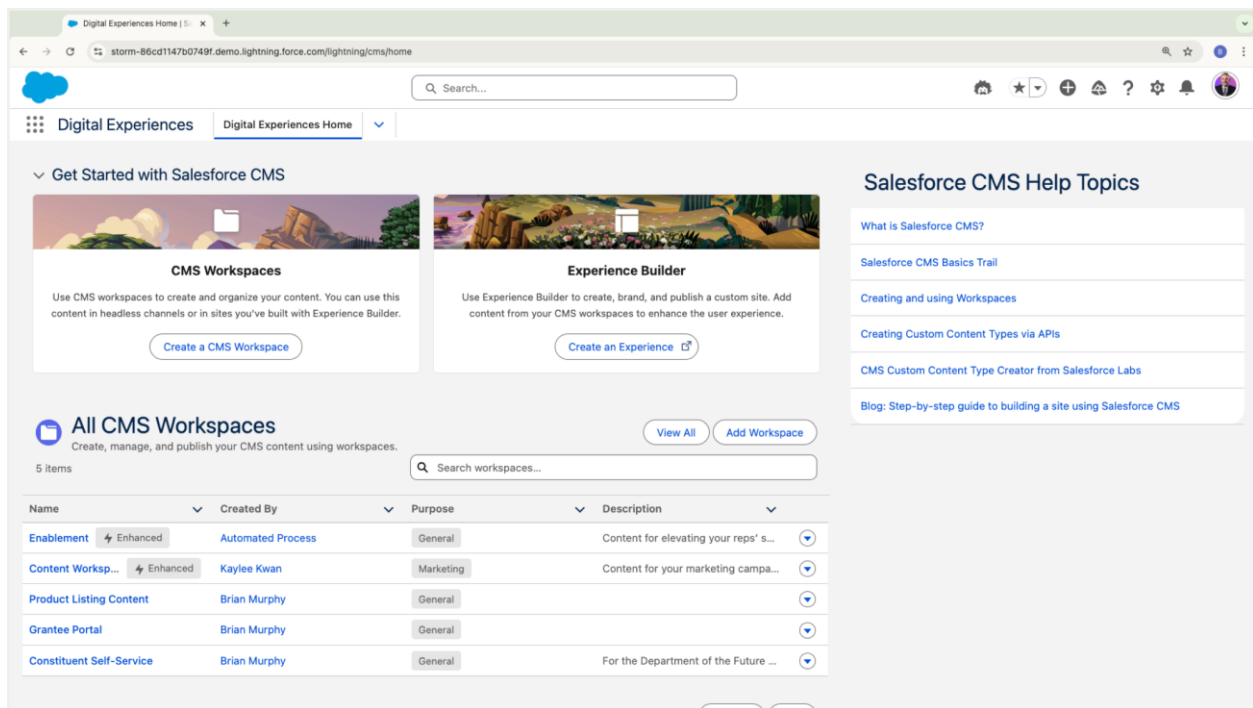
Agentforce Digital Experiences Templates: Salesforce Administrators can select from a number of pre-configured site templates for common government use cases like Benefit Assistance, Grants Management, Licensing, Permitting & Inspections, etc.

Content Management System (CMS)

Salesforce Content Management System (CMS) is a versatile and powerful tool designed to facilitate the creation, management, and delivery of content across various digital channels. Integrated seamlessly with Salesforce Agentforce Digital Experiences, it empowers organisations to build engaging and personalised experiences for their users.

- **Content Creation:** Users can easily create various types of content—documents, images, news articles, and custom types—using a point-and-click interface. This no-code approach enables both technical and non-technical users to participate in content creation without needing extensive training.
- **Centralised Content Management:** All content assets are stored in a centralised repository, allowing for easy organisation and retrieval. Users can create content collections that group related items, making it simple to manage large volumes of content.
- **Multi-channel Distribution:** Salesforce CMS enables organisations to create content once and distribute it across various channels. This includes not only Salesforce-powered sites but also external platforms through APIs, ensuring that the right content reaches the right audience wherever they are.
- **CMS Connect:** Enables organisations to connect HTML, JSON, CSS, and JavaScript to bring in content stored in external systems and display it on Agentforce Digital Experiences site pages. CMS Connect allows site admins to display headers, footers, banners, blogs, articles and other reusable content, creating a unified content experience across an organisation's many sites.

