

KAPTIO

Edge Platform: What It Means for Intrepid

Platform Architecture, Capability Roadmap, and Commercial Framework

Part 1 of the Phase 3 Partnership Framework

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Prepared for Intrepid Travel

Confidential

What Edge Is

In recent discussions, you raised important questions about what Edge means for Intrepid — licensing, upgrade path, commercial implications, and operational impact. This document addresses those questions directly.

YOUR SALESFORCE ORG — STAYS HERE, UNCHANGED

Data Model	Packages, Itineraries, Bookings, Contacts
Business Logic	Apex triggers, flows, validation rules
User Identity	Salesforce users, profiles, permissions



JWT TOKENS — NO SEPARATE LOGIN, NO USER PROVISIONING

EDGE PLATFORM — FASTER, SCALABLE, FLEXIBLE

User Experience	Purpose-built web apps, embedded in Salesforce or standalone
Compute	Pricing, rendering, search, availability — no governor limits
Services	Documents, payments, booking flows, automation

Parts of the platform have always operated this way — KTAPI, the engine powering search, pricing, availability, and booking, has been running off-Salesforce since day one. Edge formalises this proven pattern and extends it to the user experience layer.

EDGE IS

EDGE IS NOT

An architecture that makes existing features faster and better — at no additional licensing cost

A paid upgrade for capabilities you already use

Also the foundation for genuinely new products — discussed commercially before we build

Bundling new products into existing licensing without discussion

Purpose-built services that extend Salesforce

A replacement for Salesforce

Gradual, non-disruptive — modules transition behind the scenes

A big-bang migration event

What Intrepid IT Needs to Do

Nothing. Edge integrates seamlessly into your existing Salesforce environment.

STEP 1

User logs into Salesforce as normal. Salesforce manages all user identity, profiles, and permissions. Nothing changes for your admins.



AUTOMATIC

Signed JWT token generated automatically. Carries user identity, org context, and permissions. No manual step.



STEP 2

Edge app opens inside Salesforce as a tab or panel. Knows who you are, which org you are in, and what you can access. No separate login.

Summary

- ✓ No user provisioning in Edge
- ✓ No SSO configuration
- ✓ No licence seat management for Edge
- ✓ No data migration — Edge reads from and writes to your Salesforce org
- ✓ Salesforce remains the identity provider and system of record

Why We Are Doing This

Four forces are driving this architectural evolution.



Performance and Scale

Salesforce imposes hard ceilings — CPU time limits, heap size, API quotas. When your business grows, these ceilings do not move. Edge removes them.

The Edge save-API persists a 16-item itinerary in ~3s (2.3x faster than the legacy path, full data parity). Edge Docs editor loads in ~4s with parallel data fetching (2.4x faster than sequential). Cached PDFs serve in under 1s. All without Salesforce governor limits.



User Experience

Lightning pages load inside the Salesforce container with limited layout flexibility. Edge apps deliver modern, responsive, purpose-built experiences.

Document proposals that were basic LWC components are now full-page Edge Docs with branded templates, PDF generation, and live preview.



Speed of Innovation

Salesforce managed package releases follow a 6-8 week cycle. Edge services deploy continuously — fixes and features reach you in days.

Edge apps deploy to UAT independently of Salesforce packages — your team tests iterations in sandbox without a managed package upgrade. Feedback loops happen in days, not release cycles.



Cost Efficiency

Salesforce API limits and storage costs grow linearly with usage. Edge services scale elastically and cost less per transaction at volume.

As your business grows, Edge platform economics improve rather than degrade. No governor limit upgrades required.

Four Patterns of Edge Adoption

Not all Edge capabilities are created equal. Here is how we categorise what Edge enables and what it means commercially.

FASTER

Ship UX Faster

No managed package release cycle. We build and deploy new user experiences in days, not the 6-8 week Salesforce release cadence. You get features sooner.

No licence change — you benefit from faster delivery

WIDER

Beyond Salesforce

Edge apps can be embedded in Salesforce, served as standalone portals, white-labelled for trade partners, or offered direct to consumers. The platform is no longer locked to a single surface.

