

SUCCESS PLANS

STANDARD, PREMIER, PREMIER+¹, SIGNATURE for covered Services²

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 Services (*e.g.*, Sales Cloud and Service Cloud are organized by *Org*; Marketing Cloud Engagement and Tableau Cloud are organized by *Tenant*; and Commerce Cloud is organized by *Realm*). An "Org" (or "Tenant" or "Realm" as applicable) means a unique instance of the Services, *i.e.*, a separate set of Customer Data and Customer-specific Service customizations held by Salesforce in a logically separated database (*i.e.*, a database segregated through password-controlled access).

Each Premier and Signature Success Plan provides enhanced support (as outlined below) for a set of Services (the "covered Services")², and is priced per instance. For each instance, Customer must purchase a Premier or Signature Success Plan, as applicable, that covers all subscriptions to covered Services in that instance for the duration of the Order Term. Customer may incur additional Premier or Signature Success Plan charges if new subscriptions for covered Services are added to an instance during an Order Term.

Customer is responsible for evaluating any advice or guidance received from SFDC 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: • 1-855-733-2911 (AMER) • 00800-7332-9111 (EMEA/APAC/LACA) • 000-800-9191804 (India)
	Chat	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 covered Services and applicable Premier/Signature Success Plans.

SEVERITY LEVELS³

	Description	Standard ⁴	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 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, 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.

³ All Times are Target Initial Response Times

⁴ Initial Response Tiers and Target Initial Response Times for Salesforce Standard Success Plan for Tableau Services are:

- Severity Level 1 - 8 hours (Local Business Hours)
- Severity Level 2 - 1 day (Local Business Hours)
- Severity Levels 3 & 4 - 2 days (Local Business Hours)

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 ENTITLEMENTS⁵

Premier Success Plan/US Premier Success Plan/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 included with the Standard Success Plan for **Heroku Enterprise**⁶. Developer Support provides best practices for deploying and running applications on the Heroku Platform.

Expert Coaching Sessions

Expert Coaching is a personalized 1:1 engagement between a SFDC specialist and the Customer to provide best-practice guidance and recommendations for customer-specific scenarios or use cases. A full list of Expert Coaching topics can be found in the [Expert Coaching Catalog](#). Expert Coaching is subject to geographic availability, and SFDC reserves the right to modify the library and catalog from time to time at its sole discretion.

Onboarding Engagement (excluding Heroku)

An Onboarding Engagement is a personalized 1:1 engagement between a SFDC specialist and the Customer to assist the Customer in establishing a plan to help optimize the use of its subscriptions to facilitate achieving certain business outcomes. Customers will have access to one Onboarding Engagement which may include one or more calls or virtual meetings between the SFDC specialist and the customer.

Success Reviews (excluding Heroku)

A Success Review is a personalized 1:1 engagement between a Salesforce specialist and the Customer to review the Customer's progress towards their business goals, address issues impacting usage or adoption, and help Customers identify new ways of using their Salesforce services. The Customer Success Score may also be reviewed with the Customer during this engagement. Customers will have access to two (2) Success Reviews per contract year. Each

⁵ Success Plan Entitlements are available in English and may be available in other languages

⁶ Click [here](#) for Standard Success Plan for Heroku Enterprise Developer Support

Success Review consists of one (1) call or virtual meeting between the Salesforce specialist and the customer.

.

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 Service. SFDC administrators will work in tandem with the Customer's Designated Contacts to execute the Admin Assist Cases based on Customer's design 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.

Signature Success Plan (In order to purchase a Signature Success Plan for the applicable Service, Customer is required to have a Premier Success Plan/US Premier Success Plan/Premier+ for the applicable Service, except for MuleSoft and Tableau)

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 that SFDC may be responsible for 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.

Customer Success Manager

Customer will have designated Customer Success Manager (CSM) coverage for the duration of the subscription term for which Customer has purchased Signature Success. The Customer Success Manager (CSM) coverage will be provided during business hours in the Customer's

primary region. The CSM will engage with Customer to mutually agree on a Support Engagement plan including activity prioritization and timelines. CSM activity areas may include engaging with customers to establish a plan to assist customers to achieve their business outcomes, and coordinating with technical resources for technical activities. CSMs 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.