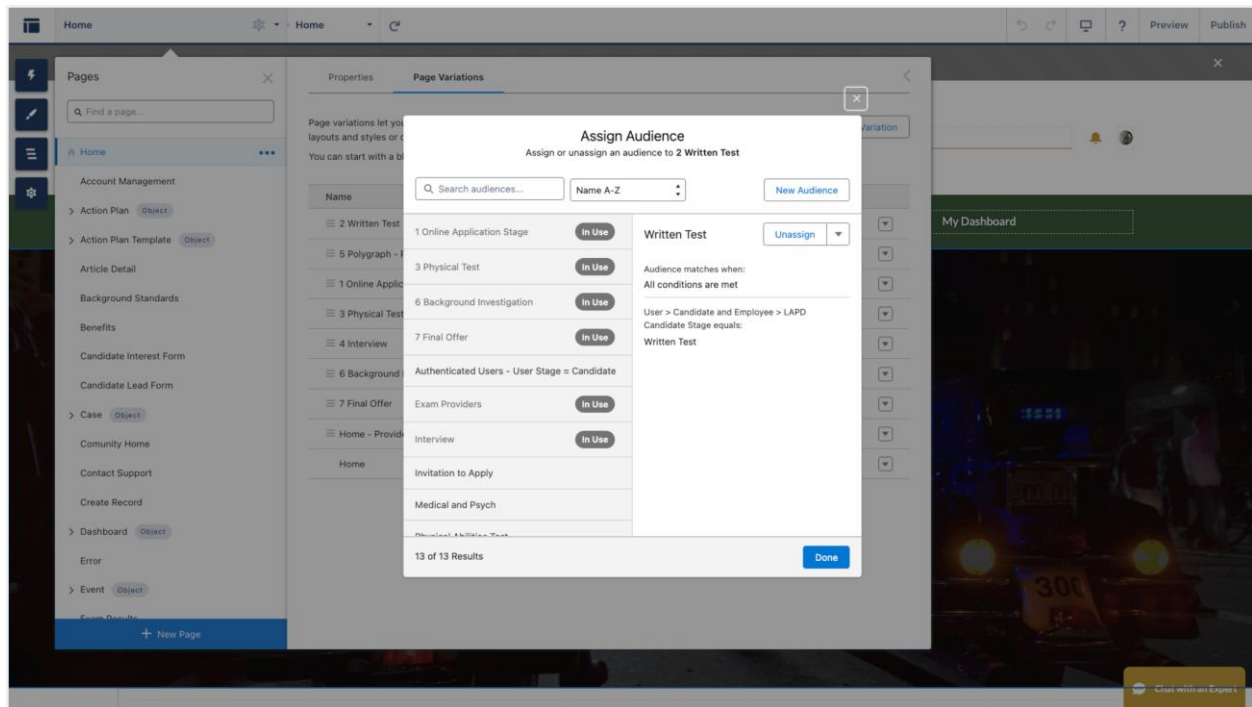
- **Personalisation:** The system leverages citizen data from Salesforce CRM to deliver personalised content experiences. For instance, organisations can transform CRM records into visually appealing banners or calls-to-action tailored to specific user preferences.
- **Content Collaboration:** Salesforce CMS supports team collaboration through defined user roles and permissions. This ensures that only authorised individuals can create or edit content while streamlining the approval processes for new materials.
- **Version Control:** The platform maintains a history of content revisions, allowing users to revert to previous versions if necessary. This feature is essential for maintaining accuracy and consistency in messaging.
- **Tight Integration with Experience Builder:** Experience Builder allows users to visually design their sites using a WYSIWYG (What You See Is What You Get) interface. Content from Salesforce CMS can be easily dragged and dropped into pages, enabling rapid site development without coding skills.



