Entitlements & SLAs

Exercise Guide

dream*force* ®

Intro: Training Org Login

Goal:

Log into your Salesforce org.

Tasks:

1. Navigate to the Salesforce login page.
2. Log in with your username and password.

Time:

5 minutes

Instructions:

1. Navigate to the Salesforce login page.

   A. Open an internet browser.
   B. Enter `login.salesforce.com` into the browser's address bar.
   C. Press **Enter**.

2. Log in with your username and password.

   A. Enter your username and password.

   User Name: _____

   Password: _____

   B. Click **Log in to Salesforce**.

Exercise 1: Create Business Hours and Holidays

Goal:

Create several custom business hours and a custom holiday.

Scenario:

You are configuring your instance for a new support center. You support center offers three different business hour options. These options are 9x5, 9x7 and 24x7. However you do not offer support for the Fribsday holiday for your customers that do not have 24x7 support.

Tasks:

1. Create business hours for each of your supported hours.
2. Create a holiday for Fribsday

Time:

5 minutes

Instructions:

1. Create the 9x5 business hours.
   A. Click **Setup | Company Profile | Business Hours.**
   B. Click **Edit,** next to the `Default` business hours and fill in the following information.
      i. **Name:** `9x5`
      ii. **Use these business Hours as the default:** `checked`
      iii. **Active**: `checked`
      iv. **Timezone**: `(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)`
      v. **Business Hours:**

2. Create the 9x7 business hours
   A. Click **New Business Hours.**
   B. Fill in the following information.
      i. **Name:** `9x7`
      ii. **Use these business Hours as the default:** `unchecked`
      iii. **Active**: `checked`
      iv. **Timezone**: `(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)`
      v. **Business Hours:**

3. Create the 24x7 business hours
   A. Click **New Business Hours.**
   B. Fill in the following information.
      i. **Name:** `24x7`
      ii. **Use these business Hours as the default:** `unchecked`
      iii. **Active**: `checked`
      iv. **Timezone**: `(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)`
      v. **Business Hours:**

   C. Click **Save**
4. Create the Fribsday holiday
   A. Click **Company Profile | Holiday**
   B. Click **New**
   C. Fill in the following information
      i. **Name:** `Fribsday`
      ii. **Description:** `The most casual of days`
      iii. **Date:** The date of tomorrow
      iv. **Time (All day)**: `checked`
      v. **Recurring Holiday:** `unchecked`
   D. Click **Save**
   E. Under **Business Hours** click **Add/Remove**
   F. Choose `9x5` and `9x7` and add them to the **Selected Business Hours** column
   G. Click **Save**

Exercise 2: Enable Entitlement Management and Setup Case Page

Goals:

Enable entitlement management and add entitlement information to case layout

Scenario:

To reduce the amount of custom work you have to do, you decide to use the standard Entitlement object and use it with your support cases.

Tasks:

1. Enable Entitlement Management
2. Configure Entitlement Management
3. Set Field Level Security for Entitlement related fields
4. Add fields to Case Layout
5. Add related list Account Layout

Time:

5 Minutes

Instructions:

1. Enable Entitlement Management
   A. Click **Customize | Entitlement Management | Settings**
   B. Check `Enable Entitlement Management`
   C. Click **Save**
2. Configure Entitlement Management
   A. Check `Enable Entitlement Versioning`
   B. Under **Entitlement Lookup** check the following fields

   Entitlement Lookup - Limit to entitlements with:
   ☑ Active Status
   ☑ Same account on the case
   ☐ Same asset on the case
   ☐ Same contact on the case

   C. Click **Save**
3. Set Field Level Security for Entitlement fields
   A. Click **Customize | Cases | Fields**
   B. Click **Entitlement Name**
   C. Click **Set Field-Level Security**
   D. Select `Visible` for all Profiles
   E. Click **Save**
   F. Repeat A-E for **Business Hours, Entitlement Process End Time, Entitlement Process Start Time, Milestone Status, Milestone Status Icon**
4. Add fields to Case Layout
   A. Click **Customize | Cases | Page Layouts**
   B. Click **Edit** next to **Case Layout**
   C. Add the following fields to the page layout: **Entitlement Name, Entitlement**

Process End Time, Entitlement Process Start Time, Milestone Status, Milestone Status Icon

    D. Add the **Case Milestones** related list

    E. Click **Save**

5. Add related lists to Account Layout

    A. Click **Customize | Accounts | Page Layouts**

    B. Click **Edit** next to **Account Layout**

    C. Add the **Entitlements** related list

    D. Click **Save**

Exercise 3: Create Entitlement Processes and Milestones

Goals:

Create case milestones and create entitlement processes.

Scenario:

Your support organization offers Premium and Standard levels of support based on the table below.

