XMA Limited

Salesforce Agentforce Revenue Management (formerly Salesforce Revenue Cloud)

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

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1. Service Description

1.1. Service Overview

Salesforce Revenue Cloud [Former name] is now Salesforce Agentforce Revenue Management. You may continue to see the former name in our application and documentation. It helps businesses accelerate profitable growth by unifying product-to-cash on the world's #1 AI CRM. Unify sales and finance teams on a single platform, streamlining the revenue lifecycle to improve seller efficiency, customer relationships and revenue outcomes, all while keeping costs low.

With Salesforce Agentforce Revenue Management, businesses can:

- Manage any revenue stream, including one-time, milestone, usage, subscription and more, all on a single platform. Generate quotes, invoices and billing schedules for any revenue type. Easily launch new revenue streams as you grow your business with intuitive product and pricing configuration.

- Improve sales effectiveness with better controls and automation. Salesforce Agentforce Revenue Management makes it easy for reps to configure quotes with the right products and configuration based on customer needs, and work with customers to reach terms that work for them and for your business.

- Reduce redundancies and operating costs by consolidating revenue technology on a single platform. No more swivel chairing across different systems to get the information you need. Pricing controls and approvals enable you to protect your margins against unnecessary discounts.

- Offer customers a more streamlined buying experience, enabling them to choose how they buy and how they pay. Accuracy across the entire revenue lifecycle builds customer trust, and automated renewals help to reduce churn.

1.2. Service Features

Service Features Overview

Agentforce Revenue Management

Agentforce Revenue Management includes:

- Revenue Cloud Growth and Advanced Editions
- Revenue Cloud Billing
- Salesforce CPQ
- Salesforce Billing

Revenue Cloud Growth Edition

Revenue Cloud Growth Edition provides access to the following features:

<u>Product Catalog Management</u>

Product Catalog Management enables administrators and designers to create robust catalogs for any business. Accelerate your sales with personalized, browsable product offerings. Simplify complex catalog management, and ensure relevant products reach customers across all channels, from brick-and-mortar stores to ecommerce platforms and beyond.

Salesforce Pricing

Salesforce Pricing provides a unified platform for consistent, compliant, and accurate pricing for your products. Businesses can define standard prices for their products and apply discounts through price adjustments for a range of scenarios including volume discounts, subscription pricing, bundle pricing, and more.

Sales reps benefit from real-time access to precise pricing and the ability to directly apply relevant discounts, giving them clear visibility into the final price. This is especially valuable for negotiating large quotes and winning complex deals. Sales reps also get the information they need to explain quotes to customers through a detailed price adjustment log (the price waterfall), enhancing transparency and trust.

Salesforce Pricing also offers prebuilt integrations with other Revenue Cloud components like Transaction Management, and allows for custom pricing actions and third-party API integrations.

Product Configurator

Use the Product Configurator tool to customize the components and attributes of a product so that the final configured product meets the business requirement expectations. Product configuration entails customizing a product to align with the specific requirements of a customer.

By using the Product Configurator, present complex product offerings to customers efficiently. The Product Configurator tool provides users with an optimized and intuitive interface making it simple and easy to select the most suitable combination of features for a complex product. The Product Configurator not only facilitates the configuration of product bundles, but it also facilitates the customization of individual product attributes.

With Product Configurator, your sales representatives can validate product selections instantly and get immediate cost insights with real-time pricing updates. The Product Configurator proves to be a valuable asset for businesses that offer complex products. It contributes to saving time and resources, enhancing accuracy, and elevating the customer experience.

Transaction Management

Transaction Management is a core component of Salesforce Revenue Cloud that streamlines and automates the entire sales process, from quoting to order capture. Empower sales reps to efficiently create and manage all types of sales—including initial, renewal, and amendment—while simplifying the subscription lifecycle. By integrating with tools for product configuration, pricing, and fulfillment, Transaction Management ensures accuracy and reduces manual effort. This results in a more efficient sales cycle, improved pricing accuracy, and an enhanced customer experience.

From a business perspective, the key benefit is the optimization of revenue operations. By automating the end-to-end quote-to-cash process, Transaction Management helps ensure revenue compliance and maximizes the potential of every deal. This creates a single, reliable source of truth for all sales transactions, giving businesses greater insight and control over their revenue streams.