Content Management System Workspaces: By enabling easy content creation, management, and distribution while leveraging customer data for personalisation, it equips organisations with the tools needed to deliver engaging digital experiences efficiently.

Audience Targeting

Agentforce Digital Experiences allows administrators to assign specific website page components and branding sets to different audience segments. This means that certain groups can see tailored layouts or features that cater specifically to their needs or preferences. For example, a customer support portal might display different FAQs, programs or resources for government partners versus individual citizens. Or, an organisation, instead of creating multiple sites for multiple audiences, they can use content targeting to serve different versions of a page based on criteria such as geographic region such as a zip code or county. This personalised experience can encourage users to interact more frequently with the platform, driving higher engagement rates.

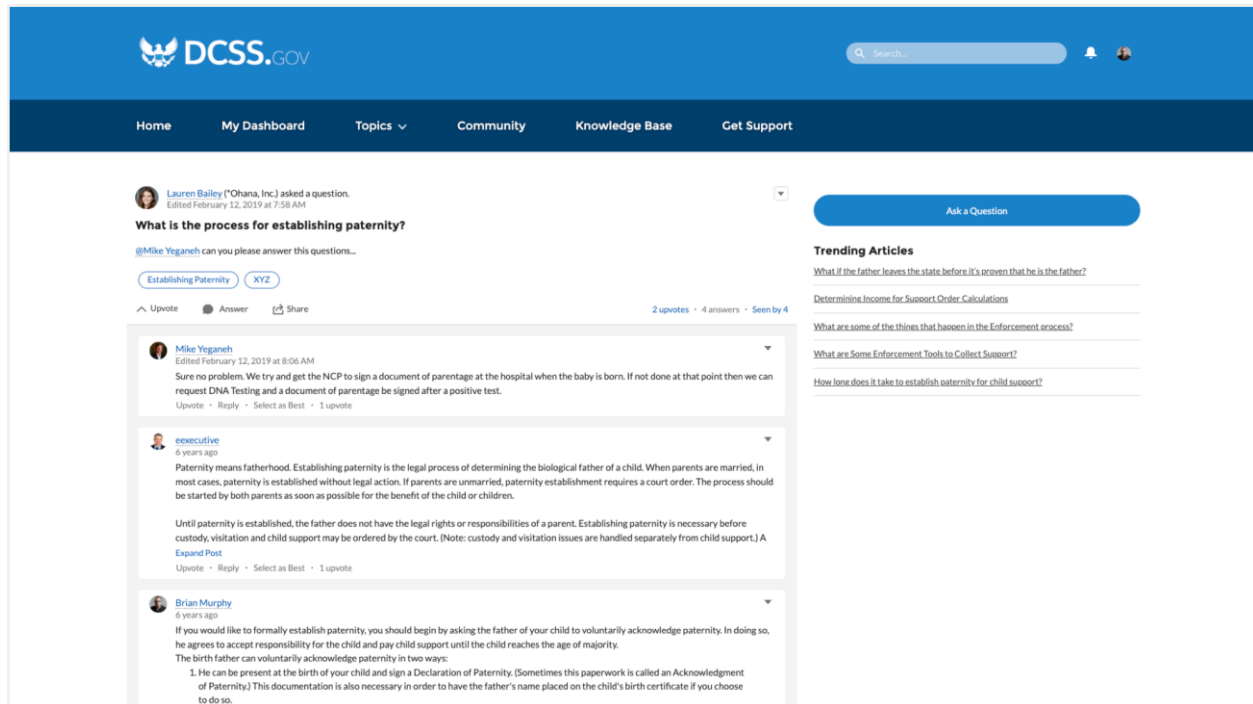


Audience Targeting: Administrators can assign different audience segments to pages (e.g. Home Page) based on a number of criteria such as zip code or county or by a profile attribute (e.g. Likes Hiking)

