



Way2Sell Toolkit for Salesforce FAQ

051-WSP W2S

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1 DOCUMENT INFORMATION

1.1 INTRODUCTION

W2S Toolkit is owned by sales-genetics GmbH & Co. KG, Bredelaerstr. 55, 40474 Düsseldorf, Germany, company registration number: HRA18799, and is developed and technically maintained by White Spring Company Limited, Castle Link, 39 North Bar, Banbury, Oxfordshire, OX16 0 TH, United Kingdom, company registration number: 04524814.

1.2 SECURITY

This document is classified as **BUSINESS USE ONLY**.

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1.3 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	Angelique Frings	15 October 2020	Updated W2S Toolkit specific information	Scott Reynolds	15 October 2020

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 W2S Toolkit and Microsoft Azure 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?

W2S Toolkit is installed via a managed package and distributed through the Salesforce AppExchange. All communication between W2S Toolkit and Salesforce is via the REST API using OAUTH2. The W2S Toolkit application is access via a Visualforce Page in Classic mode and a Lightning Connected App in Lightning mode. W2S Toolkit is delivered as a JavaScript application which is installed into and runs within the customers Salesforce instance.

3.2 WHAT CUSTOMER DATA IS STORED?

W2S Toolkit is a Native Salesforce Application meaning all data is stored within the clients Salesforce instance. Licensing data is passed from the customers 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 SALES-GENETICS OR WHITE SPRING 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 clients Salesforce instance. Employees would only access data if granted login access was granted to the clients Salesforce instance.

3.4 IS VPN ACCESS TO THE CUSTOMERS NETWORK REQUIRED?

No VPN access is required

3.5 WILL SALES-GENETICS OR WHITE SPRING EMPLOYEES VISIT CUSTOMER OFFICES OR PREMISES AS PART OF THE SERVICE PROVISION?

No, W2S Toolkit 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 clients 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 W2S Toolkit 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 W2S TOOLKIT HANDLE ANY PROTECTED HEALTH INFORMATION (PHI) OR PAYMENT CARD INFORMATION (PCI)?

No

3.12 WHAT RESILIENCE AGAINST SERVICE OUTAGE IS IN PLACE?

W2S Toolkit 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 W2S TOOLKIT HAVE AN INCIDENT RESPONSE POLICY?

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

3.16 HAS W2S TOOLKIT 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 W2S Toolkit solution is hosted within the clients Salesforce instance so location is determined by the Salesforce server location. White Spring 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.

Sales-genetics has employees located in Germany and will provide support and services from here.

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, W2S Toolkit for Salesforce follows Salesforce's System requirements which can be found here:

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