Advanced Approvals

Advanced Approvals in Revenue Cloud provides a streamlined platform to ensure complex business processes are consistent, compliant, and adhere to business policies. Businesses can design intricate, tailored approval workflows to automate processes across the entire quote-to-cash lifecycle. This allows organizations to define and run complex sequential or parallel approval chains, ensuring that all necessary authorizations are gathered.

Sales managers and approvers benefit from a centralized Approvals app, allowing them to administer and respond to requests in a timely and effective manner. This gives sales teams clear visibility into authorization status through detailed audit trails and notifications, enhancing transparency and ensuring transactions can be closed efficiently.

This functionality is driven by Flow Orchestration, which manages multi-team workflows that may require specific steps or pauses for user input. As a result, the limitations and best practices for Flow Orchestrations also apply to Advanced Approvals.

Usage Selling

Sell products that are priced based on consumption so customers can buy the right amount for their needs. Rating definitions provide clear rate cards, rating procedures, and policies for transparent pricing and upfront visibility of rating details while browsing or quoting a product. The Flexible Rating Engine computes rates for overage consumption, ensuring accurate billing.

Rate Management

Use Rate Management to easily define the rates for usage resources granted with the sellable product. Set up rates based on consumption of a usage resource. Define rate adjustments based on the consumption quantity of a usage resource. Use rating procedures to create precise formulas for calculating the final net rate and use the rating waterfall view to understand the rate breakup steps of the rating calculation process.

Document Builder

Document Builder is a no-code, visual tool designed for simple and reusable document creation. It works within the Salesforce UI and is ideal for creating consistent, branded documents directly from UI or Apex. Its template creation utilizes a Lightning App Builder framework, offering an easy-to-use, WYSIWYG (What You See Is What You Get) builder. Document Builder uses a point-and-click design experience and supports Salesforce objects like Quotes in Revenue Cloud and Service Reports or Work Orders in Field Service.

Use document builder when you need to:

- Auto-generate quote PDFs or order forms
- Preview and attach documents to records

- Generate documents on mobile or in offline environments, such as those used in Field Service scenarios.
- Provides offline mobile app access and signature capabilities for field agents in Field Service scenarios.

Context Service

Using Context Service, your business users can enhance application performance by optimizing data access and eliminating redundant input. When an application sends a data request, the context fetches and loads all necessary data from the database onto itself. It then distributes the required data to specific processes to fulfill the application's request.

Business Rules Engine

Simplify determining eligibility or qualification and automate complex decision-making to find solutions faster using Business Rules Engine. Use a Business Rules Engine component or a combination of components to design business rules to provide automated business solutions in a workflow created using any tool. Business Rules Engine is a suite of services, components, and objects that can be used to create business rules that perform complex lookups and calculations.

Business Rules Engine components are available as part of Flows and Omnistudio. Also, you can use Connect APIs to integrate Business Rules Engine with any workflow created using custom or third-party tools. The workflow that you use to gather inputs passes the inputs to Business Rules Engine, which then returns the outcome to the workflow that called the Business Rules Engine component.

Omnistudio

Omnistudio provides a suite of services, components, and data model objects that combine to create Industry Cloud applications. Create guided interactions using data from your Salesforce org and external sources. With OmniStudio, you can:

- Contain the user-interaction logic with Omniscripts.
- Transfer and transform data between Salesforce and the Omniscripts, Flexcards, and Integration Procedures tools with Omnistudio Data Mappers.
- Bundle server-side data integration operations for efficiency and reuse with Integration Procedures.
- Display data and launch actions with Flexcards.

Revenue Cloud Advanced Edition

In addition to the features included in Revenue Cloud Growth Edition, the Revenue Cloud Advanced includes:

Salesforce Contracts

Salesforce Contracts allows customers to manage the end-to-end lifecycle of contracts. Control the sales process integration, contract management process, and contract lifecycle that starts from contract authoring to activation.

Dynamic Revenue Orchestrator

Dynamic Revenue Orchestrator (DRO) empowers businesses to fulfill customer orders with exceptional flexibility and efficiency. By breaking down a single commercial order into multiple, manageable fulfillment steps, DRO allows businesses to execute tailored fulfillment plans for each product or service. This ensures that your company can deliver its commitments faster more accurately, and at any scale.

Dynamic Revenue Orchestrator includes two essential components: Decomposition and Fulfillment.