No licensing change for internal use. Multi-channel distribution (trade, white-label, D2C) discussed as new capability.

BETTER

Improve Existing

Existing features rebuilt at parity, then expanded. Adopt when ready. We build at parity first so you can switch without disruption, then we extend with richer capability.

No additional licensing — parity features are included. Adoption scheduled through BAU.

NEW

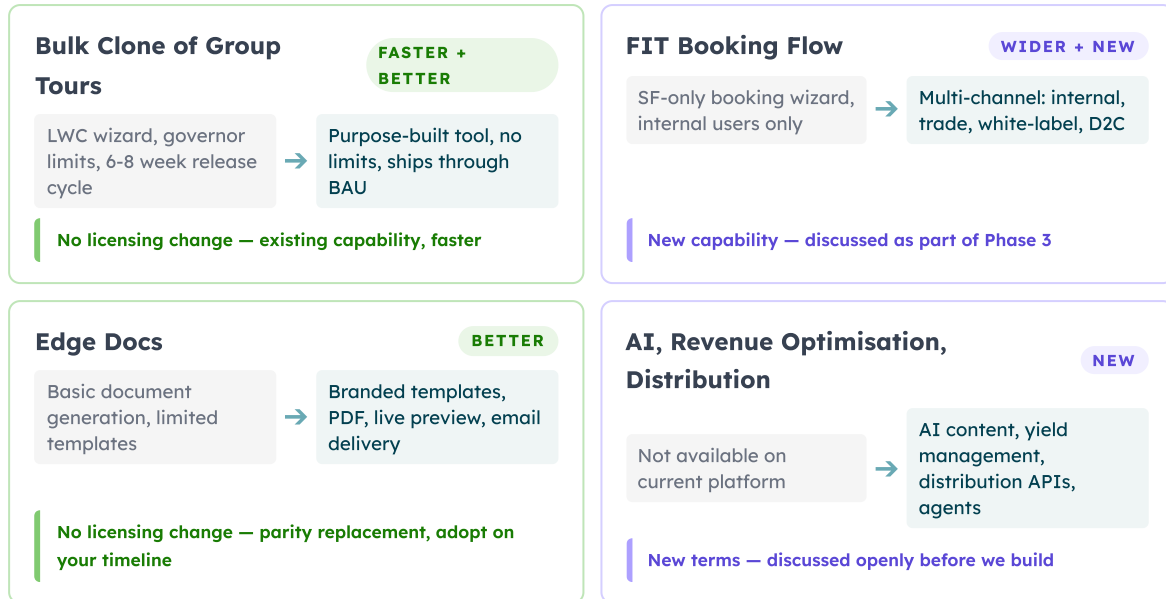
Net-New Capabilities

Capabilities that never existed on the platform — AI agents, multi-channel booking flows, revenue management, distribution APIs. Genuinely new value.

New commercial terms — discussed openly before we build

How This Applies to Intrepid

Four concrete examples from work already in flight or planned, mapped to the adoption patterns and their commercial implications.



Module Transition Map

What is already on Edge, what is coming, and what remains on Salesforce today.

LIVE TODAY Docs, Pay, Brief, Canvas, Admin	TARGET H2 2026 Journeys, Operations, Agents	ON SALESFORCE CRM, Data Model, Reports
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LIVE ON EDGE TODAY

APP	WHAT IT DOES
Edge Docs	Branded proposals, quotes, trip documents. PDF generation, live preview, email delivery.
Edge Pay	Payment collection — deposits, balances, multi-gateway, FX, payment health.
Edge Brief	Departure content preparation for ops teams.
Edge Canvas	Dynamic configurable components embedded in Salesforce.
Edge Admin	Tenant configuration gateway. Blueprints, templates, OAuth.

