2.0 Incapsulate Cost Proposal

2.1 Base Period Pricing

Item	Description	Unit	Cost	Notes
1	Installation/Implementation	1	$395,723.80	fixed price costs for implementation tasks
2	Training	1	$0.00	Included in Implementation
3	Licensing/Subscription Costs Year 1	1 yr	$610,343.91	Includes Capsule Subscription, Basic Support, 390 internal Service Cloud Users and 250 Mobile Worker Users. See attached license quote for Details.

The Total Amount of Proposal is **$1,006,067.71**.

The above amount shall include any and all applicable taxes.

Estimated Annual Subscription and Support Detail	
Subscription purchased from Incapsulate	**Cost**
CRM Capsule - All Departments + 250 Mobile Worker App Users	$85,000.00
Managed Services Basic support	$30,000.00
Incapsulate Total Year 1 Costs	**$115,000.00**
Subscription purchased from Carahsoft	**Cost**
Service Cloud Unlimited Edition 390 users	$374,400.00
Gov Cloud Plus 15% Net Price	$37,679.98
Customer Community Logins 200 per month	$2,380.00
Shield	$79,123.96
Heroku - 5 Dyno Units	$1,759.97
Carahsoft (Salesforce) Total Year 1 Costs	**$495,343.91**
Annual Subscription Detail Total - Year 1 Costs	**$610,343.91**

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2.2 Option Period Pricing (3.5% Escalation per Year)

Item	Description	Unit	Incapsulate	Carahsoft	Total
1	Licensing/Subscription Costs Option 1 - Year 1	per year	$119,025.00	$512,680.95	$631,705.95
2	Licensing/Subscription Costs Option 1 - Year 2	per year	$123,190.88	$530,624.78	$653,815.65
3	Licensing/Subscription Costs Option 1 - Year 3	per year	$127,502.56	$549,196.65	$676,699.20
4	Licensing/Subscription Costs Option 1 - Year 4	per year	$131,965.15	$568,418.53	$700,383.68
5	Licensing/Subscription Costs Option 1 - Year 5	per year	$136,583.93	$588,313.18	$724,897.10

2.3 Assumptions

- This plan assumes out of the box 311 capsule implementation without any customizations
- The implementation plan assumes a fresh production org for 311 implementation
- The proposed plan assumes 4 sandboxes to be spun up. Implementation will follow the standard route. Dev > QA > Production.
- The proposed plan assumes Incapsulate will configure 50 Service Request (SR) types, 25 Knowledge Articles, 10 Reports and 5 Dashboards in scope
- SR types above 50 will be configured and tested by the city admin team trained by Incapsulate during the project.
- The proposed plan assumed that console, web portal, worker and citizen apps are in scope
- AWS setup will be used for Mobile Worker APP
- Incapsulate assumes the City would procure and provide access to Google and Apple Developer Accounts for Citizen App and Apple Enterprise Account for Worker iOS App.
- Incapsulate assumes Standard Salesforce Reporting Capabilities. No Custom Reports are in scope.
- SSO is an option but is out of scope for this project.
- 311Vision is a paid feature that is out of scope for this project, but can be added after GoLive by the City as an example of how AI and machine learning can be used going forward with the CRM Capsule and Salesforce.
- For SMS/Text Feature, Incapsulate assumes that a solution with Twilio/OneReach will be covered on the product on R16 and hence it can be included in this implementation. If we go with OneReach, Twilio will be out of scope and the client will have to take the OneReach cost.
- Data Migration is considered only to load the contacts/users. No service requests will be migrated.
- ADA Compliance - For now we have not considered Web 2.0 and Mobile 2.0 in scope. If the release timeline for both matches the implementation timeline, we will include them else we should take a route to upgrade web and mobile as managed service.

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- Only consultation has been considered in scope for 3rd Party Integration. (Corrigo, Infor and Accela). Incapsulate consultation hours are limited to 150 hours.
- CTI Integration - The City needs to procure an Appexchange CTI Connector such as TenFold from Bucher-Suter or Similar. Pricing and approach for CTI can be confirmed during the project.
- Chatbot is in Scope as outlined in the response
- Push Notification implementation is considered with Amazon Pinpoint service as that works with our on 311 Capsule product.
- Subscription cost of Amazon Pinpoint applies to the Push Notification feature and would need to be purchased separately by the City from Amazon.
- Salesforce licenses will be purchased from Carahsoft as quoted in section 2.5, not from Incapsulate.

