Softcat Plc

Salesforce Agentforce for Industries (formerly Industry Solutions)

- Cloud Software - Digital Marketplace - Lot 2b

- G-Cloud 15

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Table of Contents

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

Salesforce Agentforce for Industries

1. Health Cloud - Service Description

1.1. Service Overview

Salesforce Industry Solutions [Former name] is now [Agentforce for Industries]. You may continue to see the former name in our application and documentation.

Salesforce Industry Solutions use the power of the cloud, social and mobile technologies to give specific industry deliverables such as healthcare professionals so they gain the tools they need to collaborate more efficiently, understand patients more deeply, and build 1-to-1 relationships across entire care journeys.

Built on the world's #1 CRM platform
Health Cloud is an engagement platform that helps healthcare, public health, and life sciences organisations connect with their patients and members in a whole new way to drive wellness across the entire health journey, building on the innovation of the world's #1 CRM. Health Cloud aims to build stronger relationships with better service, reduce avoidable readmissions by creating a collaboration based post-discharge experience including ongoing care at home, help onboard members and prevent unnecessary utilisation, and empower patients to stay compliant with their therapies through support services that cover adherence and educational support. It accomplishes this by providing a complete view of the patient/member, intelligent care collaboration, and connected engagement.

1.2. Service Features

1. Comprehensive Patient View - Patient 360 with Clinical (FHIR R4 aligned) and Non-Clinical data, including Health Timeline, Patient Household and Care Team Map
2. Care Team Productivity: Care Management including Care Plans, Care Gaps, Tasks and Assessments (Survey Functionality).
3. Intelligent Appointment Management: Schedule appointments with or without EMR and reduce Did Not Attend rates
4. Home Health : Manage care professionals providing care at home with optimised workforce scheduling and mobile access to Care Plans and Tasks
5. Provider Network Management: Recruit, Onboard and manage relationships with healthcare Providers with a unified view and guided flows
6. Benefits & Eligibility Verification: Patient insurance plan eligibility in real time
7. Intelligent Document Automation: Automate document intake and extraction (eg Referral Management)
8. Intelligent Sales for Med Tech: Field inventory Management, Cycle Counting
9. Benefits Sales and Administration: Sell and manage insurance for individual and group
10. Utilisation Management processes to streamline care requests including prior authorizations, admissions and appeals

1.3. Service Benefits

1. Improve health outcomes

2. Reduce cost to deliver care
3. Focus on clinical and non-clinical factors for holistic care
4. Care collaboration across the care delivery continuum outside the hospital
5. Automate processes to reduce time to care
6. Improve patient engagement and experiences
7. Provider Matching and scheduling appointment to reduce no shows
8. Increase productivity of providers and clinical staff
9. Improve Patient Services reducing cost and enrolling more patients
10. Streamlined end-to-end sales and operational process from generating leads to fulfilling orders for Med Tech

1.4. Main components & Functions of this service

Salesforce Health Cloud allows care teams to:

- Understand patients like never before with a holistic Patient View (Clinical and Non Clinical)
- Supercharge care teams with intelligent care collaboration
- Drive relationships anytime, anywhere with a personalised end-to-end engagement

Complete Patient View
Salesforce Health Cloud provides a complete view of the patient:

- View rich, contextual patient profiles
- Access collaborative care network and longitudinal health timeline
- Integrate patient data from electronic health records or other clinical systems

With a complete view of the patient, you have easy access to the clinical and non-clinical patient information including current conditions and medications, social and environmental factors, appointment history and communication preferences. Salesforce Health Cloud brings in information from electronic health records to make data easily referenced, providing a 360-degree view of the patient. View detailed insights about a patient's medication including dosage, route and frequency, and manage their medication regimen. With medical devices and wearables integrated directly to Salesforce Health Cloud, you can even gather data from at-home devices, such as glucose levels, sleep patterns and activity measures.

Salesforce Health Cloud delivers a holistic and real-time view of each patient's health, giving healthcare providers the information they need to provide care that improves outcomes for patients and populations.

Intelligent Care Collaboration
Salesforce Health Cloud makes it possible for healthcare providers to:

- Easily prioritise tasks across all their patients' needs
- Segment and manage patient populations, including risk stratification
- Map personal and professional caregiver networks
- Customised care plan templates to track actions and measure effectiveness across populations
- Track gaps in care and prioritise health activities to improve care coordination
- Orchestrate complex care workflows

Salesforce Health Cloud features a 'Today' page to provide a holistic view of your patients and the most critical tasks related to your full patient population. With the Today view, you can make care decisions efficiently by browsing the customised care plan for tasks and quickly acting on them. Users are also able to identify high-risk patients and proactively provide targeted care with intuitive real-time risk stratification reporting. Import evidence based templates, customise the care plans, and track patient actions and measure effectiveness across populations. Leverage AI to predict trends, such as patient likelihood to attend appointments, and streamline the delivery of care pathways.

And with the power of the Salesforce Platform, you can review all internal conversations that involve your patients, making care coordination and patient handoffs easier and more efficient. You can even map personal and professional care networks, so you can assign ownership of health goals to anyone on the care team — including the patients or their families. Salesforce Health Cloud empowers you to easily manage your full patient populations, personalise every interaction and support better outcomes.

Manage complex care workflows such as tests and pre-consultation assessments to ensure patients successfully attend appointments. Advanced Therapy Management allows you to schedule multi-step appointments across multiple sites, and provides flexible workflows that automatically update and execute stages and tasks in complex care delivery.

Intelligent Appointment Management
Health Cloud now helps minimise appointment no-shows and reduce administrative costs with the introduction of Intelligent Appointment Management.

- Helps patients schedule appointments through the channel of their choice: Agent-assisted or self-service, to expand access to care and improve satisfaction
- Offers patients the option to independently schedule their own appointment via their laptop, desktop, or mobile device
- Simplifies agent-assisted scheduling and streamlines operations with a single console integrated with multiple scheduling systems

Home Health
Field Service Lightning enables you to manage a mobile workforce delivering service in patients' homes or in areas across your facilities. With Field Service Lightning in Health Cloud, field care providers have access to patient data and are able to interactively update goals and tasks in the patient's care plan from their mobile Android or iOS devices while care organisations can manage and optimise the scheduling of field care providers.

Provider Network Management
With the launch of Provider Network Management, Health Cloud now serves as a system of engagement for contract and reimbursement management to providers and payers, resulting in the best access to care and patient experience via financially-sound arrangements that support flexible network models and best patient outcomes.