Community Discussions, Forums and Moderation Rules

- **User Engagement:** Salesforce Agentforce Digital Experiences includes powerful features for Community Discussions, Forums, and Moderation Rules, which facilitate user engagement and community building within digital experiences. These capabilities enable organisations to create interactive environments where users can share knowledge, ask questions, and collaborate effectively.
- **Content Creation:** Users can create discussion threads or forum posts easily, contributing to a dynamic repository of knowledge. This user-generated content enriches the community by providing diverse perspectives and solutions.
- **Searchable Knowledge Base:** The discussions and forums can be indexed and made searchable, allowing users to find relevant information quickly. This enhances the value of the community as a resource for troubleshooting and learning.
- **Topic Categorisation:** Posts can be categorised by topics or tags, making it easier for users to navigate discussions and find content that interests them. This organisation improves user experience by streamlining access to information.
- **Content Control:** Moderation rules allow administrators to set guidelines for acceptable behavior and content within the community. This ensures that discussions remain constructive and relevant, fostering a positive environment.
- **Automated Moderation Tools:** The platform may include automated moderation features that flag or filter out inappropriate content based on predefined criteria. This reduces the manual effort required from moderators while maintaining community standards.

- **Reporting Mechanisms:** Users can report inappropriate posts or behavior directly within the forums, enabling quick action from moderators. This feature empowers the community members to help maintain a respectful environment.
- **Engagement Metrics:** Moderators can access analytics on user engagement within discussions and forums, such as post views, replies, and user participation rates. This data helps in understanding community dynamics and improving engagement strategies.



Discussion Forums: Agentforce Digital Experiences Portals allow agency staff and community members to engage in discussion forums in order to provide rich community engagement

Security and Compliance

Agentforce Digital Experiences includes robust security features to protect data and ensure compliance with government standards:

- **Clickjack Protection:** Prevents malicious framing of content.
- **User Authentication:** Ensures secure access to sites and customer data.
- **Data Encryption:** Protects sensitive information.
- **Content Security Policy (CSP) and Lightning Locker:** Protects against malicious resources and vulnerabilities.

Salesforce Agentforce Digital Experiences offers a comprehensive solution for government agencies looking to extend their services to the self-service channel. Its flexibility, customisation options, and robust security features make it an ideal platform for creating accessible and efficient digital experiences.

Learn more about Agentforce Digital Experiences with this [Agentforce Digital Experiences Overview Video](#).

Mobile Publisher

Salesforce Mobile Publisher is a powerful tool that allows organisations to create custom-branded mobile applications without requiring extensive coding or app development experience. This feature is particularly beneficial for businesses looking to extend their Salesforce functionalities onto mobile devices, enhancing user engagement and operational efficiency.

With an Agentforce Digital Experiences site, we have made it easy to take that digital experience—everything from its content to its design and layout—and package it into a branded mobile app that is downloadable from the Apple App Store or the Google Marketplace.

We created the Mobile Publisher to be simple enough for Salesforce admins to transform an existing Lightning Community into a mobile app for iOS or Android. All we require is a one-page form completed with your app details—such as a description and metadata, an app icon, and splash screen images. Once the admin hits “submit”, we take care of packaging and submission to the app marketplaces. [Read more on setting up Mobile Publisher and branding your app.](#)

In addition to making it fast and easy to build beautiful apps, Mobile Publisher for Agentforce Digital Experiences automatically updates and publishes any change you make to the desktop version of your digital experience to your mobile app. It's effortless to ensure your digital experiences are consistent, no matter how your citizens access them. Check out a [Salesforce Mobile Publisher Demo](#).