- **Question 1: What type of ADA Compliance Versions that you follow?**
- Response: Incapsulate's 311 Capsule solution is native to Salesforce and we adopt Salesforce ADA Compliance.
- For the most recent ADA Compliance see link - https://www.salesforce.com/company/legal/508_accessibility/
- Salesforce Customer Service ACR - https://www.salesforce.com/content/dam/web/en_us/www/documents/legal/508%20accessibility/customer-service_acr_oct2021.pdf
- Experience Cloud – Aura (Desktop and Web Mobile) ACR - https://www.salesforce.com/content/dam/web/en_us/www/documents/legal/experience-cloud-aura-acr-august2022.pdf
- **Question 2: Have you done a VPAT (Voluntary Product Accessibility Template)?**
- Response: See response above, the link above also includes the latest VPAT report
- **Question 3: What are your SSO costs?**
- Response: As part of the licenses purchased the Salesforce platform provides SSO functionality without any additional cost. Incapsulate has already included the cost for enabling and configuring SSO in the CRM Replacement Project. SSO will be enabled using the City's Active Directory. See screenshot below

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2.4 Cost Form

Proposer's Name Incapsulate, LLC

COST PROPOSAL
REQUIREMENTS CONTRACT FOR CITY OF FRESNO CRM REPLACEMENT

REQUEST FOR PROPOSALS NO. 12300269

TERM OF CONTRACT The Contract for implementation services shall be in effect for one (1) year from the date of the Notice to Proceed. The Contract term for any software licensing/subscription shall be in effect for one (1) year from the date of the Notice to Proceed with the option for four (4) five (5) year extensions. The Contract may be extended in accordance with the provisions set forth in the Special Conditions of these Specifications.

TO THE PURCHASING MANAGER, CITY OF FRESNO

Having carefully examined the Request for Proposals, attachments and related documents, the undersigned proposes and agrees to provide to the City of Fresno, in accordance with the Specifications annexed hereto and made a part thereof, the following services at the following rates:

ITEM	DESCRIPTION	UNIT	COST
1	Installation/Implementation	Lump Sum	$395,723.80
2	Training	Lump Sum	Included in Implementation
3	Licensing/Subscription Costs – Per Year	Lump Sum	$610,343.91

The Total Amount of Proposal is $1,006,067 **Dollars and** 71 **Cents**.

The above amount shall include any and all applicable taxes.

Please include and itemize an estimated annual subscription cost.

The quantities listed on the proposal page(s) are estimates for the initial term. The actual requirement of the City may be more or less than the quantities specified. The City will pay for only those items which it actually delivered or received during the term of the Contract.

The City reserves the right to reject any and all proposals.

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2.5 Carahsoft Quote

GOVERNMENT PRICE QUOTATION

SALESFORCE.COM GOVERNMENT at CARAHSOFT

CARAHSOFT TECHNOLOGY CORP.
11493 SUNSET HILLS ROAD | SUITE 100 | RESTON, VIRGINIA 20190
PHONE (703) 871-8500 | FAX (703) 871-8505 | TOLL FREE (888) 662-2724
www.carahsoft.com | sales@carahsoft.com

TO:	Bryon Horn Chief Information Officer FRESNO 2600 Fresno St Room 1059 Fresno, CA 93721 USA	FROM:	Bailey McCummings Carahsoft Technology Corp. 11493 Sunset Hills Road Suite 100 Reston, Virginia 20190
EMAIL:	Bryon.Horn@fresno.gov	EMAIL:	Bailey.McCummings@Carahsoft.com
PHONE:	(559) 621-2489	PHONE:	(571) 662-3422 FAX:

TERMS:	FTIN: 52-2189693 Shipping Point: FOB Destination Remit To: Same as Above Payment Terms: Net 30 (On Approved Credit) Cage Code: 1P3C5 DUNS No: 088365767 UEI: DT8KJHZXVJH5 Credit Cards: VISA/MasterCard/AMEX Sales Tax May Apply

QUOTE NO:	39012814
QUOTE DATE:	05/09/2023
QUOTE EXPIRES:	06/08/2023
RFQ NO:	
SHIPPING:	ESD
TOTAL PRICE:	$495,343.91
TOTAL QUOTE:	$495,343.91