- Customise recruitment campaigns and workflows to help recruiting specialists segment and assess candidates quickly
- Enable providers to see the status of their applications and conveniently manage their profiles, member data, inquiries, and care processes — with intuitive, easy-to-use portals
- Strengthen provider relationships through a more transparent network management process to shorten provider turnaround time during onboarding

Behavioural Health & Crisis Support
Engage with empathy for optimal, whole-person care services. Optimise crisis centre operations to promote urgent access to safe, quality mental healthcare, from anywhere. The pre-built behavioural health app brings together standard workflows, assessments and facility search in a single place.

Benefits & Eligibility Verification
Health Cloud now offers benefits verification as a service to Providers, Pharma, and MedTech companies to improve the patient experience and expand access to care. This feature automates a bulk of the verification process, supports a variety of service types and benefit models, and seamlessly integrates this step into the end-to-end patient access workflow.

- Perform benefit verification directly on the patient record to ensure accuracy
- Streamline the verification process by integrating with third-party benefits and eligibility services
- Check benefits for medical services, pharmacy, and medical equipment to ensure patients have the coverage prior to their visit/service

Intelligent Document Automation
Health Cloud now offers streamlined intake for patient services on a digital, HIPAA-compliant workspace, complete with an out-of-box document automation solution integrated with AWS Textract.

- Manage all patient and member forms from one workspace, from intake through processing
- Documents are automatically routed to the right queue for quick review and processing
- Automate manual data entry by extracting text from faxed documents and mapping that data to Salesforce records.

Intelligent Sales for MedTech
Health Cloud now offers an even more exceptional engagement experience for MedTech Sales teams and the providers they serve, through streamlining the end-to-end sales and operational process from generating leads to fulfilling orders.

- Easily set up and assign cycle counts at specific inventory locations to specific sales reps. Specify products to be included in the cycle count
- Sales reps can seamlessly initiate an assigned or ad-hoc cycle count. Capture current inventory count using a barcode scanner to scan items individually or manually enter the count of inventory
- Leveraging flows, organisations can define actions that sales reps can execute real-time for mismatch in cycle count, like mark items as lost or other appropriate statuses

Personalised End-to-End Engagement
Salesforce Health Cloud makes healthcare information more accessible, supporting workflows and care outcomes:
- Collaborate seamlessly with care teams and patients
- Engage on any device, anywhere
- Omni-channel experience allowing patients to engage through their channel of choice

With Salesforce Health Cloud, care coordinators can securely engage with patients and caregivers. Organisations can easily build custom branded mobile apps for patients and members to drive digital engagement and empower health consumers to stay on top of health goals, get faster access to information, adhere to treatment plans and take control over their own health journey.Increase access to care by enabling Virtual Care between consumers and healthcare providers. Make Video Visits even more convenient for patients by providing self-service scheduling and automated appointment notifications.

2. Financial Services Cloud - Service Description

2.1. Service Overview

Built on the world's #1 CRM platform

Financial Services Cloud transforms how financial institutions connect with their clients by providing a unified view of the entire customer relationship. Built on Salesforce's trusted CRM platform, it enables banks, wealth managers, insurance companies, and other financial service providers to deliver personalized experiences while maintaining compliance and security. The platform connects every touchpoint - from initial prospect engagement through complex financial planning - creating deeper, more meaningful relationships that drive growth and client satisfaction.

2.2. Service Features

1. **Relationship Mapping**: Visualize complex household and business relationships
2. **Agentforce for Financial Services**: AI-powered client assistance and advisory support
3. **Intelligent Document Processing**: Automate document classification and data extraction
4. **Compliance Management**: Built-in regulatory compliance and audit trails
5. **Financial Account Management**: Comprehensive view of all client accounts and products
6. **Goal-Based Financial Planning**: Track and manage client financial objectives
7. **Referral Management**: Streamline internal referrals between specialists
8. **Client Onboarding**: Automated workflows for new client acquisition
9. **Investment Portfolio Tracking**: Real-time portfolio performance monitoring
10. **Risk Assessment**: Automated risk profiling and monitoring
11. **Action Plans**: Structured task management for client engagement
12. **Mobile Banking Integration**: Seamless mobile app connectivity

2.3. Service Benefits

1. Increase client retention rates
2. Accelerate revenue growth per client
3. Improve regulatory compliance scores
4. Reduce operational costs significantly
5. Enhance advisor productivity substantially
6. Strengthen client satisfaction metrics
7. Streamline cross-selling opportunities effectively
8. Minimize compliance risks proactively

2.4. Main components and functions of this service

Agentforce for Financial Services: AI-powered client assistance and advisory support

Agentforce delivers industry-specific AI agents with unmetered employee capacity, including Financial Advisor Assistance, Banking Service Assistance, Collections Assistance, and Insurance Service Assistance. These agents handle complex financial queries through conversational AI while maintaining built-in compliance guardrails and regulatory standards. Pre-configured templates eliminate customization needs and enable automated workflow triggers for multi-step processes. Institutions can scale personalized service delivery while ensuring every AI interaction adheres to financial services compliance requirements.

Relationship Mapping: Visualize complex household and business relationships

The Actionable Relationship Center provides unified views of complex relationship networks with hierarchical management across Legal, Sales, Credit, and Advisor relationships. Interactive visual graphs enable effortless navigation of client networks with automated relationship discovery through data ingestion. Cross-entity data aggregation identifies cross-selling opportunities and ensures consistent service across relationship hierarchies. The system maps interconnected entities across multiple institutions, providing complete financial ecosystem visibility for informed advisory conversations.

Intelligent Document Processing: Automate document classification and data extraction

AI-powered extraction automatically processes KYC documents, loan applications, and financial statements while reducing manual data entry and improving accuracy. Automated document tracking, classification, and validation ensure completeness and regulatory compliance with comprehensive audit trails. Integration with existing document management and core banking systems creates unified document ecosystems supporting all channels. The system accelerates processing times while maintaining strict regulatory standards and version control requirements.

Process Compliance Navigator: Built-in regulatory compliance and audit trails

Embedded compliance controls integrate directly into business processes for humans and AI agents, ensuring automatic regulatory adherence without operational friction. The unified Business Compliance Suite manages regulations, policies, controls, and analytics while adapting to changing regulatory environments. Automated disclosure management and comprehensive audit trails capture all interactions and decisions with real-time compliance monitoring. The system generates regulatory reports automatically and provides proactive alerts for potential compliance issues.

Financial Account Management: Comprehensive view of all client accounts and products

Unified aggregation creates single views across all financial products through real-time integration with core banking and custodial systems. Cross-product insights identify account relationships while automated alerts provide proactive notifications for changes and opportunities. Account health scoring uses predictive analytics to assess risk and growth potential across client relationships. Real-time synchronization ensures consistent, current data across all systems and channels for informed decision-making.