- Decomposition - The process of breaking down a customer's commercial order into the individual technical products, services, and tasks that are needed to fulfill it. This process bridges the gap between how a product is sold by sales reps and how it is actually delivered and managed by your order fulfillment team.
- Fulfillment - After order items are decomposed into fulfillment line items, an orchestration fulfillment plan tracks the stages and tasks required to fulfill the order to completion. A fulfillment plan can contain prioritization rules, SLAs, external callouts, automated tasks, manual tasks, and order fallout contingencies.

Salesforce Document Generation

Salesforce Document Generation is offered in both Revenue Cloud and Industry Clouds. Both use Microsoft Word templates and offer more advanced functionality than Document Builder. DocGen is designed for comprehensive and complex document workflows, particularly where redlining quotes, contracts, or other documents is required. DocGen's template design leverages a Word-based editor, allowing for the creation of complex templates with support for data tokens, conditional logic, and tabulation.

Use document generation when you need to:

- Generate documents such as contracts, quotes, order forms, proposals, reports with dynamic layouts
- Insert conditional sections or complex logic into your documents
- Merge data from multiple standard or custom objects
- Use Word formatting or scripting to control layout and tokens
- Salesforce Document Generation is designed for teams that require control over formatting and document workflows, such as Legal, Sales Ops, or Revenue teams.

Revenue Cloud Billing

Monetise all the sales models of your business with Billing. Generate invoices for diverse scenarios, such as customer milestones, product usage, amendments, cancellations, or early renewal of evergreen subscriptions. Bill in advance or in arrears, or bill for external transactions. Consolidate invoices with custom grouping, and suspend and resume billing for specific accounts or billing schedule groups as needed. Automate and scale invoice generation. Preview upcoming invoices, and create PDFs for invoice previews and actual invoices by using customized templates. Adjust billing parameters to suit your business requirements. Configure multiple legal entities and tax engines to best support your business operations and structure. Cater to your customer requirements by configuring billing profiles. Automate the conversion of negative invoice lines to credit memos and the application of credits to invoices. Process payments for your invoices and issue refunds if required. Track payments for unpaid invoices and collect payment promises from customers. Write off unpaid or partially paid invoices if the balance on the invoice is deemed uncollectible. Get real-time visibility into invoices, credit memos, and billing schedules. Keep business records accurate and improve financial reporting by using accounting periods and a chart of accounts for legal entities, automating journal entries, and managing multi-currency transactions.

Salesforce CPQ

With Salesforce CPQ (Configure, Price, Quote), you can create volume discount schedules with unlimited tiers - the discount level automatically adjusts as the product quantity is changed. Multiple quote line items can be edited on a single screen. And every sales quote that your team generates is logged, keeping track of exactly what was sent out and when, leaving a helpful audit trail.

With built-in reports and dashboards, sales reps and managers stay up to date with quotes that have been generated, as well as those that require follow-up and have expired, improving productivity and increasing close rates.

Some of the features of Salesforce CPQ include:
- Intuitive product search capabilities
- Ability to edit multiple product line items on a single screen
- Easily handle discount tiers, volume discounts, percent-of-total subscriptions, et al.
- Intelligent approval process

Advanced pricing features including:
- Volume discounts
- Percent-of-total subscriptions
- Pre-negotiated contract pricing
- Channel and partner pricing

CPQ: Orders & Renewals
CPQ eliminates the need to manually manage the renewal process by automatically generating renewal quotes, saving time and ensuring more accurate, complete renewals.

CPQ generates an accurate picture of the total contract value of each account based on their closed original quote and add-on quotes. When renewal time comes along, a renewal opportunity and quote are automatically generated based on the previously closed and validated quotes. All of this information is available and reportable in Salesforce, eliminating the need to set up renewal reminders outside of the system and reducing the risk of missing a renewal.

Easily convert quotes to clean orders that can be automatically loaded into your business system.
- Generate clean orders for closed/won deals
- Split and manage orders as required with back-end integration
- Automate add-on orders with co-terming and contract terms
- Generate renewal quotes while applying price increases
- Create automatic renewal reminders in Salesforce

CPQ: Product Configurator

With the use of configuration attributes, product bundles, and configuration rules, you can help your users choose the correct packages by allowing or restricting certain selections. Used together, these features can guide sales reps to customise a product bundle by selecting appropriate components to be included, like licences, support, training, or services.