LINE NO.	PART NO.	DESCRIPTION	-	QUOTE PRICE		QTY	EXTENDED PRICE
1	121-0225	Heroku - 1 Dyno Unit (Per Month) Salesforce.com, Inc. - 121-0225 Start Date: 06/12/2023 End Date: 06/11/2024		$351.9936	OM	5	$1,759.97
2	121-0218	Salesforce Shield 30% Net Price Salesforce.com, Inc. - 121-0218 Start Date: 06/12/2023 End Date: 06/11/2024		$79,123.96	OM	1	$79,123.96
3	121-0175	Government Cloud Plus 15% Net Price Salesforce.com, Inc. - 121-0175 Start Date: 06/12/2023 End Date: 06/11/2024		$37,679.98	OM	1	$37,679.98
4	121-0130	Customer Community - Logins Unlimited Edition Salesforce.com, Inc. - 121-0130 Start Date: 06/12/2023 End Date: 06/11/2024		$11.90	OM	200	$2,380.00
5	121-0093	Service Cloud Unlimited Edition Salesforce.com, Inc. - 121-0093 Start Date: 06/12/2023 End Date: 06/11/2024		$960.00	OM	390	$374,400.00
		SUBTOTAL:					$495,343.91
				TOTAL PRICE:			**$495,343.91**
				TOTAL QUOTE:			**$495,343.91**

CONFIDENTIAL
PAGE 1 of 3

QUOTE DATE: 05/09/2023
QUOTE NO: 39012814

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PHONE (703) 871-8500 | FAX (703) 871-8505 | TOLL FREE (888) 662-2724
www.carahsoft.com | sales@carahsoft.com

LINE NO.	PART NO.	DESCRIPTION	-	QUOTE PRICE	QTY	EXTENDED PRICE

Must reference Carahsoft Quote #39012814 on Purchase Order

Quote Special Terms

Service Cloud - Unlimited Edition subscriptions ordered hereunder at pricing of $80/User/Month are Restricted Use Subscriptions, and shall be subject to the following restriction(s): Restricted Use Subscriptions shall (1) only be provisioned to City of Fresno 311; (2) not be transferred to another Org; (3) not include any of the following functionality(ies) (by tab, as applicable): Leads, Opportunities, Assets, Campaigns, Products & Price Books; (4) be used only for the following purpose(s): supporting 311 activities or cases for the call center(s) and agencies that provides for a single point in entry/inquiry for citizen interaction with the Customer 6) be used only by the following type(s) of Users: 311 Customer Service employees and City employees that are responding to a case from the 311 system. These restrictions shall be cumulative and shall apply to all Restricted Use Subscriptions purchased under this Order Form. Customer must strictly segregate all Restricted Use Subscriptions from any full-featured subscriptions it may hold by setting up and enforcing a unique profile in the Service associated with such Restricted Use Subscriptions. Customer understands that the above functionality limitations are contractual in nature (i.e., the functionality itself has not been disabled as a technical matter in the Service) and therefore agrees to strictly monitor its Users' use of such Restricted Use Subscriptions and enforce the applicable restrictions. Salesforce.com may audit Customer's use of Restricted Use Subscriptions at any time through the Service. Should any audit reveal any unauthorized use of Restricted Use Subscriptions, Customer agrees it will pay, within thirty (30) days of notice of the audit results, the difference between the contract price for Restricted Use Subscriptions and the list price for full subscriptions of the above-named product, for all of the Restricted Use Subscriptions showing unauthorized use (taken as a group), beginning with the date of the first violation through the end of the then current subscription term. Upon such payment, all such Restricted Use Subscriptions showing unauthorized use will be converted into full subscriptions for the remainder of the then current subscription term.

Only Services on this Order Form that are identified by SKU in the Government Cloud Plus Products list available at https://www.salesforce.com/company/legal/agreements/, as updated from time to time, are Government Cloud Plus Products. All other Services are non-Government Cloud Plus products. The Government Cloud Available Products and Features Knowledge Article available at https://help.salesforce.com/articleView?id=000321821&type=1&mode=1 ("Knowledge Article") identifies "Interoperable (but not authorized)" products and features which are compatible with Government Cloud Plus Products, in the manner as described in the Documentation. Customer has sole responsibility, prior to using new products or features with Government Cloud Plus Products, to determine if such products or features are within the Government Cloud Plus authorization boundary, as described in the Knowledge Article, and for maintaining the settings in its Salesforce Government Cloud Plus Org for the Org to remain compliant with the Government Cloud Plus authorizations. Salesforce provides customers with a Configuration User Guide available at https://publicsector-compliance-us.my.salesforce.com/ to assist with the setup and configuration process. "Org" means a unique instance of the Services, i.e., a separate set of Customer Data and Customer-specific Service customizations held by SFDC in a logically separated database (i.e., a database segregated through password-controlled access). Customer acknowledges that the "Interoperable (but not authorized)" products and features, as well as any Non-SFDC Applications that interoperate with the Customer's Salesforce Government Cloud Plus Org, fall outside of the Government Cloud Plus authorization boundary. In light of the foregoing, Customer understands and agrees that its Customer Data will be shared with "Interoperable (but not yet authorized)" products and features and Non-SFDC Applications that interoperate with its Salesforce Government Cloud Plus Org.