Goal-Based Financial Planning: Track and manage client financial objectives

Structured frameworks capture and track client objectives with automated life event management that adjusts plans based on major changes. AI-powered suggestions provide personalized recommendations while automated updates dynamically adjust strategies based on market changes. Predictive modeling forecasts goal achievement probability and delivers tailored optimization advice based on current progress. Real-time monitoring with milestone tracking ensures client-advisor alignment throughout the relationship lifecycle.

Client Onboarding: Automated workflows for new client acquisition

Digital workflows streamline account opening with automated KYC/KYB processes, intelligent document collection, and identity verification achieving 24-minute average onboarding. Omnichannel consistency allows clients to start and complete onboarding across different channels without losing progress. Automated decisioning processes straightforward applications while escalating complex cases with intelligent exception handling. Personalized welcome journeys drive early product adoption through targeted post-onboarding engagement sequences.

Investment Portfolio Tracking: Real-time portfolio performance monitoring

Live performance updates provide current portfolio values with asset allocation analysis and automated rebalancing alerts. Performance attribution analysis explains return drivers while AI generates optimization recommendations based on market conditions. Market impact analysis and benchmark comparisons provide context for portfolio performance discussions. Predictive analytics forecast future performance and risk metrics, enabling informed investment decisions and strategic planning.

Referral Management: Streamline internal referrals between specialists

Intelligent routing automatically assigns referrals based on client needs and specialist expertise while AI identifies cross-selling opportunities across business lines. Warm handoff processes ensure seamless specialist transitions with complete referral visibility and outcome tracking. Performance analytics provide insights on success rates and revenue attribution for optimal referral pattern identification. Automated follow-up and commission management ensure systematic outcome tracking and proper compensation attribution.

Risk Assessment: Automated risk profiling and monitoring
Real-time credit scoring integrates with credit bureaus while comprehensive profiling evaluates clients across multiple data points including financial history and market exposure. Continuous monitoring with automated alerts enables proactive risk management when profiles change or thresholds are exceeded. AI models predict churn probability and default risk while assessing market-related risks impacting portfolios. Built-in regulatory compliance ensures risk management activities meet requirements while protecting institutions and clients from regulatory issues.

3. Nonprofit Cloud - Service Description

3.1. Service Overview

Built on the world's #1 CRM platform, Nonprofit Cloud transforms how nonprofit organizations connect with donors, participants, volunteers, and stakeholders by providing a comprehensive, AI-powered platform for fundraising, program delivery, volunteer management, and impact measurement. Built on Salesforce's trusted CRM platform, it enables nonprofits, foundations, and social good organizations to move beyond fragmented legacy systems to an integrated solution that supports the entire mission lifecycle from donor acquisition through program delivery and outcome tracking. The platform unifies stakeholder data across all touchpoints while automating administrative tasks and enabling strategic decision-making through advanced analytics and industry-specific AI agents that accelerate mission impact and operational efficiency.

3.2. Service Features

1. **Agentforce for Nonprofits**: AI-powered agents for prospect research, participant management, volunteer capacity management
2. **Fundraising Operations & High-Touch Fundraising**: Comprehensive donor relationship management from acquisition through stewardship with gift processing automation
3. **Program Management & Case Management**: Complete service delivery platform with participant tracking and case plans.
4. **Volunteer Management**: End-to-end volunteer lifecycle management that supports flexible volunteering with capacity planning, shift management, and engagement tracking
5. **Grantmaking Suite**: Full grantmaking lifecycle from application processing through disbursement tracking and outcome reporting
6. **Outcome Management:** Impact measurement and reporting framework for demonstrating program effectiveness to funders and stakeholders
7. **Accounting Subledger:** Supports consolidating financial data between Salesforce CRM and your accounting system helping create a clear picture of where funds are received, paid and allocated.
8. **Data Cloud Integration**: Unified data platform connecting all stakeholder interactions with real-time analytics and AI grounding
9. **Experience Cloud**: Self-service portals for donors, volunteers, and program participants with mobile-optimized experiences
10. **Business Rules Engine & Process Automation**: Configurable workflows for eligibility determination, program enrollment, and compliance management

3.3. Service Benefits

1. Increase fundraising efficiency significantly
2. Reduce administrative burden substantially
3. Accelerate program delivery and enrollment
4. Improve volunteer retention and engagement
5. Enhance compliance with funder requirements
6. Drive operational cost savings measurably
7. Enable data-driven impact measurement consistently
8. Scale mission delivery without proportional staff increases

3.4. Main components and functions of this service

Salesforce Nonprofit Cloud allows development officers, program managers, case managers, volunteer coordinators, and nonprofit executives to deliver exceptional stakeholder experiences while maintaining operational efficiency and regulatory compliance across the entire mission delivery ecosystem.

Agentforce for Nonprofits: AI-powered agents for prospect research, participant management, volunteer capacity management.

Agentforce for Nonprofits delivers industry-specific AI agents with unmetered capacity for employee-facing use cases, including Prospect Research agents that summarize wealth capacity and philanthropic milestones to accelerate major gift preparation, Participant Management agents that streamline administrative tasks like note-taking, referrals, and goal updates after client meetings, and Volunteer Capacity & Coverage agents that identify unfilled shifts and match volunteers based on skills and availability. These agents leverage conversational AI to handle complex nonprofit workflows while maintaining built-in compliance guardrails and data security requirements essential for nonprofit operations. The agents integrate seamlessly with Nonprofit Cloud's comprehensive stakeholder data foundation to provide contextual, accurate responses that deflect routine administrative tasks and enable staff to focus on mission-critical relationship building and program delivery activities rather than paperwork and data entry.

Fundraising: Comprehensive donor relationship management from acquisition through stewardship with gift processing automation.

The fundraising platform provides end-to-end capability for managing the complete donor lifecycle including mass-market fundraising with outreach source codes and segmentation, high-touch major gift management with portfolio tools and donor profiles, and comprehensive gift processing with batch gift entry, pledge management, and automated recurring payment setup. Advanced features include soft credit tracking for collaborative fundraising efforts, gift stewardship workflows for appropriate donor recognition, and integrated campaign management that connects fundraising activities with program outcomes. The system supports complex multi-year pledge processing, tribute gift management, and automated donor acknowledgments while providing real-time fundraising analytics and forecasting capabilities that help development teams optimize their strategies and exceed fundraising targets.

Program Management & Case Management: Complete service delivery platform with participant tracking, case plans, and outcome measurement.