Success Reviews (excluding Heroku)

Signature Success Plan Customers are entitled to the same Success Reviews as provided in the Premier Success Plan, except Signature Success Plan Customers will have access to four (4) Success Reviews per contract year and are orchestrated by their CSM. Each Success Review consists of one (1) call or virtual meeting between the Salesforce specialist and the customer.

Recurring Meetings

During the term of Customer's Signature Success subscription, the CSM will coordinate recurring meetings between parties to discuss mutually agreed topics. Upon customer request, CSMs may also review key open and closed cases, trends, and any production impacting incidents including discussion of strategies to prevent recurrence of such incidents.

Public Virtual Instructor-Led Classes

Signature Customers will receive unlimited complimentary Public Virtual Instructor-Led Training classes delivered by SFDC via Trailhead. Customer learners may only have one active registration for a course and must cancel any existing registration before registering for another class session of that same course. Customer learners must be active users on at least one Salesforce Org that is covered by a Signature Success Plan. Customers' Partners are not eligible for this benefit under Customers' Signature Success Plans.

Proactive Monitoring (excluding Heroku, Marketing Cloud Personalization, Tableau Software, and MuleSoft)

Customer can enable Proactive Monitoring by contacting the CSM. 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 contract 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 and Tableau Software, Proactive Monitoring must be enabled as a prerequisite for the Annual Technical Health Review.

Specialized Architect Reviews

Customer may request a Specialized Architect Review by contacting their CSM. This review will include an engagement with one or more Salesforce architects who can provide best-practices guidance and technical product recommendations to help improve Customer's use of the Services.

Key Event Management

CSM will align with Customer for awareness on important events including: high volume business times, customer deployment planning and monitoring, and SFDC 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 CSM 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. Holiday/High Volume Business Events is not available for Tableau Software except for the Tableau Server component of Tableau Software, and in that case, Proactive Monitoring is not a prerequisite for Tableau Server.

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 CSM 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. Ongoing Customer Deployment Events is not available for Tableau Software except for the Tableau Server component of Tableau Software, and in that case, Proactive Monitoring is not a prerequisite for Tableau Server.

SFDC Technical Release Events (Major/Minor Releases)

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

US Signature Success Plan, US Premier Success Plan, Government Cloud Signature Success Plan, Government Cloud Premier Success Plan , and Hyperforce Operating Zone Premier Success Plan⁷

US Signature Success Plan and US Premier Success Plan subscriptions amend and supplement the Signature and Premier Success Plans, 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 or via chat will automatically be routed to Qualified US Salesforce Employees. Cases submitted outside of the Help portal or chat (e.g., via telephone) 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 or chat, including those in customer success roles or providing customer success services (e.g., Expert Coaching), 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; and (2) have completed a background check as a condition of their employment with Salesforce.

Government Cloud Signature Success Plan and Government Cloud Premier Success Plan will be provided under the terms of the Signature Success Plan and Premier Success Plan, as applicable, as amended by the US Signature Success Plan and US Premier Success Plan 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; (2) are US Citizens; and (3) have completed a background check as a condition of their employment with Salesforce.

⁷ Available for select Success Plans, as further described [here](#).

Hyperforce Operating Zone Premier Success Plan will be provided under the terms of the Premier Success Plan, as amended by the US Premier Success Plan terms above, with the exception that all references to Qualified US Salesforce Employees shall be replaced with Qualified EU Salesforce Employees.

“Qualified EU Salesforce Employees” are individuals who (1) are physically located within the European Union while providing support (2) have completed a background check as a condition of their employment with Salesforce.

European Union Digital Operations Resilience Act (DORA) Compliance

Customers may obtain SFDC assistance to meet DORA incident management reporting requirements. This assistance is provided at no additional charge to Premier and Signature Success Plan customers, and is available to Standard Success Plan customers for an additional charge.

Tableau Software Addendum

Additional support terms for Tableau Software are provided in accordance with the Tableau Software Support Addendum available [here](#). Supported versions of Tableau Software are listed [here](#). Any versions of Tableau Software not on the aforementioned list are not covered by this Support Plan.

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 covered Services 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.

Last updated October 2025