Any increase in subscription pricing (excluding support and resource-based Services) for the first renewal term will not exceed 5% over the then-current subscription pricing, provided that (a) Customer renews its entire then-current subscription volume under this Order Form combined with any associated add-on Order Forms, and (b) the first renewal term is the same duration as the Order Term of this Order Form or one year (whichever is longer). Thereafter, any increase in subscription and support pricing will be in accordance with SFDC's pricing and policies in effect at the time of the renewal or as otherwise agreed to by the parties.

Product Special Terms

Heroku - 1 Dyno

Each Heroku - 1 Dyno Unit (Per Month) subscription includes 750 Dyno hours per month. Customer understands that the above limitation is contractual in nature (i.e., this limitation is not enforced in the Services as a technical matter) and therefore agrees to strictly review its Users' use of such subscriptions and enforce such limitation. SFDC may review Customer's use of such subscriptions at any time through the Services. If in any calendar month, Customer exceeds its permitted number of Dyno hours, SFDC reserves the right to charge Customer list price for as many additional Heroku - 1 Dyno Unit (Per Month) needed to cover all Dyno hours consumed in excess of the permitted number of Dyno hours. Such additional fees will be charged to Customer monthly in arrears via the billing or payment method specified above.

Government Cloud Plus

The Government Cloud Plus subscription: (i) provides an isolated infrastructure for hosting authorized Salesforce Services, with additional controls specifically for US government customers and US government contractors, as further described in the Trust and Compliance Documentation (available at https://www.salesforce.com/company/legal/trust-and-compliance-documentation/); and (ii) amends and supplements the Premier Success Plan (available at https://sfdc.co/bDsV6q) for Services available on the Government Cloud Plus infrastructure as set forth below. The terms in the Premier Success Plan shall apply, except as otherwise set forth herein. For the purposes of this Product Special Term, "Qualified US Citizens" are individuals who: (1) are United States citizens; (2) are physically located within the United States while providing Premier Support Services; and (3) have completed a background check as a condition of their employment with Salesforce. Submitting a Case: Users can submit support cases as described in the Premier Success Plan. Cases submitted via the Help portal will automatically be routed to Qualified US Citizens. Cases submitted outside of the Help portal (e.g. via telephone or chat, when available) will not be responded to by Qualified US Citizens. These individuals will route cases to a team of Qualified US Citizens and will access the following information about Users in order to route the calls to Qualified US Citizens: first and

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LINE NO.	PART NO.	DESCRIPTION	-	QUOTE PRICE	QTY	EXTENDED PRICE

last name, email address, username, phone number, and physical business address. All support is provided in English only. 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 Citizens 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.

Salesforce Shield

In order to use the Einstein Data Detect and Code Spec features, Customer's system administrator must first install the managed package available at: https://sfdc.co/install-datadetect.

Customer must reference Quote number and Contract # on Purchase Order.

Should Customer purchase via Reseller all terms of Carahsoft Quote must be incorporated in Reseller quote and Customer Purchase Order to Reseller.

Any increase in subscription pricing (excluding support and resource-based Services) for the first renewal term will not exceed 5% over the then-current subscription pricing, provided that (a) Customer renews its entire then-current subscription volume under this Order Form combined with any associated add-on Order Forms, and (b) the first renewal term is the same duration as the Order Term of this Order Form or one year (whichever is longer). Thereafter, any increase in subscription and support pricing will be in accordance with SFDC's pricing and policies in effect at the time of the renewal or as otherwise agreed to by the parties

Licensee agrees that any order for Salesforce Services will be governed by the terms and conditions of the Carahsoft Salesforce Service Terms, copies of which are found at https://carah.io/SFDC-TOU and all Schedules and Documentation referenced by the Terms are made a part hereof. The parties agree that any term or condition stated in a Customer purchase order or in any other Customer order documentation (excluding Quotes) is void. In the event of any conflict or inconsistency among the following documents, the order of precedence shall be: (1) the applicable Quotes (and their Contract Vehicle), (2) the TOU, and (3) the Documentation. Licensee acknowledges it has had the opportunity to review the Terms, prior to executing an order.

Product Terms Directory: http://carah.io/Product-Terms-Directory
Help & Training: http://carah.io/Help
Government Cloud Plus: http://www.carahsoft.com/government-cloud-terms

A list of currently available FedRAMP/IL4 Authorized Salesforce products can be found here:
https://help.salesforce.com/articleView?id=000270080&language=en_US&type=1

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