		High	Normal
Premium	**First Response**	1 Hour	6 Hours
	Case Closure	2 Business Days	6 Business Days
Standard	**First Response**	4 Business Hours	12 Business Hours
	Case Closure	4 Business Days	8 Business Days

		High	Normal
Premium	**First Response**	60 Minutes	6 Hours
	Case Closure	2 Business Days	6 Business Days
Standard	**First Response**	4 Business Hours	12 Business Hours
	Case Closure	4 Business Days	8 Business Days

Tasks:

1. Create the First Response and Case Closure milestones
2. Create Premium and Standard entitlement processes
3. Add case milestones to meet your expected response times.

Time:

15 minutes

Instructions:

6. Create the First Response and Case Resolution milestone
   A. Click **Customize | Entitlement Management | Milestones**
   B. Click **New Milestone**
   C. Fill in the following information
      i. **Name:** `First Response`
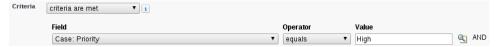   ii. **Description:** `The first response to the case`
      iii. **Recurrence Type:** `No Recurrence`

D. Click **Save & New**

E. Fill in the following information

    i. **Name:** `Case Resolution`

    ii. **Description:** `The resolution of the case`

    iii. **Recurrence Type:** `Independent`

F. Click **Save**

7. Create the Premium entitlement process

A. Click **Customize | Entitlement Management | Entitlement Processes**

B. Click **New Entitlement Process**

C. Fill in the following information

    i. **Entitlement Process Name:** `Premium`

    ii. **Description:** `The premium entitlement process`

    iii. **Active:** `checked`

    iv. **Version Notes:** `Initial version`

D. Leave the advanced options as the default.

E. Click **Save**

8. Add the case milestones to the Premium entitlement process

A. Under the **Milestone** section, click **New**

B. Fill in the following information

    i. **Milestone Name:** `First Response`

    ii. **Trigger Time:** `60`

    iii. **Start Time:** `Entitlement Process`

    iv. **Milestone Business Hours:** `24x7`

    v. **Order:** `1`

    vi. **Criteria** is set to the following

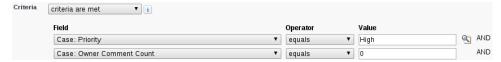| Criteria	criteria are met ▼	i		
Field		**Operator**	**Value**	
Case: Priority ▼		equals ▼	High	AND
Case: Owner Comment Count ▼		equals ▼	0	AND

C. Click **Save**

D. Repeat steps A-C for `Normal`

E. Under the **Milestone** section, click **New**

F. Fill in the following information

    i. **Milestone Name:** `Case Resolution`

    ii. **Trigger Time:** `1080`

    iii. **Start Time:** `Milestone Criteria`

    iv. **Order:** `3`

    v. **Criteria** is set to the following

Criteria	criteria are met ▼	i		
Field		**Operator**	**Value**	
Case: Priority ▼		equals ▼	High	AND

G. Repeat steps E-F for `Normal`

9. Create the Standard entitlement process

A. Click **Customize | Entitlement Management | Entitlement Processes**

B. Click **New Entitlement Process**

C. Fill in the following information
  i. **Entitlement Process Name:** `Standard`
  ii. **Description:** `The standard entitlement process`
  iii. **Active:** `checked`
  iv. **Version Notes:** `Initial version`
D. Leave the advanced options as the default.
E. Click **Save**

10. Add the case milestones to the Standard entitlement process
  A. Under the **Milestone** section, click **New**
  B. Fill in the following information
    i. **Milestone Name:** `First Response`
    ii. **Trigger Time:** `240`
    iii. **Start Time:** `Entitlement Process`
    iv. **Milestone Business Hours:** `<blank>`
    v. **Order:** `1`
    vi. **Criteria** is set to the following

  C. Click **Save**
  D. Repeat steps A-C for `Normal`
  E. Under the **Milestone** section, click **New**
  F. Fill in the following information
    i. **Milestone Name:** `Case Resolution`
    ii. **Trigger Time:** `2160`
    iii. **Start Time:** `Milestone Criteria`
    iv. **Order:** `3`
    v. **Criteria** is set to the following

  G. Repeat steps E-F for `Normal`

Exercise 4: Create milestone actions

Goal:

Create actions that occur when the case breaches it's SLA.