Mobile Publisher for Agentforce Digital Experiences includes:

- **Pixel-Perfect Branding:** Brand your app with a custom app icon, splash screen, and app name.
- **Persistent Authentication:** Once a user logs into the community, they can close the app and reopen without being logged out.
- **Local File Access:** Users can access local files and photos right from their phone for upload into the app.
- **Push Notifications:** Users get instant alerts and updates right on their phone homescreen.
- **Security:** Offer authenticated and guest modes for unregistered users.
- **Multi-channel Updates:** Any changes made in the community are instantly updated in the mobile app.
- **SDK Free:** No third party integrations or mobile SDK is required.
- **Kiosk Mode for Barcode Scanner:** Barcode scanner gets kiosk mode, which uses the front-facing camera on stationary devices to scan badges, guests tickets, or verifying vaccine codes.
- **Access Mobile Device Calendar:** A calendar import feature lets users manage events from one location.

And because it's built on the Salesforce Platform, every mobile app is connected to the same data and processes that are updated with every citizen interaction. [Learn more about Mobile Publisher through Trailhead.](#)

Agentforce Digital Experiences 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.

Summary of the various license types can be found here:

https://help.salesforce.com/s/articleView?id=platform.users_license_types_communities.htm&type=5

* 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.

External Apps

Custom digital experiences to engage any external stakeholder, including Brand Engagement and Customer Loyalty. Limited access to CRM objects. The External Apps license can be used with personal accounts.

Customer Community

Enables you to connect customers with communities, portals, and more. Will provide the ability to have an authenticated Portal and Customer Community.

Customer Community is perfect for companies that want to create simple end user service portals where end users can view their cases, search for answers in a knowledge base, and access basic information about their accounts. It is designed to handle lots of customers—even millions—who might not log in very often, making it great for B2C organisations that need to support a large end user base with basic self-service options

Customer Community+

Enables your organisation to deliver complex portals with advanced connectivity. This license includes authenticated portal access, Customer Community features, and enhanced sharing and admin controls. It offers everything in the basic version plus powerful additions: user-created reports and dashboards, advanced collaboration tools, and self-service user management. With support for up to 300,000 users, it's ideal for distributors, partners, or enterprise clients who need deeper insights and collaboration capabilities.

Partner Community

Business-to-business experiences that need access to sales data such as partner relationship management. The Partner Community can't be used with personal accounts.

Channel Accounts

Business-to-business sites and portals that calculate their usage based on the number of partners instead of the number of individual users.

Digital Experiences for Agentforce Public Sector

We offer similar licenses for Agentforce Public Sector specific functionality too.

Customer Community

Customer Community for Public Sector provides industry-specific functionality with pre-built community access and templates for Emergency Program Management, Composable Case Management, Licensing, Permitting and Inspections, and Grants Management. It offers a ready-made foundation to quickly deliver secure, user-friendly public-facing services.

Customer Community+

Customer Community Plus for Public Sector adds advanced capabilities on top of the standard offering, with industry-specific functionality and pre-built community templates for Emergency Program Management, Composable Case Management, Licensing, Permitting and Inspections, and Grants Management. It provides a more powerful, collaborative environment for users who need deeper access and functionality.

Provider Self Service for Public Sector

Partner Community for Public Sector delivers industry-specific functionality with pre-built community access and templates designed for Provider Management use cases, enabling streamlined collaboration and secure engagement with partner organisations.

1.2. Service Features

Information sharing and collaboration are critical for government organisations to succeed. Without them, organisations are unable to adequately fulfil their mission. Now organisations can create private and secure social communities to connect with citizens, external partners, and their peers in other departments and organisations.