Comprehensive program delivery capabilities include participant enrollment and eligibility determination through configurable business rules, case plan creation from templates with personalized goal setting, and comprehensive case management workflows that track client progress through service delivery milestones. The platform supports benefit disbursement tracking, referral management to external and internal services, and automated documentation of client interactions through timeline views and interaction summaries. Advanced program management features include capacity planning for service delivery, and real-time reporting on program performance metrics that demonstrate impact to funders and enable continuous program improvement based on outcome data.

Volunteer Management: End-to-end volunteer lifecycle management with capacity planning, shift management, and engagement tracking.

The volunteer management platform provides complete oversight of volunteer operations including volunteer recruitment and onboarding workflows, skills-based matching for optimal volunteer placement, and comprehensive shift scheduling. Advanced features include volunteer portal capabilities for self-service shift signup and schedule management, automated communication workflows for shift reminders and updates, and volunteer recognition programs that track service hours. The Volunteer Capacity & Coverage agent specifically helps volunteer coordinators identify critically low-capacity shifts and suggests qualified volunteers based on availability, skills, and location preferences, while bulk update capabilities streamline volunteer initiative management across large volunteer networks.

Grantmaking Suite: Full grantmaking lifecycle from application processing through compliance tracking and outcome reporting.

Comprehensive grantmaking capabilities include application form framework with custom intake workflows, grant review and scoring processes with collaborative decision-making tools, and award management with contract generation and compliance tracking.

The platform supports grantee portal functionality for self-service application submission and progress reporting, automated payment scheduling and disbursement tracking, and comprehensive grants analytics that provide insights into funding patterns and program effectiveness. Advanced features include mobile-friendly form design for accessibility compliance, attachment management systems for supporting documentation, and an accounting subledger that supports reconciliation with accounting systems for seamless financial reporting to foundation boards and regulatory authorities.

Outcome Management: Impact measurement and reporting framework for demonstrating program effectiveness to funders and stakeholders.

Structured outcome tracking enables nonprofits to define measurable goals aligned with their theory of change, collect outcome data throughout service delivery, and generate compelling impact reports for diverse stakeholder audiences. The platform provides configurable outcome frameworks that support both quantitative metrics and qualitative storytelling, automated data collection workflows that reduce manual reporting burden, and dynamic dashboards that provide real-time visibility into program performance against targets.

Advanced analytics capabilities enable trend analysis across multiple programs, comparative effectiveness studies, and predictive modeling to identify interventions most likely to achieve desired outcomes, while automated report generation ensures consistent and timely funder reporting that demonstrates accountability and drives continued funding support.

Accounting Subledger & Financial Operations: Supports consolidating financial data between Salesforce CRM and your accounting system helping create a clear picture of where funds are received, paid and allocated. The accounting subledger provides nonprofit-specific financial management including fund accounting with automatic allocation across multiple funding sources, grant compliance tracking with reconciliation workflows that connect fundraising activities with accounting systems.

Data Cloud for Nonprofits: Unified data platform connecting all stakeholder interactions with real-time analytics and AI grounding.

Salesforce Data Cloud enables the unification of comprehensive stakeholder analytics across fundraising, programs, and volunteer engagement, creating unified profiles that connect donor giving patterns with program participation and volunteer services.

The platform provides real-time data synchronization across multiple touchpoints, advanced segmentation capabilities for targeted communications, and predictive analytics that can be used to identify donors likely to lapse or volunteers at risk of disengagement. Zero-copy architecture enables seamless integration with external data sources including wealth screening services, demographic databases, and government data sources while maintaining strict data governance and privacy controls essential for nonprofit operations and donor trust.

Experience Cloud Integration: Self-service portals for donors, volunteers, and program participants with mobile-optimized experiences.

Comprehensive portal capabilities provide branded, mobile-optimized experiences for all stakeholder types including donor portals for gift management and impact tracking, volunteer portals for shift signup and hour logging, and participant portals for program applications and progress monitoring.

The platform supports single sign-on integration for seamless user experiences, customizable dashboards that provide relevant information for each user type, and automated workflow triggers that respond to portal activities. Advanced features include multilingual support for diverse communities and accessibility compliance for inclusive design, while integration with marketing automation enables personalized communication sequences that drive continued engagement across all stakeholder relationships.

Business Rules Engine & Process Automation: Configurable workflows for eligibility determination, program enrollment, and compliance management.

The flexible business rules engine enables nonprofits to model complex eligibility criteria, automate decision-making processes, and ensure consistent application of organizational policies across all programs and services.

Example use cases of business rules engine include real-time eligibility verification during intake processes, automated referral generation based on client needs and program availability, and compliance monitoring workflows that ensure adherence to funder requirements and regulatory standards.

4. Energy & Utilities Cloud - Service Description

4.1. Service Overview

Built on the world's #1 CRM platform, Energy & Utilities Cloud transforms how energy companies connect with customers, assets, and field operations by providing a comprehensive, AI-powered platform that delivers personalized experiences across the entire energy ecosystem. Built on Salesforce's trusted CRM platform, it enables utilities, renewable energy providers, and energy services companies to move beyond legacy systems to an integrated solution that supports customers from initial connection through ongoing energy management and field operations. The platform unifies customer, asset, and operational data while automating complex processes and enabling strategic decision-making through advanced analytics and industry-specific AI agents that accelerate digital transformation and operational efficiency.

4.2. Service Features

1. **Agentforce for Energy & Utilities**: AI-powered agents for customer service, sales assistance, energy advisory, field operations, and labor cost optimization.
2. **Energy Customer Service Console**: Comprehensive 360-degree customer views with billing insights, service agreements management, and omnichannel engagement
3. **Intelligent Grid & Network Connections**: End-to-end connection management from application through field orchestration with automated quoting and contracting
4. **Field Service Plus for Energy & Utilities**: Asset-centric field service with labor cost optimization, timesheet automation, and proactive maintenance capabilities

5. **Revenue Cloud for Energy & Utilities**: Configure, price, quote platform with tariff comparison, multi-site quoting, and energy-specific product catalog
6. **Clean Energy Programs Management**: Program application management, contractor engagement, and compliance tracking for energy efficiency initiatives
7. **Connected Assets & IoT Integration**: Asset health monitoring, predictive maintenance, and real-time telemetry data processing with Data Cloud integration
8. **Energy Advisory Services**: AI-powered tariff recommendations, consumption insights, and personalized energy program suggestions
9. **Data Cloud for Energy & Utilities**: Pre-built data kits for consumption insights, asset monitoring, and unified customer-asset-work data models
10. **Emergency & Outage Management:** Incident detection, automated field dispatch, drone integration, and multi-channel customer communications

4.3. Service Benefits

1. Increase first-call resolution rates significantly
2. Reduce operational costs through automation
3. Accelerate revenue growth per customer
4. Improve field workforce productivity
5. Enhance customer satisfaction scores
6. Streamline regulatory compliance processes
7. Drive proactive asset maintenance strategies
8. Scale digital transformation initiatives effectively
9. Rapidly resolve service incident disruptions

4.4. Main components and functions of this service

Salesforce Energy & Utilities Cloud allows customer service representatives, field technicians, sales managers, operations coordinators, and energy advisors to deliver exceptional customer experiences while maintaining operational efficiency and regulatory compliance across the entire energy value chain.

