

SUCCESS PLANS

STANDARD, PREMIER SUCCESS, PREMIER+¹, SIGNATURE for included Products²

GENERAL

Salesforce Success Plans are a subscription support offering that includes access to program resources that help all customers use and maximize their Salesforce investment.

The Standard Success Plan, and if purchased, the applicable Premier Success Plan or Signature Success Plan, will be provided to Customer's Users in accordance with the description outlined in this document. Subscriptions are organized differently based on the purchased product line, e.g., Sales, Service, etc., are organized by *org*, Marketing Cloud by *tenant*, and Commerce Cloud by *realm*. Moving forward, these are referred to as "instances." Success Plans must be purchased for all such subscriptions to included products in a given instance for the duration of the Order Term. Therefore, Customer may incur additional Success Plan charges as new subscriptions for included products are added to a given instance.

Customer is responsible for evaluating any advice or guidance received from Salesforce as part of a Success Plan and for implementing any such advice and guidance.

CONTACTING SUPPORT

Please note, Customers must call Support for Severity 1 (Critical) issues. Users can contact Support in any of the following ways:

		Standard	Premier	Signature
Case Submission	Online	Case submission is available on the Help website		
	Phone	A complete list of phone numbers and additional languages is available on the Help website		
		Available for Severity 1 Issues during designated business hours	Telephone support in English is available twenty-four hours a day, seven days a week	Customers shall engage Support on the Signature Success telephone line for high-severity issues: <ul style="list-style-type: none"> • 1-855-SFDC-911 (AMER) • 00800-7332-9111 (EMEA/APAC/LACA) • 000-800-9190055 (India) For <u>Commerce Cloud</u> : <ul style="list-style-type: none"> • United States: 1- 877-540-3032 (toll free) • Germany: +49 0800 0007626 • Australia: 1 800 290859
	Chat	N/A	Chat is available on the Help website	

¹ Premier+ is a legacy success plan, no longer offered for sale.

² Click [here](#) for full list of included and excluded products.

SEVERITY LEVELS

	Description	Standard	Premier	Signature
Initial Response Tier	Severity Level 1 - Critical Business stopping and no acceptable workaround. Imminent threat to key business or near-term business milestones posing financial risk *Exclusive to Signature Success Customers: Also includes business critical deployment issues and business-impacting performance degradations	2 days Local Business Hours	1 hour 24 x 7	15 minutes 24 x 7
	Severity Level 2 - Urgent Key business impacting, no workaround		2 hours 24 x 7	1 hour 24 x 7
	Severity Level 3 - High Key business impacting with workaround, OR non-key business impacting no workaround		4 hours Local Business Hours	
	Severity Level 4 - Medium Non-key business impacting with workaround, OR not business impacting		8 hours Local Business Hours	

DESIGNATED CONTACTS (PREMIER AND SIGNATURE SUCCESS)

“Designated Contacts” are Users Customer identifies as primary liaisons between Customer and SFDC for technical support. Customer shall identify and maintain at least one (1) Designated Contact. Customer shall notify SFDC whenever Designated Contact responsibilities are transferred to another User. Customer’s Designated Contacts shall be responsible for: 1. overseeing Customer’s support case activity, 2. developing and deploying troubleshooting processes within Customer’s organization, 3. resolving password reset, username and lockout issues for Customer, and 4. requesting Expert Coaching sessions (Accelerators) and Admin Assist services. Customer shall ensure that Designated Contacts: A. have completed, at a minimum, the basic Services administration trail on Trailhead currently titled “Admin Beginner”, which is included at no additional charge, or for MuleSoft, have completed, at a minimum, “MuleSoft Certified Developer - Level 1,” which can be taken at no additional charge by completing the free self-paced course “Anypoint Platform Development: Fundamentals”, B. are knowledgeable about the applicable Services in order to help resolve, and to assist SFDC in analyzing and resolving technical issues, and C. have a basic understanding of any problem that is the subject of a case, and the ability to reproduce the problem in order to assist SFDC in diagnosing and triaging it.