1. End user profile area for individuals to update information
2. Protect every digital interaction with enterprise-grade security, privacy, and compliance
3. Collaboration areas to work directly with end users
4. Integrate community experiences into any line of business application
5. Easily customise branding to extend your current website
6. Search for answers and provide knowledge articles and FAQs
7. Enhance with Agentforce - keep end users on low cost channels
8. No-code & Low-code declarative configuration, Open API integration, Training included
9. Build a complete channel management solution for effective partner collaboration
10. Use flexible templates and AI to design tailored experiences

1.3. Service Benefits

1. Service end users in a low-cost channel, encourage channel shift
2. Deflect avoidable contact with easy self-service
3. Reduce complex, lengthy, confusing forms with simpler guided processes
4. Re-use the same processes your end users do
5. Increased adoption from easy-to-use UI
6. All your data in one place, deliver personalised content fast

7. Scale with easy-to-use tools, powerful AI and world class apps
8. Enhanced digital experiences with AI directly within your site
9. Engage any audience fast with interactive sites, apps and portals
10. Unify service portal and Agentforce experience that syncs in real-time

1.4. Main components & Functions of this service

Experience the powerful features of Salesforce Experiences to learn faster and perform better. Please review <https://www.salesforce.com/uk/communities/features/> for further information about how the features of our Community Experiences can support and transform your citizen, department, agency or team's experiences. Some aspects of these features are also summarised below.

Grants and portfolio management

Grants and programs are part of the charter of virtually every government organisation. Yet too many are still using paper-based systems to manage important information. Enable electronic submissions and mobile field reporting, like Utah's Department of Community and Culture, which dramatically increased effectiveness and efficiency by transforming the grants management process and focusing on achieving results.

Government support schemes

Schemes can be configured, rather than built much faster and easier than on traditional platforms. For example, the UK Department for Energy Security and Net Zero (previously BEIS) were charged with delivering elements of the government's Energy Support Schemes at pace between December 2022 and February 2023. Using Salesforce's platform and Agentforce Digital Experiences they were able to design and build a solution within mere weeks. As well as accelerating the pace of change, getting much needed help to citizens at the speed it was needed, use of the Salesforce platform ensured security and scalability, made it easier to identify fraud and delivered value for money. Subsequent portals targeting businesses were delivered in similar rapid timescales., responding to the urgency of the need. The Energy Bill Discount Scheme for businesses, successfully processed 9000 energy applications in just four weeks, far exceeding the levels estimated by the policy teams' research, and was pivotal for kick-starting the department's help to keep UK businesses afloat at a critical time for the economy.

Project and program management

When you connect inputs—including time, funding, and staff—with outputs—like events, deliverables, and services delivered—you can see what makes the biggest impact and get more done. Like New York City's Department of Health and Mental Hygiene, Office of Emergency Preparedness and Response, which enhanced project and fiscal management functions to better manage citywide public health preparedness.

Citizen and constituent management

Better public service begins with stronger relationships, which require effective relationship management and engagement platforms. Leading government innovators are using the world's leading relationship management solution to be more productive and more collaborative in the social era. Don't just meet expectations—surpass them and serve and delight constituents like never before.

Partner and vendor management

Regardless of what area of government you're in, partners and vendors play a key role achieving your mission. More effective and efficient relationship management means reduced costs, higher quality, and a better service from the partner or vendor.

2. Information Assurance

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

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

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

In accordance with the EU Data Protection Directive and implementing national legislation, the Salesforce Processor BCR (Binding Corporate Rules) is intended to provide an adequate level of protection for Personal Data during international transfers within the Salesforce Group made on behalf of Customers and under their instructions, further information is available here <https://secure.sfdcstatic.com/assets/pdf/misc/Salesforce-Processor-BCR.pdf>

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

In addition, we currently hold the following certifications:

Geographical Recognition

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

Global Audit Compliance

- ISO 27001,27017, 27018, 9001, 42001

- SSAE 18/ISAE 3402
- SOC-1
- SOC-2
- PCI-DSS

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

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

Accessibility

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

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

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

that any bugs or regressions are identified and remediated promptly in alignment with every release.

- Consistency: Our enterprise adheres strictly to WCAG 2.2 Level AA as the consistent standard for all accessibility compliance initiatives.