Agentforce for Energy & Utilities: AI-powered agents for customer service, sales assistance, energy advisory, field operations, and labor cost optimization.

Agentforce for Energy & Utilities delivers industry-specific AI agents with unmetered capacity for employee-facing use cases, including Customer Service agents that resolve billing inquiries and manage service agreements, Sales & Acquisition agents that handle upselling and cross-selling with invocable CPQ actions, Energy Advisory agents that provide personalized tariff recommendations and clean energy program guidance, and Field Service agents that automate pre-work briefs and post-work summaries.

These agents leverage conversational AI to handle complex energy industry queries while maintaining built-in compliance guardrails aligned with utility regulations. The agents integrate seamlessly with Energy & Utilities Cloud's comprehensive data foundation including customer 360, asset telemetry, and operational systems to provide contextual, accurate responses that deflect routine inquiries and enable employees to focus on strategic initiatives and complex problem-solving.

Energy Customer Service Console: Comprehensive 360-degree customer views with billing insights, service agreements management, and omnichannel engagement
The Energy & Utilities Service Console provides agents with unified access to customer information including billing history, consumption data, service agreements, and asset information to avoid application switching and improve resolution times.

Built-in AI actions enable automatic billing insights management, service agreement updates, and case summarization while integrating with external billing systems through real-time APIs. The platform supports omnichannel engagement across voice, digital channels, self-service portals, and mobile applications with consistent customer data and interaction history. Advanced features include proactive service capabilities, energy consumption insights, and integration with clean energy programs to provide comprehensive customer support that drives satisfaction and loyalty.

Intelligent Grid & Network Connections: End-to-end connection management from application through field orchestration with automated quoting and contracting.

The Grid & Network Connections solution streamlines the entire interconnection process from initial application through project completion with comprehensive application management, dynamic quoting using CPQ capabilities, and integrated field service orchestration for engineering assessments and construction work. Automated workflows handle eligibility assessment, feasibility studies, and regulatory compliance while customer and partner portals provide transparency and collaboration throughout the process. The system supports complex multi-site scenarios, distributed energy resource interconnections, and regulatory reporting requirements while reducing connection timeframes and improving customer experience through real-time status updates and proactive communications.

Field Service Plus for Energy & Utilities: Asset-centric field service with labor cost optimization, timesheet automation, and proactive maintenance capabilities.

Field Service Plus for Energy & Utilities combines Salesforce Field Service capabilities with industry-specific enhancements including labor cost optimization, automated timesheet tracking, asset service lifecycle management, and compliance with union regulations and safety requirements. The platform supports offline mobile functionality for field technicians, voice-activated timesheet entry, proactive maintenance scheduling based on asset health scores, and integration with drone technology for inspections and emergency response.

Advanced features include ESRI mapping integration, pre-built work plans for common utility tasks like meter installations, warranty management, and automated labor cost analysis to optimize workforce productivity and ensure regulatory compliance.

Revenue Cloud for Energy & Utilities: Configure, price, quote platform with tariff comparison, multi-site quoting, and energy-specific product catalog.

Revenue Cloud for Energy & Utilities provides comprehensive sales capabilities including configure-price-quote functionality adapted for energy products and services, automated tariff comparison tools, and multi-site quoting for commercial and industrial customers.

The platform includes pre-built energy reference products, contract lifecycle management, and order orchestration capabilities that support both B2B and B2C sales processes. AI-powered intelligent site grouping automatically organizes locations for complex quotes based on serviceability and eligibility, while the system handles usage-based pricing, promotional offers, and regulatory rate structures with automated approvals and compliance validation.

Clean Energy Programs Management: Program application management, contractor engagement, and compliance tracking for energy efficiency initiatives.

Comprehensive clean energy program platform that manages the entire lifecycle from customer applications through contractor execution and outcome tracking, with automated eligibility verification, budget management, and compliance reporting. The system supports various program types including energy efficiency rebates, demand response initiatives, and distributed energy resource programs with contractor portal capabilities for seamless collaboration.

Advanced features include AI-powered program recommendations, automated incentive calculations, outcome tracking with energy savings verification, and comprehensive reporting for regulatory compliance and program optimization.

Connected Assets & IoT Integration: Asset health monitoring, predictive maintenance, and real-time telemetry data processing with Data Cloud integration.

Connected Assets capabilities leverage IoT sensor data and telemetry to provide real-time asset health monitoring, predictive maintenance scheduling, and automated service appointment creation based on asset condition thresholds.

Data Cloud integration enables processing of high-volume asset data streams with pre-built data kits for energy consumption analysis, asset performance insights, and grid optimization analytics. The platform supports various asset types including transformers, meters, renewable energy systems, and EV chargers with automated event orchestration that triggers maintenance workflows, customer notifications, and regulatory reporting based on asset conditions and performance metrics.

Energy Advisory Services: AI-powered tariff recommendations, consumption insights, and personalized energy program suggestions.

Energy Advisory capabilities provide personalized recommendations to customers about optimal energy plans, usage optimization strategies, and available clean energy programs based on consumption patterns and preferences. AI agents analyze customer usage data, billing history, and program eligibility to deliver targeted recommendations through multiple channels including self-service portals, mobile apps, and agent-assisted interactions. The system supports automated tariff comparison, energy efficiency program enrollment, and personalized sustainability goals tracking while integrating with smart meter data and third-party energy management systems to provide comprehensive energy advisory services.

Data Cloud for Energy & Utilities: Pre-built data kits for consumption insights, asset monitoring, and unified customer-asset-work data models.

Data Cloud for Energy & Utilities provides industry-specific data models and pre-built data kits that unify customer information, asset telemetry, consumption data, and operational workflows in a zero-copy architecture for real-time analytics and AI applications. Key data kits include commodity usage insights for energy optimization, EV charger monitoring for performance and utilization analytics, and actionable telematics frameworks for real-time asset IoT data processing. The platform enables advanced segmentation, predictive analytics, and AI grounding while maintaining data governance and security requirements essential for utility operations and regulatory compliance.