REPRODUCING ERRORS

SFDC must be able to reproduce errors in order to resolve them. Customer agrees to cooperate and work closely with SFDC to reproduce errors, including conducting diagnostic or troubleshooting activities as requested and appropriate. Also, subject to Customer's approval on a case-by-case basis, Users may be asked to provide remote access to their SFDC application for troubleshooting purposes.

SUCCESS PLAN ENTITLEMENTS

Premier/Premier + /US Premier (includes features of Standard Success Plan)

Developer Support

Provides guidance for the code-based aspects of the Salesforce platform versus configuration questions. More information on Developer Support can be found in [Help](#). Developer Support is available only in English.

Developer Support is included with the Standard Success Plan for **Heroku Enterprise**³. Developer Support provides best practices for deploying and running applications on the Heroku Platform. Developer Support is available in English only.

Expert Coaching Sessions

Expert Coaching sessions (also known as Accelerators) are interactive, outcome-based engagements with specialized resources that provide best-practice guidance and recommendations mapped to various stages of the customer lifecycle including; onboarding, implementation, optimization, and adoption. These coaching sessions are available in a variety of formats including on-demand videos and live, interactive sessions. Premier Customers may request one (1) concurrent individual Expert Coaching session per product Success Plan.

Ask An Expert Office Hour sessions are live, Q&A-based engagements where customers have an opportunity to join a group of their peers along with cloud-specific Salesforce resources. These sessions give Premier customers an opportunity to ask questions they may have regarding best practices in the areas of product setup, optimization, or adoption.

A full list of Expert Coaching sessions and Ask an Expert Office Hours topics can be found in the [Expert Coaching Catalog](#). Both Expert Coaching and Ask an Expert Office Hours sessions are subject to geographic availability, and SFDC reserves the right to modify the library and catalogs as well as delivery format from time to time at its sole discretion. Sessions are primarily available in English; Customer may inquire about availability in other languages.

Admin Assist (Premier+ only)

If Customer has purchased the Legacy Premier+ Success Plan option, SFDC will perform the [Admin Assist tasks](#) upon request and as available by product. SFDC administrators will work in tandem with the Customer's Designated Contacts to execute the Admin Assist Cases based on Customer's design

³ Click [here](#) for Standard Success for Heroku Enterprise Developer Support

specifications. Customer is responsible for gathering business and functional requirements, design specifications, change management approvals, and documentation of configuration, and for designing and/or delivering training materials. SFDC will provide two (2) complimentary User subscriptions to Customer for use by the SFDC administration team. Customer's Designated Contacts will act as Customer's sole contacts for submitting Admin Assist cases on behalf of Customer. Admin Assist cases are assigned severity level 4, and are worked on during local business hours only. Admin Assist excludes the initial implementation of the Services, data migrations, data management or manipulation (de-duping, merging, cleansing), transferring data from one "instance" or object to another, flows, AppExchange installs/uninstalls/customization, VLOOKUPS and custom code. Admin Assist is available only in English.

Signature (In order to purchase Signature for the applicable product, Customer is required to have Premier/Premier +/US Premier for the applicable product, except for MuleSoft)

Sev1 30 Minute Updates

For Severity 1 issues, SFDC shall provide updates to Customer regarding progress toward resolution at regular intervals, initially targeted to be no more than every 30 minutes (or as the parties may otherwise agree) until a resolution or work-around has been provided. Reproducible errors that cannot promptly be resolved will be escalated to Engineering for further investigation and analysis. A multi-party bridge line may be established by SFDC, in its discretion, to resolve a Severity 1 issue involving joint/multi-parties. Where two or more customers are experiencing similar Severity 1 issues, Customer may be invited to join a multi-customer bridge line established by SFDC to communicate updates to multiple customers in a scalable manner.