In addition to bundles, the Product Configurator supports dependencies and exclusions, and identifies cross-sell and upgrade opportunities. CPQ ensures that all of your company's quotes are accurate and complete, making data entry errors a thing of the past.

Configure products and services based on your business rules and logic.
- Configure products, solutions & bundles
- Use standard Salesforce product catalogues
- Eliminate invalid or incorrect product options or bundles
- Update configurations at any time for special promotions or product changes

CPQ: Guided Selling
The Guided Selling feature allows you to set up a simplified selling process for your sales reps, which is a huge win for high-growth companies. With Salesforce CPQ you can set up multiple selling scenarios based on your complex business logic that simplifies the product selection process and minimise the time it takes to create a quote. You can create a set of questions that prompt your sales reps to begin entering simple customer data, like company size or industry. Based on their responses, CPQ guides them to the most appropriate product and package selections. Guided Selling processes can also be configured so that different prompts are displayed for every single line item on a quote.

Help your staff select the right products and services for each customer every time.

- Reps select the correct solutions by answering questions about customer needs
- Help new reps become productive quickly
- Identify cross-sell and upsell opportunities

CPQ: Proposal Generator
CPQ automatically generates branded proposals and contracts at the click of a button. The proposal templates are fully customisable, ensuring that generated proposals meet your company's branding standards. In addition, proposals and contracts can be generated in PDF or Microsoft Word, and can even include electronic signatures, with your choice of e-signature applications.

Create professional-looking branded proposals with a click or a tap.
- Fully customisable templates so your documents look the way you want
- Include the right collateral to accompany each proposal
- Integrate with eSignature
- Documents are automatically saved in Salesforce for easy tracking, auditing, and compliance

CPQ: Manage Contracts
Create and manage professional sales contracts:
- Deliver executable contracts with a click or a tap
- Integrate with eSignature
- Fully customisable templates
- Dynamic Terms and Conditions
- Manage non-standard requests with approval workflows

- Analytics provide visibility into risk levels and pipeline
- Contract repository in Salesforce provides easy tracking, auditing, and compliance

CPQ: CPQ for Communities

Salesforce CPQ for Partner Community and Customer Community are online selling platforms that connect your resellers, distributors, and customers to your own sales processes and resources.

Your sales partners can:
- Register new leads, find product information, and self-service price quotes and orders
- Access your product and pricing information and transact from anywhere
- Increase sales with a rich, branded and device responsive mobile experience
- Automatically update pipeline and forecasts right in Salesforce

Your customers can self-serve with product bundles, select add-ons, and more ensuring channel sales operates at a faster pace.

Salesforce Billing

With Salesforce Billing, you can seamlessly integrate your invoicing, collections, taxes, and reporting into one platform, all within Salesforce. In addition, you can manage revenue and billing for subscriptions, one-time billing, and usage-based billing scenarios.

Billing: Invoice
Automate the invoicing process for all of your clients.
- Create and send invoices on the go, from any device
- Generate invoices in bulk for orders and subscriptions
- Configure and schedule multiple billing cycles
- Automatically reconcile invoices and get notified of failed or missing ones
- Easily integrate invoicing with your accounting system

Billing: Subscription Billing
Manage services that are billed on a recurring basis
- Create and manage subscriptions with flexible terms
- Easily configure trial periods and setup charges
- Manage "Freemiums" and evergreen (non-expiring) subscriptions
- Set up subscriptions to auto-renew, saving you time
- Quickly upgrade, downgrade and pro-rate subscriptions.

Billing: Payments
Manage and collect payments without processing complications.
- Collect payments against your invoices
- Handle partial payments or allocate a single payment against multiple invoices
- Store credit card details for your customers, and notify them before card expiration
- Manage the dunning process to follow-up on failed payments
- Re-allocate and refund payments and handle payment disputes

Billing: Manage Sales Tax and VAT
Easily manage taxes and run reports to feed them to your accounting system.
- Sell and bill in multiple currencies

- Manage all of your VAT, Sales Tax, Use Tax, GST/PST/HST calculations
- Configure tax rates by product category (wholesale, resale) or customer category (country, state, city, post code)
- Manage compounded tax calculations and configure tax exemptions
- Export product tax values to your accounting system