3. Data Backup / Restore and Disaster Recovery

Redundancy and Scalability

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

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

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

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

Disaster Recovery

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

Product-specific information is available in the Security, Privacy and Architecture (SPARC) documentation for the respective services available on our website

(<https://www.salesforce.com/company/legal/trust-and-compliance-documentation/>), and customers can view detailed policy documentation at <https://compliance.salesforce.com/en/disaster-recovery-bcp>.

Backup

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

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

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

- Data Export Service: Manual or scheduled exports of your data via the UI. Export Backup Data from Salesforce:
https://help.salesforce.com/s/articleView?id=xcloud.admin_exportdata.htm&type=5.
- Data Loader: Manual on-demand exports of your data via the API. Export Data:
https://help.salesforce.com/articleView?id=exporting_data.htm&type=5.
- Report Export: Manual on-demand exports of your data via reports. Export a Report:
https://help.salesforce.com/articleView?id=reports_export.htm&type=5.
- Salesforce Backup and Restore product:
<https://www.salesforce.com/platform/data-backup-recovery/>

Restore

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

As an add-on solution, Salesforce Backup 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.

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

4. On-Boarding

4.1. Deployment

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

4.2. Configuration and Customisation

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

Configuration Options (Point-and-Click)

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

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

Process Automation: Automating tasks and processes using declarative tools like Salesforce Flow and Approval Processes.

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

Customisation Options (Code-Based)

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

Apex Code: Writing custom logic, classes, and triggers that execute before or after specific events (e.g., record insertion or deletion).

User Interface Development:

Building dynamic web applications and enhancing UIs with Lightning Web Components (LWC) and Visualforce pages.

Modifying the UI with CSS for specific styling requirements.

Integration Development: Building complex, seamless integrations with third-party systems and external data sources using various APIs.

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

5. Off-Boarding

Off-boarding from the service is as simple as exporting and downloading your data and meta-data if you choose to do so. We provide your data in an industry standard readable format to make it as easy as possible for you to migrate to another service if you wish to do so. For further details of data extraction and removal, please refer to section 5.2 below.

5.1. Termination

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

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

5.2. Data Extraction and removal

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

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

Salesforce understands the intentions of G-Cloud, and is keen to support customers' adoption of cloud technology, however that should also include knowing how to leave a given cloud technology. Salesforce has an exit strategy paper that can be used to help plan a path away from

Salesforce. Notwithstanding that Salesforce has one of the lowest attrition rates in the industry, we remain committed to your success. Continued investment is how we sustain 3 upgrades every year and a constant delivery of new innovation in every update.

6. Pricing Summary

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

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

7. Service Constraints

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

Usage Limits

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

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

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

8. Service Management

Your success is our success

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

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

Standard Success

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

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

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

Premier Success

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

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

Benefits include:

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

Specialised Guidance

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

Expert Assistance

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

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

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

Specialised Guidance

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

Signature Success

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

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

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

Customer Success Manager (CSM)

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

Proactive services

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

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

Accelerators

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

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

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

9. Customer Responsibilities

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

Management

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

Compliance

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

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

Usage Restrictions & Information Security

You must:

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

You must not:

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

10. Client-side Technical Requirements

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

Browser requirements

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

Internet access

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

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

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

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

11. Planned Maintenance Windows

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

There are two types of maintenance at Salesforce:

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

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

Patch releases and emergency releases are used to deliver scheduled and ad hoc application fixes and are typically seamless to customers. Whenever possible, patches and emergency releases are deployed during off-peak hours and without downtime. You can see our preferred maintenance schedule at

https://help.salesforce.com/apex/HTViewSolution?id=000176208&language=en_US or learn more at <http://trust.salesforce.com>

12. Training

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

Training also listed on the Digital Marketplace.

Further information can also be found here:

<https://www.salesforce.com/uk/services/learn/overview/>

13. Data Centre Locations

For the Salesforce Services (services branded as Force.com, Site.com, 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.