Post Critical Incident (Severity 1) Communications

Post Critical Incident Meetings: Following any critical incident, upon Customer's request, the parties will meet to debrief regarding the incident response. To the extent possible, the parties will collaborate to perform a root cause analysis and evaluate strategies designed to prevent a recurrence of such critical incidents.

Technical Account Management

Customer will have access to Technical Account Management coverage for the duration of the subscription term for which Customer has purchased Signature Success. The Technical Account Manager (TAM) coverage will be provided during business hours in the Customer's primary region. The TAM will engage with Customer to mutually agree on a Support engagement plan including activity prioritization and timelines. TAM activity areas may include: support case and critical incident management, support case escalation and resolution, root cause analysis communication, technical health reviews, technical performance, technical release support, feature usability and key event management. TAMs are assisted by a pool of engineers on a 24x7x365 basis to execute Signature Success support case activities as described herein. The engineers will manage Customer's support cases, in addition to other support-related activities outlined below.

Recurring Meetings

During the term of Customer's Signature Success subscription, the TAM will coordinate recurring meetings between parties to summarize and review open and closed cases, trends, and any production impacting incidents including discussion of strategies to prevent recurrence of such incidents.

Expert Coaching Sessions

Signature Customers will receive the Expert Coaching Sessions described above, except that instead of "one concurrent individual Expert Coaching session per product Success Plan," Customer may request an unlimited number of concurrent Expert Coaching sessions per product Success Plan.

Proactive Monitoring (excluding Heroku, Account Engagement, and MuleSoft)

Customer can enable Proactive Monitoring by contacting the TAM. SFDC will make commercially reasonable efforts to provide continuous 24x7 solution monitoring for a given instance. Customer can choose smart alerts from the Smart Alert [Catalog](#) ("Catalog"). Upon request, monitoring engineers may support Customer on topics such as the system alerts, alert issues uncovered, outcomes of alerting investigations, and steps that may be required for resolution of the alert issue. Customer is responsible for: (i) choosing their smart alerts from the Catalog, which is updated from time to time, and communicating same to SFDC, and (ii) participating in the onboarding process for the purposes of providing necessary information, including Customer's alert configuration requirements and alert notification contacts, which will be used to complete the monitoring plan setup. SFDC may require the use of a Marketing Cloud login-as user from time to time; during service setup and while troubleshooting and debugging issues, Customer shall provide permission for the scenarios that are deemed agreeable.

Annual Technical Health Review

Upon request, Customer will be entitled to one (1) technical health review per year, per instance. This review may include topics such as: coding and security best practices, error rate trends, and performance optimization insights & recommendations. Except for MuleSoft, Proactive Monitoring must be enabled as a prerequisite to the technical health review.

Key Event Management

TAM will align with Customer for awareness on important events including: high volume business times, customer deployment planning and monitoring, and Salesforce technical releases.

Holiday/High Volume Business Events

Upon request, Customer will be entitled to one (1) event per year, per instance. Customer must notify their TAM at least six (6) months prior to the requested event. Proactive Monitoring must be enabled and the Annual Technical Health Review must be completed as a prerequisite for support for any key event.

Ongoing Customer Deployment Events

Upon request, Support Engineers will be made available to help support a Customer's Salesforce deployment activity. Customer is entitled to support for one (1) deployment per month, per instance. In order to utilize on-call deployment support, Customer is required to

log a Support case, or request their TAM to assist with opening a Support case, to provide SFDC with notification at least seven (7) business days prior to the deployment activity. Customer must provide details of the technical scope and timing of the deployment to ensure Support has appropriate context. As part of deployment support, a Support Engineer will be assigned to the case in advance of the activity, and will monitor the deployment activity and help troubleshoot issues that might result in deployment failure. Proactive Monitoring must be enabled as a prerequisite for support for any Customer deployment event.