Emergency & Outage Management: Incident detection, automated field dispatch, drone integration, and multi-channel customer communications.

Emergency management capabilities provide end-to-end incident response from automated detection through restoration with AI-powered incident creation, intelligent field resource dispatch, and integrated customer communications across multiple channels. The system supports drone integration for rapid assessment and remote monitoring, Slack integration for coordination between dispatchers and field teams, and automated customer notifications through Marketing Cloud and omnichannel routing. Advanced features include predictive outage modeling, crew optimization algorithms, and comprehensive audit trails for regulatory reporting while ensuring rapid response times and coordinated restoration efforts that minimize customer impact and maintain system reliability.

5. Service Description

5.1. Service Overview

Built on the world's #1 CRM platform, Education Cloud transforms how educational institutions connect with learners throughout their entire educational journey by providing a comprehensive, AI-powered platform for recruitment, admissions, student success, advancement, alumni, and academic operations. Built on Salesforce's trusted CRM platform, it enables colleges, universities, and educational organisations to move beyond fragmented systems to an integrated solution that supports the entire learner's lifecycle from prospective students through alumni and lifelong learners, enabling strategic decision-making through advanced analytics and AI-driven insights that accelerate institutional success and learner outcomes.

5.2. Service Features

1. **Agentforce for Education**: AI-powered agents for student recruitment, advising support, course search, and student goals management
2. **Student Information System (SIS) Capabilities:** Comprehensive course registration, holds & blocks management, and academic policy enforcement
3. **Intelligent Degree Planning**: AI-powered academic pathway guidance with custom rules and real-time eligibility checking
4. **Student Success Management:** Comprehensive care plans, advising support, and proactive student engagement with alerts and interventions
5. **Recruitment & Admissions:** Dynamic applications, campus finder, and automated prospect engagement with nurture campaigns
6. **Advancement & Alumni Relations**: Philanthropic research, gift planning, and comprehensive donor relationship management
7. **Academic Operations:** Course catalog management, registration windows, and learning program administration
8. **Data Cloud Integration**: Unified education data platform connecting SIS, LMS, and institutional systems for comprehensive analytics
9. **Shared Services**: including appointment scheduling, case management, and program management across the institution

5.3. Service Benefits

1. Increase student retention rates significantly
2. Accelerate enrollment and conversion processes
3. Improve staff productivity substantially
4. Enhance student satisfaction and engagement
5. Streamline compliance with reporting and accreditation standards (e.g. HESA)
6. Drive operational cost savings efficiently
7. Enable data-driven decision making consistently

8. Scale institutional impact institution-wide

5.4. Main components and functions of this service

Salesforce Education Cloud allows admissions officers, academic advisors, registrars, advancement professionals, and institutional leaders to deliver exceptional learner experiences while maintaining operational efficiency and regulatory compliance across the entire educational ecosystem.

Agentforce for Education: AI-powered agents for student recruitment, advising support, course search, and student goals management.
Agentforce for Education delivers industry-specific AI agents with unmetered capacity for employee-facing use cases such as Advising agents that support staff with student insights and campus resource guidance., and metered agents such as Student Recruitment agents that answer prospect questions 24/7 and guide application processes, Course Search agents that help students discover and register for courses, Student Goals agents that provide personalized career and life goal recommendations. These agents leverage conversational AI to handle complex educational queries while maintaining built-in compliance guardrails aligned with FERPA and other educational standards. The agents integrate seamlessly with Education Cloud's data model to provide contextual, accurate responses that deflect routine inquiries and enable staff to focus on high-value student interactions and strategic initiatives.

Student Information System (SIS) Capabilities: Comprehensive course registration, holds & blocks management, and academic policy enforcement.
The platform provides comprehensive SIS functionality including course registration with linked sections and prerequisites, rule-driven holds and blocks management, and registration windows that ensure equitable access to course enrollment. Advanced features include waitlist management, course versioning to maintain accurate academic records across different student cohorts, and academic structure modeling that supports stackable degrees and flexible learning pathways. The system enforces institutional policies through configurable business rules while providing real-time feedback to students and staff about eligibility, prerequisites, and academic progress, enabling institutions to modernize their academic operations with next-generation SIS capabilities.

Intelligent Degree Planning: AI-powered academic pathway guidance with custom rules and real-time eligibility checking.

AI-powered degree planning helps students map their academic journey from program requirements to term-by-term course selection, with intelligent pathway recommendations and what-if scenario analysis. The system supports custom degree planning rules that align with institutional policies, real-time eligibility validation, and collaborative planning between students and advisors. Advanced features include pathway templates for common degree tracks, prerequisite mapping, and integration with course offerings to ensure students can progress efficiently toward graduation while meeting all academic requirements.

Student Success Management: Comprehensive care plans, advising support, and proactive student engagement with alerts and interventions.
Comprehensive student success platform that provides 360-degree student views, proactive care plans, and alert systems that identify at-risk students before problems escalate. The platform supports milestone tracking, pulse checks for student wellbeing, and career readiness programs that prepare students for post-graduation success. Case management capabilities enable coordinated support across multiple departments, while program management tools help institutions deliver structured support services at scale. Advanced analytics identify patterns in student success and enable predictive interventions that improve retention and graduation outcomes.

Recruitment & Admissions: Dynamic applications, campus finder, and automated prospect engagement with nurture campaigns.
Comprehensive recruitment and admissions platform that transforms the prospective student experience through dynamic application management, intelligent campus and program finder capabilities, and automated nurture campaigns. The system supports multi-campus application preferences, application review automation, interview scheduling, and seamless integration with marketing campaigns to drive enrollment funnel optimization.

Advancement & Alumni Relations: Philanthropic research, gift planning, and comprehensive donor relationship management.
Education Cloud streamlines fundraising operations through AI-powered prospect research, comprehensive gift planning capabilities, and portfolio management for major gifts and planned giving vehicles. The platform supports complex gift calculations, donor stewardship workflows, and campaign management with integrated analytics that track fundraising performance and donor engagement.

Academic Operations: Course catalog management, registration windows, and learning program administration.

Comprehensive academic operations management including course catalog creation and maintenance, learning program design, and registration window configuration that supports institutional enrollment policies. The platform enables registrars to manage course versioning, academic calendars, and program requirements while providing students and advisors with accurate, real-time information about academic offerings. Advanced features include transfer credit management,, and academic policy enforcement through configurable business rules.

Data 360 Integration: Unified education data platform connecting SIS, LMS, and institutional systems for comprehensive analytics.