COMING — TARGET H2 2026

APP	WHAT IT DOES	RELEVANCE TO INTREPID
Edge Journeys	Multi-channel booking flow studio for internal, trade, white-label, and D2C.	Supports TailorMade and the multi-channel direction. The FIT booking flow demonstrated to Intrepid TailorMade leadership.
Edge Operations	Operational workflows — cloning, manifests, vouchers, bulk ops, amendments.	Directly addresses cloning and product lifecycle BAU pain points.
Edge Agents	Specialised AI agents — automation, data loading, support triage.	Contract ingestion, rate loading, operational automation for BAU efficiency.

CURRENTLY ON SALESFORCE

MODULE	STATUS
CRM and Contact Management	Remains on Salesforce. Future decisions made in partnership with customers.
Core Data Model	Packages, itineraries, services, departures — Salesforce remains the system of record.
Reports and Dashboards	Standard Salesforce reporting continues as-is.

Timelines are indicative and subject to roadmap prioritisation.

Platform Operations and Security

Edge runs on enterprise-grade cloud infrastructure with the same security posture as the API services Intrepid already depends on.

Security and Data Protection

Data residency — Customer data stays in the Salesforce org. Edge services read and write back via authenticated APIs. No data is stored outside your org.

Encryption — All traffic encrypted in transit (TLS 1.2+). Secrets managed via encrypted vault, never in code or config.

Authentication — Signed JWT tokens issued by Salesforce. No separate credential store. No passwords transmitted to Edge.

Access control — Edge inherits Salesforce user profiles and permissions. No additional identity layer to manage.

Infrastructure — Hosted on Google Cloud Platform (GKE) in europe-west1. Same infrastructure tier as KTAPI, which Intrepid has depended on since Phase 1.

Operations and Reliability

Monitoring — Prometheus metrics, structured logging (Loki), distributed tracing (OpenTelemetry/Tempo). Centralised in Grafana dashboards.

Incident response — Automated alerting on error rates, latency, and availability. On-call engineering rotation.

Deployment — GitLab CI/CD pipelines. Every change goes through automated build, test, and security scan before reaching production.

Rollback — Production deployments are reversible within minutes. No dependency on Salesforce package version management.

UAT and Sandbox Rollout

Independent deployment — Edge apps deploy to UAT/sandbox environments independently of Salesforce managed package upgrades.

Rapid iteration — Your team can test Edge features in sandbox and provide feedback. We iterate and redeploy without waiting for a Salesforce release cycle.

Production isolation — UAT changes never impact production. Environments are fully separated at the infrastructure level.

Audit and Compliance

Audit trail — All Edge API calls are logged with user identity, timestamp, and action. Available for compliance review.

SOC 2 alignment — GCP infrastructure is SOC 2 Type II certified. Kaptio's operational practices align with SOC 2 controls.

GDPR — No personal data stored outside Salesforce. Edge services are processing-only — your org is the controller.

The Commercial Framework

A clear, simple model for what is included and what requires new terms.

Existing Capability, Better Delivery

If Edge replaces or improves a module you already license, there is no additional licensing charge. This is our internal architectural decision. Adoption and configuration are scheduled through your existing BAU engagement.

Price calculations — Apex to Edge compute. Same function, faster, no limits.

Document proposals — LWC to Edge Docs. Same feature, richer experience.

Payment collection — Visualforce to Edge Pay. Same flow, modern UX.

Configuration setup — Manual to Edge Foundation. Same outcome, AI-assisted.

Bulk clone tools — Salesforce to Edge. Same capability, no governor limits.

New Capability, New Value

If Edge enables a capability that genuinely did not exist before, we discuss commercial terms openly before we build.

Multi-channel booking flows — B2C, trade portals, white-label distribution.

AI content generation — Automated proposals, smart recommendations.

Revenue optimisation — Yield management, dynamic pricing, promotions.

Supplier contract management — AI-assisted contract ingestion, automated rate loading.

Distribution APIs — Third-party marketplace connectivity.

AI-powered operational tools — Operational automation, support, implementation.

Platform stability and performance within the scope of your existing licensing is our responsibility.

Where we choose to resolve issues through Edge architecture rather than Salesforce, that is our investment decision, not yours.

This document is the first in a series supporting the Phase 3 evaluation and partnership framework between Kaptio and Intrepid Travel.