SFDC Technical Release Events (Major/Minor Releases)

Signature Success resources will communicate published SFDC technical updates to help Customer identify impacts and prepare for any future changes that may be required to their environment(s).

US ONLY AND GOVERNMENT CLOUD SUCCESS PLANS (PREMIER AND SIGNATURE)

US Only (Core and Marketing Cloud) subscriptions amend and supplement the Premier and Signature Success Plan, as applicable, for the available Services as set forth below:

Submitting a Case: Users can submit support cases as described in the Success Plan. Cases submitted via the Help portal will automatically be routed to Qualified US Salesforce Employees. Cases submitted outside of the Help portal (e.g., via telephone when available) will not be responded to by Qualified US Salesforce Employees, but will be routed to Qualified US Salesforce Employees by individuals who are not Qualified US Salesforce Employees and who may be located outside the United States. In order to route cases submitted outside of the Help portal, the following information will be requested from Users: first and last name, email address, username, phone number, and physical business address.

All personnel engaged outside of the Help portal, including those in customer success roles or providing customer success services (e.g., Expert Coaching, Expert Office Hours), will not be Qualified US Salesforce Employees and will only have access to Customer Data if Customer provides such personnel a User ID or otherwise enables the sharing of Customer Data with such personnel.

All support is provided in English only.

“Qualified US Salesforce Employees” are individuals who: (1) are physically located within the United States while providing Support Services; and (2) have completed a background check as a condition of their employment with Salesforce.

In addition to the terms above, *US Only Marketing Cloud - (Premier)/US Premier Success Plan for Regulated Industries - ExactTarget* have the following limited support hours: Qualified US Salesforce Employees are available Monday through Friday from 8:00 am – 8:00 pm Eastern Standard Time (EST) ("Salesforce Business Hours"). Cases requiring Log In access that are logged outside of Salesforce Business Hours, or which are not resolved during Salesforce Business Hours, will be delayed until the next business day.

Government Cloud Premier/Signature Success Plans will be provided under the terms of the Premier and Signature Success Plan, as applicable, as amended by the US Only (Core and Marketing Cloud) terms above, with the exception that all references to Qualified US Salesforce Employees shall be replaced with Qualified US Citizen Salesforce Employees.

“Qualified US Citizen Salesforce Employees” are individuals who: (1) are physically located within the United States while providing Support Services; (2) are US Citizens; and (3) have completed a background check as a condition of their employment with Salesforce.

ADDITIONAL DETAILS

Travel Expenses (Signature Success)

Any T&E expenses incurred by SFDC resources will be separately invoiced to Customer. Customer shall pay such invoice(s) in accordance with the invoicing terms of its Main Services Agreement.

Exclusions

Success Plans do not include any of the following:

- Implementation of the Services
- Assistance with Salesforce password resets. For password resets and lockouts due to incorrect login attempts, Users should click the “Forgot your password?” link on the login page or contact their system administrator or wait for the lockout period to expire. For security reasons, SFDC does not provide contact information for system administrators.
- Assistance with Salesforce usernames. For assistance with usernames, Users should contact their system administrator.
- Assistance with non-SFDC products, services or technologies, including implementation, administration or use of third-party enabling technologies such as databases, computer networks or communications systems
- Assistance with AppExchange applications, whether authored by SFDC or a third party, unless otherwise specified in our Product Inclusions and Exclusions document linked above
- Creation or testing of custom code, including SOQL queries, except as provided under Developer Support

Success Plan Materials

Any materials provided by SFDC to Customer as part of a Success Plan are the confidential information of SFDC and may not be copied, disclosed or distributed to anyone other than Customers' Users entitled to receive the applicable Success Plan. SFDC retains ownership of all intellectual property rights in the materials and reserves all rights in the materials not expressly granted to the Customer.

Changes to Success Plans

SFDC may modify Success Plans from time to time, provided the level of service under the plans will not materially decrease during a subscription term.

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