Scenario:

If a violation of the SLA occurs, then the case owners should be notified via email. If a high priority case breaches a new Task should be created for the SVP, Customer Service & Support to follow up on the case.
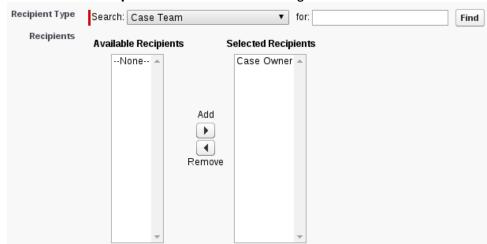
Tasks:

1. Create email alert
2. Create new task creation
3. Assign actions to milestones

Time:

10 minutes

Instructions:

1. Create email alert
    A. Click **Create | Workflow & Approvals | Email Alerts**
    B. Click **New Email Alert**
    C. Fill in the following information:
        i.   **Description:** `Breach notification`
        ii. **Unique Name:** `Breach_notification`
        iii. **Object:** `Case`
        iv. **Email Template:** `Support: Case has breached`
        v.   **Selected Recipients** is set to the following

        vi. **From Email Address:** `Current User's email address`
2. Create a new task
    A. Click **Create | Workflow & Approvals | Tasks**
    B. Click **New Task**

C. Select **Object:** `Case`
D. Click **Next**
E. Fill in the following information:
  i. **Assign To:** `SVP, Customer Service & Support`
  ii. **Subject:** `Reach out to customer`
  iii. **Unique Name:** `Reach_out_to_customer`
  iv. **Due Date:** `Rule Trigger Date plus 2 days`
  v. **Status:** `Not started`
  vi. **Priority:** `Normal`
F. Click **Save**

3. Add breach email notification to Premium milestones
   A. Click **Customize | Entitlement Management | Entitlement Processes**
   B. Click **Premium**
   C. Click **Premium**
   D. Click **First Response** for *High* priority
   E. Under *Violation Actions* click **Add Time Trigger**
   F. Choose **0 Minutes** *After First Response*
   G. Under the newly created *0 Minutes After* click **Add Workflow Action | Select Existing Action**
   H. Add the *Email Alert: Breach Notification and Task: Reach out to customer*
   I. Click **Save**
   J. Repeat B through H for all milestones. Remembering to not add the *Task* action for the *Normal* priority cases

4. Add breach email notification to Standard milestones
   A. Click **Customize | Entitlement Management | Entitlement Processes**
   B. Click **Standard**
   C. Click **Standard**
   D. Click **First Response** for *High* priority
   E. Under *Violation Actions* click **Add Time Trigger**
   F. Choose **0 Minutes** *After First Response*
   G. Under the newly created *0 Minutes After* click **Add Workflow Action | Select Existing Action**
   H. Add the *Email Alert: Breach Notification and Task: Reach out to customer*
   I. Click **Save**
   J. Repeat B through H for all milestones. Remembering to not add the *Task* action for the *Normal* priority cases

Exercise 5: Create Entitlements and Use Them

Goal:

Create entitlements for an account and create cases that use them

Scenario:

In order to start better supporting your accounts your company starts to sell support entitlements. These entitlements denote what type of support your customers get.

Tasks:

1. Create new entitlements
2. Open cases with those entitlements

Time:

10 minutes

Instructions:

3. Under an Account, create a new Premium Entitlement
   A. Locate the `Burlington Textiles Corp of America` Account
   B. Click **New Entitlement**
   C. Fill in the following information:
      i. **Entitlement Name:** `Premium Phone Support`
      ii. **Type:** `Phone Support`
      iii. **Start Date:** Today
      iv. **End Date:** A year from today
      v. **Entitlement Process:** `Premium`
   D. Click **Save**
4. Under a different Account, create a new Standard Entitlement
   A. Locate the GenePoint Account
   B. Click **New Entitlement**
   C. Fill in the following information:
      i. **Entitlement Name:** Standard Phone Support
      ii. **Type:** Phone Support
      iii. **Start Date:** Today
      iv. **End Date:** A year from today
      v. **Entitlement Process:** Standard
   D. Click **Save**
5. Open a Case for the Premium Entitlement
   A. Locate the Premium Phone Support Entitlement on the Burlington Textiles Corp of America Account
   B. Click **New Case**
   C. Fill in the following information:
      i. **Contact:** Jack Rogers
      ii. **Status:** New
      iii. **Priority:** High
      iv. **Case Origin:** Phone

     v. **Business Hours:** 9x5

D. Fill in the **Subject** and **Description** fields

E. Click **Save**

F. Notice that your two case milestones are now on the case. Write down the target date of the Case Resolution milestone

G. Click **Edit** and change the **business hours** field to `24x7`

H. Click **Save**

I. Notice that the target date of the Case Resolution milestone has changed

J. Add a new comment to the case and notice that the First Response milestone has disappeared.

NOTE: You cannot programmatically complete a milestone via clicks. To complete a milestone you have to do it with an Apex trigger. For our example it would be done on a Case Comment trigger.

6. Play around with the Standard Entitlement, business hours and priority of cases