Deep integration with Salesforce Data 360 enables unified analytics across academic, financial, and engagement data, creating comprehensive insights that connect student performance with institutional outcomes. The platform includes pre-built connectors for major LMS platforms including Canvas, Blackboard, Moodle, and D2L, enabling seamless data flow between learning systems and student records. Zero-copy architecture provides real-time access to institutional systems without data duplication, while advanced segmentation capabilities support Marketing engagement campaigns and detailed analysis by academic program, student demographics, and engagement patterns.

Shared Services: including appointment scheduling, case management, and program management across the institution.

Institution-wide shared services that eliminate silos and enable consistent experiences across departments, including unified appointment scheduling for advising and support services, comprehensive case management and support programs for student issues. The platform provides timeline views of student interactions, engagement tracking across multiple touchpoints, and document management capabilities that maintain audit trails for accreditation and compliance purposes. Advanced features include identity verification, actionable relationship mapping for complex family and organizational structures, and flexible portal capabilities that support multiple constituent types from a single platform.

6. Net Zero Cloud - Service Description

6.1. Service Overview

Built on the world's #1 CRM platform Net Zero Cloud transforms how organizations manage their sustainability journey by providing a comprehensive, AI-powered platform for environmental, social, and governance (ESG) data management and reporting. Built on Salesforce's trusted CRM platform, it enables enterprises to move beyond manual spreadsheet-based sustainability tracking to an integrated system that connects ESG data with business operations and stakeholder engagement. The platform unifies emissions data across Scopes 1, 2, and 3, while automating compliance reporting and enabling strategic decision-making through advanced analytics and AI-driven insights that accelerate the path to net-zero goals.

6.2. Service Features

1. **Agentforce for Net Zero Cloud**: AI-powered agents for ESG reporting, data insights, and automated data collection.
2. **Environmental Accounting Platform**: Comprehensive tracking of Scopes 1, 2, and 3 emissions plus waste and water management
3. **Intelligent Document Processing**: Automated data extraction from utility bills and sustainability documents using AI
4. **Disclosure & Compliance Hub**: Framework-specific report builders for CSRD, SASB, CDP, GRI, and custom reporting standards
5. **Scope 3 Hub & Supplier Engagement:** Advanced supplier collaboration tools with sustainability scorecards and data collection
6. **Real-time Analytics & Forecasting**: Predictive modeling, what-if analysis, and emissions forecasting with Einstein AI
7. **Multi-Organization Support**: Complex organizational hierarchy management for subsidiaries and joint ventures
8. **Program & Outcome Management:** Goal setting, target tracking, and decarbonization program management with MACC curves
9. **Net Zero Marketplace**: Access to emissions factors datasets, carbon credits, and third-party sustainability data
10. **Offset & Renewable Energy Management:** Track renewable energy credits (RECs), carbon offsets, and renewable energy procurement with automated retirement tracking and verification

6.3. Service Benefits

1. Reduce manual reporting time significantly
2. Accelerate compliance with evolving regulations
3. Improve data accuracy and auditability
4. Drive operational cost savings through optimization
5. Enhance stakeholder trust and transparency
6. Enable strategic decarbonization decision-making
7. Streamline supplier engagement at scale
8. Future-proof sustainability management capabilities

6.4. Main components and functions of this service

Salesforce Net Zero Cloud allows sustainability managers, ESG directors, compliance officers, and executive teams to transform their approach to environmental and social impact management while maintaining operational efficiency and regulatory compliance across their entire value chain.

Agentforce for Net Zero Cloud: AI-powered agents for ESG reporting, data insights, and automated data collection.

Agentforce for Net Zero Cloud delivers ESG Reporting agents that automate framework-specific disclosure responses and ESG Insights agents that provide real-time sustainability analytics. These agents leverage conversational AI to answer complex sustainability queries while maintaining built-in compliance guardrails aligned with global ESG standards. The agents integrate seamlessly with Data Cloud to search through sustainability documentation and generate accurate, contextual responses for regulatory reporting, significantly reducing the manual effort required for disclosure preparation and enabling sustainability teams to focus on strategic initiatives rather than administrative tasks.

Environmental Accounting Platform: Comprehensive tracking of Scopes 1, 2, and 3 emissions plus waste and water management.

The platform provides end-to-end carbon accounting capabilities covering all emission scopes with automated calculations using the latest emissions factors and methodologies aligned with the GHG Protocol. Advanced features include location-based and market-based Scope 2 calculations, comprehensive Scope 3 coverage across all 15 categories with both spend-based and activity-based methodologies, and integrated waste and water tracking modules. The system supports complex calculation scenarios including renewable energy attribution, carbon credit management, and custom fuel types for specialized assets like private jets, while maintaining full audit trails and data lineage required for third-party verification and regulatory compliance.

Intelligent Document Processing: Automated data extraction from utility bills and sustainability documents using AI.

AI-powered document processing capabilities automatically extract key data points from utility bills, invoices, and sustainability reports using advanced OCR and machine learning algorithms. The system can process documents in multiple formats (PDF, images, CSV) and automatically categorize them by utility type, location, and time period while validating data for accuracy and completeness. Integration with MuleSoft enables seamless document workflow automation where incoming documents trigger automatic data extraction, validation, and entry into Net Zero Cloud with human oversight only required for exceptions or quality control, dramatically reducing manual data entry efforts and improving data accuracy.

Disclosure & Compliance Hub: Framework-specific report builders for CSRD, SASB, CDP, GRI, and custom reporting standards.

The Disclosure & Compliance Hub provides pre-built report templates for major ESG frameworks including CSRD, SASB, CDP, GRI, and emerging standards like ISSB, with automated quantitative data population from Net Zero Cloud and AI-powered qualitative response generation. The Information Library enables reusable content management across multiple frameworks, while the Microsoft Office integration allows collaborative editing and version control for disclosure documents. Agentforce integration provides intelligent first-draft generation for complex disclosure questions by analyzing existing company policies, previous reports, and sustainability data, with accuracy scoring to indicate completeness and areas requiring human review.

Scope 3 Hub & Supplier Engagement: Advanced supplier collaboration tools with sustainability scorecards and data collection.

Comprehensive Scope 3 management includes automated spend-based calculations, supplier engagement portals for primary data collection, and integration with third-party sustainability and supplier due diligence platforms through solutions available on the Salesforce AppExchange. The platform supports the complete Scope 3 journey from initial spend-based estimates to granular supplier-specific data through configurable supplier scorecards, automated outreach campaigns, and progress tracking on supplier engagement initiatives. Advanced features include hybrid calculation methodologies that combine spend-based estimates with actual supplier data, materiality assessments to prioritize engagement efforts, and supplier performance dashboards that track both emissions reductions and engagement compliance across the value chain.

