



Climb9 for Salesforce

FAQ

051-WSP

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1 DOCUMENT INFORMATION

1.1 SECURITY

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1.2 REVISION HISTORY

Version	Editor	Date Edited	Description	Reviewer	Date Reviewed
1.0	Scott Reynolds	9 October 2020	Initial Document Creation	Mike Sowerbutts	9 October 2020
1.1	Scott Reynolds	13 October 2020	Additional Questions answered	Mike Sowerbutts	13 October 2020
1.2	Scott Reynolds	10 May 2021	New branding applied	Mike Sowerbutts	10 May 2021

2 INTRODUCTION

2.1 PURPOSE

This document was written to answer Frequently Asked Questions from customers, partners, and end-users.

2.2 REFERENCES

To collate the information provided within this document other documents have been referenced. These are highlighted where applicable.

2.3 MANAGEMENT

This document must be reviewed at least annually, and when any change in system or process is agreed, to ensure the content is up to date and the correct information communicated to employees.

3 FREQUENTLY ASKED QUESTIONS (FAQ)

3.1 HOW IS THE SOFTWARE INTEGRATED INTO CRM?

Climb9 is installed via a managed package and distributed through the Salesforce AppExchange. All communication between Climb9 and Salesforce is via the REST API using OAUTH2. The Climb9 application is accessed via a Visualforce Page in Classic mode and a Lightning Connected App in Lightning mode. Climb9 is delivered as a JavaScript application which is installed into and runs within the customer's Salesforce instance.

3.2 WHAT CUSTOMER DATA IS STORED?

Climb9 is a Native Salesforce Application meaning all data is stored within the client's Salesforce instance. Licensing data is passed from the customer's Salesforce instance to White Spring's Salesforce instance, using the REST API, this call is anonymous and includes the client Org ID and User ID for the user accessing the tool.

3.3 DO CLIMB9 EMPLOYEES AND SYSTEMS COME INTO CONTACT WITH, TRANSMIT, PROCESS OR MANIPULATE ANY CONFIDENTIAL OR PERSONAL INFORMATION AS PART OF PROVISION OF THE SERVICE?

No, all data entered into or consumed by the application remains within the client's Salesforce instance. Employees would only access data if granted login access was granted to the client's Salesforce instance.

3.4 IS VPN ACCESS TO THE CUSTOMER'S NETWORK REQUIRED?

No VPN access is required.

3.5 WILL CLIMB9 EMPLOYEES VISIT CUSTOMER OFFICES OR PREMISES AS PART OF THE SERVICE PROVISION?

No, Climb9 is a SaaS application and all services are delivered digitally.

3.6 HOW IS CUSTOMER DATA STORED?

Customer data is stored within custom objects and custom fields that are included as part of the managed installation package.

3.7 WHO HAS ACCESS TO THE DATA?

Only users of the client's Salesforce instance have access to the data, the custom objects and fields used for storing data are children of standard Salesforce objects such as Account, Opportunity and Task, access can be managed via Salesforce permissions.

3.8 HOW IS DATA SECURED?

All communication with Salesforce REST API is via HTTPS.

3.9 HOW IS SOFTWARE SECURITY MAINTAINED?

The Climb9 application is distributed via the Salesforce AppExchange and as such has passed Salesforce security review.

In addition to Salesforce Security review static code analysis is performed on our applications using WebPack

3.10 ARE ANY OTHER THIRD PARTY PROVIDERS USED TO RECEIVE, STORE, PROCESS, ACCESS OR USE CLIENT DATA?

All data remains within the client's Salesforce instance.

The following applications are used to help support the application:

- [Google Tag Manager](#) for usage analytics
- [Sentry.io](#) for client-side error reporting

3.11 DOES CLIMB9 HANDLE ANY PROTECTED HEALTH INFORMATION (PHI) OR PAYMENT CARD INFORMATION (PCI)?

No

3.12 WHAT RESILIENCE AGAINST SERVICE OUTAGE IS IN PLACE?

Climb9 runs entirely within the client Salesforce org so will always be available unless Salesforce itself has an Outage.

3.13 WHAT ARE THE RECOVERY OBJECTIVES IN THE EVENT OF A CATASTROPHIC FAILURE?

Application uptime is reliant on access to the client Salesforce instance, for details on Salesforce uptime and their SLA's please visit <https://status.salesforce.com/>

3.14 HOW LONG IS CUSTOMER DATA KEPT AT THE END OF A CONTRACT?

Customer data is stored in the customer's Salesforce org for as long as the application managed package is installed and active within their Salesforce instance.

3.15 DOES CLIMB9 HAVE AN INCIDENT RESPONSE POLICY?

Incidents e.g. outages, data breach, etc. are managed using Climb9s Incident Response Process.

3.16 HAS CLIMB9 SUFFERED ANY DATA LOSS OR SECURITY BREACH IN THE LAST 5 YEARS?

No

3.17 FROM WHICH COUNTRIES OR REGIONS WILL EMPLOYEES PROVIDE SOLUTIONS OR SERVICES?

The Climb9 solution is hosted within the clients Salesforce instance so location is determined by the Salesforce server location. Climb9 has employees located in both the United Kingdom and United States of

America. Software development activities are carried out from the United Kingdom, support activities are carried out from both the United Kingdom and United States of America.

3.18 DO YOU PERFORM BACKGROUND CHECKS ON EMPLOYEES INVOLVED IN PROVISION OF SERVICES?

All staff members involved in software development and support activities are subject to background checks.

3.19 IS CODE PEER REVIEWED?

Git based version control system is used for software development, each change is implemented as a pull request which must be peer reviewed prior to being committed to the code base.

3.20 IS THERE A CHANGE CONTROL PROCESS?

Change control is managed via JIRA issue tracking system, a ticket is created for all changes and updates required allowing items to be tracked through the change control process and ensuring correct levels of testing are carried out. Any code changes must reference the JIRA ticket ID related to the change to be accepted into the code base.

3.21 SYSTEM REQUIREMENTS

With the exception of Internet Explorer 11 and Microsoft Edge (Non-Chromium) which are not supported, Climb9 for Salesforce follows Salesforce's System requirements which can be found here:

https://help.salesforce.com/articleView?id=getstart_browser_overview.htm&type=5