Billing: Revenue Recognition
Quickly recognise revenue and report on quotes, orders, invoices, and payments

- Create completely customisable reports and dashboards
- Easily identify top-spending customers, most profitable customers, and most successful pricing models
- Forecast sales and project cash flow to assist in budgeting
- Report on the profitability of your team and tie incentives to the actual revenue they generate

1.3. Service Benefits

- Ensure the right components are included in every quote
- Quickly create accurate, customer-friendly quotes with consistent pricing and discounting
- Accurate picture of your current recurring revenue stream
- More accurate forecasts
- Improved customer loyalty
- Increased employee productivity
- No more missed renewals
- Reduced data entry errors
- Increase cross-sell and upgrade opportunities
- Leverages standard salesforce product catalogue and price books, reducing implementation time and maintenance overhead
- Spend less time searching through and modelling complex pricing and product scenarios.
- Signed documents automatically saved and logged for easy auditing and compliance
- Make it easy for your partners to sell your products and services
- Enable automatic billing calculation and pro-rating so that you don't have to
- Enable your organisation to offer flexible billing terms and billing cycles for each client without the administrative overhead.
- Improve revenue speed, accuracy, capacity and cash flow

Salesforce CPQ and Salesforce Billing are built and delivered directly on the Salesforce Platform and Salesforce Mobile App, making selling even easier.
100% Native means it looks and acts like Salesforce for fast adoption. No special skills required – a Salesforce Admin can manage the app. Exceptional reliability, scalability and security – same as Salesforce. Accelerate sales with one click quote creation from your phone or tablet.

2. Information Assurance

There are several integrity checks performed on the system:

- Input validation on standard fields,
- Backups are tested for integrity,
- Disaster recovery tests with customer involvement, and

- Oracle database functionality has built-in integrity checks.

Note: We do not "see" what type of data is put into the service, so minimal integrity checks are done at the data element level.

At the application level, you can also enforce information assurance through standard fields such as currency only, email, et al. These fields enforce the form of the data, so users are guided to proper input.

Salesforce holds the following certifications:

- TRUSTe Certified Privacy Seal
- UK NHS DSPT
- Japan PrivacyMark Seal from the Japan Information Processing Development Corporation

- Asip Sante HDS
- NEN-7510-1:2017
- C5 (ISAE3000)
- Spain ENS
- IRAP
- ISMAP
- ASP/SaaS
- CS Gold Mark
- FedRAMP High
- HIPAA
- HITRUST CSF
- Privacy Shield

Global Audit Compliance
- ISO 27001, 27017,27018, 9001, 42001
- SSAE 18/ISAE 3402
- SOC-1
- SOC-2
- SOC-3 (SysTrust)
- PCI-DSS
- Cyber Essentials
- WCAG 2.2 AA

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 utilising the Salesforce Webchat capability in live services.
- Support and Documentation Accessibility
  - User Support: We are committed to ensuring our user support channels (Email, Ticketing, and Webchat) are accessible for users working with assistive technology. We strive to ensure our support staff work with services that strive to meet WCAG 2.2 Level AA to ensure an effective support experience.
  - Documentation: All official documentation, including resources for onboarding and offboarding, strives to meet WCAG 2.2 Level AA to the extent possible.
- Maintenance and Review Methodology
  - Review Cycle: We maintain a formal process for reviewing our adherence to WCAG 2.2 AA standards across all products.
  - Continuous Improvement: We are committed to moving our accessibility review cycle from an annual basis to a six-month (semi-annual) schedule. This ensures that any bugs or regressions are identified and remediated promptly in alignment with every release.
  - Consistency: Our enterprise adheres strictly to WCAG 2.2 Level AA as the consistent standard for all accessibility compliance initiatives.

3. Data Backup / Restore and Disaster Recovery

Redundancy and Scalability

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

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

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

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

Disaster Recovery

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

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

Backup

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

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

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

- Data Export Service: Manual or scheduled exports of your data via the UI. Export Backup Data from Salesforce: https://help.salesforce.com/s/articleView?id=xcloud.admin_exportdata.htm&type=5
- 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 & Restore provides additional backup and restore capabilities. You can configure and maintain automatic backups, make a backup on demand, and quickly find and restore data. You can control the order in which data is restored to preserve relationships and connections to related records.