Real-time Analytics & Forecasting: Predictive modeling, what-if analysis, and emissions forecasting with Einstein AI.

Advanced analytics capabilities include emissions forecasting based on historical trends and business growth projections, what-if scenario analysis for evaluating decarbonization strategies, and marginal abatement cost curve (MACC) analysis to prioritize reduction initiatives by cost-effectiveness. Einstein AI provides intelligent anomaly detection to identify data quality issues, predictive insights for emissions hotspots, and recommendation engines for optimization opportunities. The platform enables dynamic goal setting with Science-Based Targets initiative (SBTi) alignment and real-time progress tracking against interim and long-term targets with automated alerts for trajectory deviations.

Multi-Organization Support: Complex organizational hierarchy management for subsidiaries and joint ventures.

The platform handles complex organizational structures including parent-subsidiary relationships, joint ventures with less than 50% ownership, and multi-entity reporting scenarios with flexible data aggregation and allocation rules. Features include organizational boundary management aligned with GHG Protocol requirements, automated rollup calculations across entities, and configurable reporting hierarchies that support both operational control and financial control approaches. The system maintains separate data governance and access controls for each entity while enabling consolidated reporting and benchmarking across the organizational portfolio.

Program & Outcome Management: Goal setting, target tracking, and decarbonization program management with MACC curves.

Structured program management capabilities enable systematic tracking of decarbonization initiatives from planning through implementation and measurement of outcomes. The platform supports various program types including energy efficiency projects, renewable energy procurements, and operational improvements with automated ROI calculations and progress monitoring. MACC curve analysis helps prioritize initiatives based on cost per ton of CO_2 avoided, while integrated action planning ensures accountability and progress tracking. Program templates for common initiative types accelerate deployment while customizable workflows accommodate unique organizational processes.

Net Zero Marketplace: Access to emissions factors datasets, carbon credits, and third-party sustainability data.

The integrated marketplace provides access to regularly updated emissions factors from sources like DEFRA, EPA, and industry-specific databases, with automatic matching to activity data for consistent and accurate calculations. Carbon credit management capabilities include registry integration for tracking purchases, retirements, and vintage information with full chain of custody documentation. Third-party data integration enables access to supplier sustainability data from third party platforms, while automated data quality scoring helps assess the reliability of different data sources for materiality and reporting purposes.

Offset & Renewable Energy Management: Track renewable energy credits (RECs), carbon offsets, and renewable energy procurement with automated retirement tracking and verification.

Centralize the tracking of environmental offsets and clean energy procurement within a unified system of record. Link Carbon Credits to verified projects and retire them against validated emissions inventories to neutralize residual Scope 1, 2, and 3 impacts with full lineage. Assign Energy Attribute Certificates to specific stationary assets to lower market-based Scope 2 emissions while maintaining real-time visibility into certificate lifecycles and remaining balances. These tools automate credit allocation and status updates to ensure transparent alignment between sustainability investments and net-zero targets.

7. 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. Data Privacy Framework (DPF) with respect to personal data submitted by Salesforce's customers in reliance on the DPF to the following online services: Sales Cloud, Service Cloud, Force.com, Communities, Chatter, Site.com, Database.com, Analytics Cloud, Financial Services Cloud, Health Cloud, Heroku, Pardot and Configure, Price, Quote (CPQ) https://www.salesforce.com/assets/pdf/misc/privacy-shield-notice.pdf

In addition, we currently hold the following certifications:

Geographical Recognition

- TRUSTe Certified Privacy Seal
- Japan Privacy Seal from the Japan Information Processing Development Corporation
- (JIPDC)
- TUV Certificate
- FedRAMP
- Cyber Essentials
- Privacy Shield
- HITRUST
- HIPAA

Global Audit Compliance

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

Learn more here: Salesforce Services Trust and Compliance Documentation

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

8. Data Backup / Restore and Disaster Recovery

Redundancy and Scalability

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

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

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

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

Disaster Recovery

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

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

Backup

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

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

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

- Data Export Service: Manual or scheduled exports of your data via the UI. Export Backup Data from Salesforce: https://help.salesforce.com/s/articleView?id=xcloud.admin_exportdata.htm&type=5..
- 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.

9. On-Boarding

Describe how easy and simple it is for a customer to On-Board to our service

9.1. 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.

9.2. Configuration and Customisation

The service provides many configuration options, including integration with custom applications. Details can be found www.salesforce.com/healthcloud

10. Off-Boarding

Off-boarding from the service is as simple as exporting and downloading your 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.

10.1. 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.

10.2. 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.

11. 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.

12. 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.

13. Service Management

Your success is our success

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

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

Standard Success

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

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

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

Premier Success

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

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

Benefits include:

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

Specialised Guidance

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

Expert Assistance

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

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

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

Specialised Guidance

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

Signature Success

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

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

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

Technical Account Manager (TAM)

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

Proactive services

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

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

Accelerators

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

Learn more: https://www.salesforce.com/services/success-plans/overview/
There is no financial recompense model for not meeting service levels.

14. Customer Responsibilities

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

15. Client-side Technical Requirements

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

Browser requirements
Salesforce supports a range of popular browsers. Learn more: Supported browsers

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

While average page size is on the order of 90KB, Salesforce supports compression as defined in the HTTP 1.1 standard to compress the HTML content before it is transmitted as data across the Internet to a user's computer. The compression often reduces the amount of transmitted data to as little as 10KB per page viewed, due to the lack of image content. The site was designed with minimum bandwidth requirements in mind, hence the extensive use of colour coding instead of images. Our average user also is known to view roughly 120 pages from our site per day. However, it is best to measure any page that has been customised, especially if Visual Force components have been added to the page, to get an accurate measurement of the page size.

Our application is stateless; therefore, there are no communication requirements in the background once the page loads like traditional client server applications e.g. Outlook. Therefore, once the page loads there are no additional bandwidth requirements until a user queries or writes information to Salesforce. Further information here https://help.salesforce.com/articleView?id=000004958&type=1

16. 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

17. Training

We provide webinar-based and instructor led training for the majority of our services. Details can be found in our separate listing for Salesforce Training also listed on the Digital Marketplace.
Further information can also be found here:
https://www.salesforce.com/services-training/training_certification/training-by-cloud.jsp

18. 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/

19. Performance

Full details are contained in our terms.

19.1. 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.

19.2. 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

19.3. Incident Updates

Incident update intervals vary based on the level of support selected, ranging from every 30 minutes to longer periods. Details can be found in section 8

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