4. On-Boarding

4.1. Deployment

Some customers opt to self-deploy. We offer a self-deployment package and documentation to support this path. Alternatively, a certified partner may be engaged to work with customers on configuration and deployment. During the sales cycle, we work with customers to identify the best path to success based on their needs.

4.2. Configuration and Customisation

Unlike traditional software, we offer a highly intuitive declarative framework that allows configuration / customisation at the point and click, drag and drop level. Custom data modelling, objects, fields, workflow, all the way up to entirely new apps can be set up without code or IT support.

We also offer traditional tools for development, including Visualforce (similar to HTML) and Apex (Java syntax).

Documentation is provided on our Customer Success and Developer Success Community sites to support both efforts.

5. Off-Boarding

5.1. Termination

Upon contract termination with Salesforce, the customer's data on disk is flagged within the database and set to inactive status or what can be referred to as a "soft delete." This data is no longer available or accessible to the application but is backed up in the full database backup process. The data remains in this state for 180 days; this is done in the event that the customer decides to resume services or needs the data for a legal reason. At 180 days, the data is marked for deletion ("hard delete") and will be deleted after 30 more days. Once this "hard delete" is executed the customer data is physically deleted and unrecoverable from the database. Following the purge, the data will remain on backup for an additional 90 days prior to being unrecoverable from backup media and deleted/overwritten.

Customer Data Deletion Timeline

- Day 0: Data on disk is flagged for deletion.
- Day 1-179: Soft deleted. Data is no longer accessible to the application, but is backed up in the full database backup process.
- Day 180: Data on disk is marked for hard delete.
- Day 210: Hard deleted. Data is physically deleted and unrecoverable from the database. Backup remains for 90 days.
- Day 301: Backup data is unrecoverable from backup media.

5.2. Data Extraction and removal

Salesforce QtC data and history will be available for export via standard Salesforce based tools like the APEX data loader and other data loader tools. Upon contract termination, you can also request an extract of all your data at your discretion.

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

It is important to note that Agentforce Revenue Management requires a Salesforce Sales Cloud licence at minimum. The solution can also be used in conjunction with Salesforce Service Cloud and Community Cloud.

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.

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.

9. 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.

10. Client-side Technical Requirements

Customers wishing to deploy Agentforce Revenue Management must already have purchased and activated Salesforce Sales Cloud. This is due to the fact that this is part of an organisation's sales process and makes use of the common data model with Salesforce Sales Cloud. Agentforce Revenue Management can also be deployed to organisations that have purchased and activated Salesforce Service Cloud.

Agentforce Revenue Management works with editions of Salesforce commonly deployed among our customer base - Enterprise (EE) and Unlimited (UE).

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 Visualforce 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.

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

There are 3 types of admin training available to customers: Onsite (at a Salesforce location), Virtual (webinar with a live instructor), and Self-Led (pre-recorded, online tutorials). Training information can be found here: https://trailheadacademy.salesforce.com/

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

To maximise availability, the service is delivered using multiple world-class data centres supporting primary and replicated disaster recovery instances, plus a separate production-class lab facility. The infrastructure utilises carrier-class components designed to support millions of users. 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 equipment for a given function.

Performance is proven through our public Trust site. We see more than 5B transactions a day on average, all at sub-second speeds. Please see the following URL for more information, https://status.salesforce.com/performance

14.1. Service Levels

The Salesforce Services is designed with the concept of continuous improvement and Trust (e.g. Availability, Performance and Security) in the infrastructure. Salesforce uses commercially reasonable efforts to make its on-demand services available to its customers 24/7, except for planned downtime, for which Salesforce gives customers prior notice, and force majeure events. Excellent availability statistics are critical to Salesforce's customers' success and to the success of Salesforce as a company. Salesforce generally does not focus on a specific percentage, as we do not believe our job on availability will ever be “complete”. Live and historical statistics on Salesforce system performance are publicly published at: https://trust.salesforce.com/en/#systemStatus

14.2. Incident Response Time

For non-critical cases we will respond within 2 business days. For critical cases we will respond within 1 hour.

14.3. Incident Updates

Salesforce shall send Alerts to Premier Success contacts when the services experience a service disruption which impacts several customers and lasts beyond ten minutes.

For Standard Success Customers, http://trust.salesforce.com is the only approved messaging. Customers can call into the Standard Support line and we will investigate any reported service disruptions.

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