Hands On Training By MVP: Build Entitlement Processes to Reach Your SLAs

Safe Harbor Statement

salesforce

Safe harbor statement under the Private Securities Litigation Reform Act of 1995:

This presentation may contain forward-looking statements that involve risks, uncertainties, and assumptions. If any such uncertainties materialize or if any of the assumptions proves incorrect, the results of salesforce.com, inc. could differ materially from the results expressed or implied by the forward-looking statements we make. All statements other than statements of historical fact could be deemed forward-looking, including any projections of product or service availability, subscriber growth, earnings, revenues, or other financial items and any statements regarding strategies or plans of management for future operations, statements of belief, any statements concerning new, planned, or upgraded services or technology developments and customer contracts or use of our services.

The risks and uncertainties referred to above include – but are not limited to – risks associated with developing and delivering new functionality for our service, new products and services, our new business model, our past operating losses, possible fluctuations in our operating results and rate of growth, interruptions or delays in our Web hosting, breach of our security measures, the outcome of any litigation, risks associated with completed and any possible mergers and acquisitions, the immature market in which we operate, our

relatively limited operating history, our ability to expand, retain, and motivate our employees and manage our growth, new releases of our service and successful customer deployment, our limited history reselling non-salesforce.com products, and utilization and selling to larger enterprise customers. Further information on potential factors that could affect the financial results of salesforce.com, inc. is included in our annual report on Form 10-K for the most recent fiscal year and in our quarterly report on Form 10-Q for the most recent fiscal quarter. These documents and others containing important disclosures are available on the SEC Filings section of the Investor Information section of our Web site.

Any unreleased services or features referenced in this or other presentations, press releases or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make the purchase decisions based upon features that are currently available. Salesforce.com, inc. assumes no obligation and does not intend to update these forward-looking statements.

Patrick Connelly

Red Hat
Salesforce MVP

CERTIFIED
FORCE.COM
DEVELOPER

Amber Boaz

CodeScience
Salesforce MVP

CERTIFIED
SALESFORCE
ADVANCED
ADMINISTRATOR

CERTIFIED
FORCE.COM
DEVELOPER

CERTIFIED
SALESFORCE
SERVICE CLOUD CONSULTANT

CERTIFIED
SALESFORCE
SALES CLOUD CONSULTANT

dreamforce

Agenda

- Introduction to SLAs
- Business Hours & Holidays
- Exercise 1: Create Business Hours and Holidays
- Entitlement Management
- Exercise 2: Enable Entitlement Management and Setup Case Page
- Entitlement Processes
- Exercise 3: Create Entitlement Processes and Milestones

- Milestone Actions
- Exercise 4: Create Milestone Actions
- Entitlements
- Exercise 5: Create Entitlements and Use Them
- Q & A

Username: admin@df15entitlementsMVP###.com

Password: entitlements2015

For ###: use the 3-digit number located on your computer.

Example:
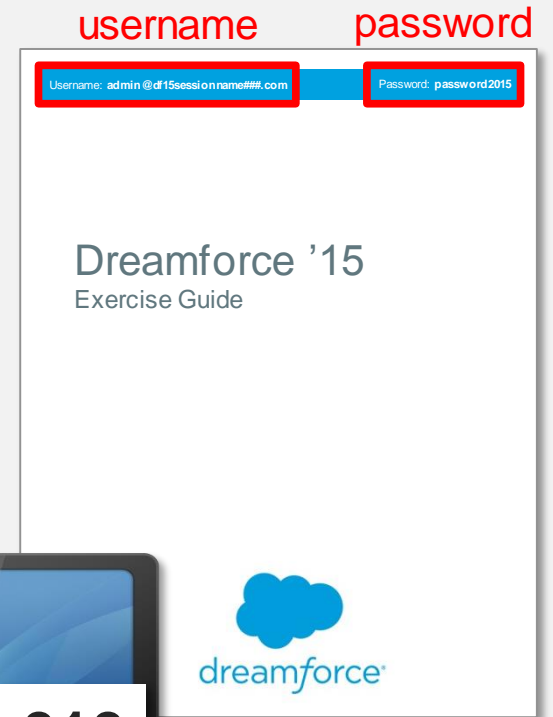
- Your computer number = 010
- Your username = admin@df15entitlementsMVP010.com

Org will be active for 30 days post Dreamforce

username   password

Username: admin@df15sessionname###.com   Password: password2015

Dreamforce '15
Exercise Guide

dreamforce

010

Introduction to SLAs

- Stands for Service Level Agreement
- Can be either public or private
- Can help drive up customer satisfaction

Business Hours and Holidays

Business Hours:

- Defines working hours
- Useful for geographically separated support centers
- Different than real-world hours

Holidays:

- Exceptions to normal business hours
- Completely optional

1: Create Business Hours and Holidays

salesforce
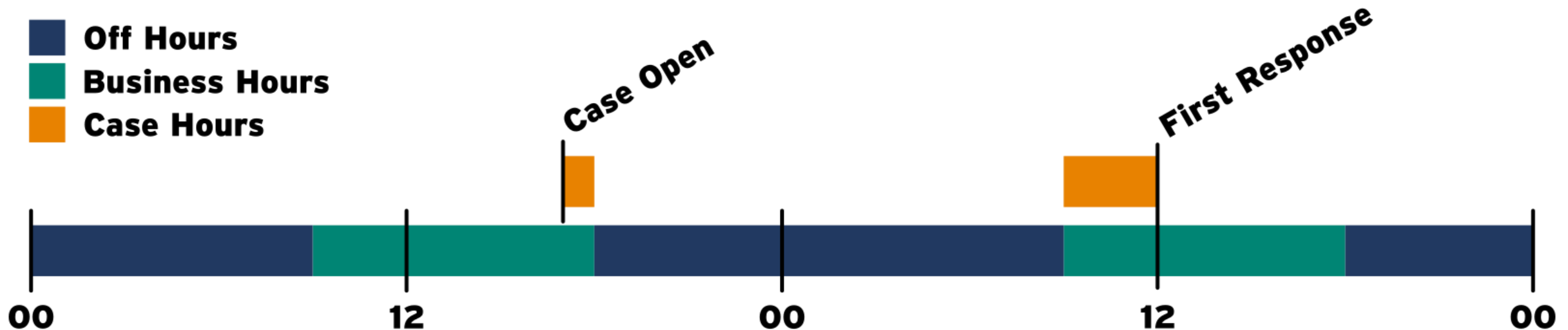
Scenario:

Time: 5 minutes

You are configuring your instance for a new support center. Your 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

Goal:

Create several custom business hours and a custom holiday

Tasks:

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

NOTE:

Fribsday is the most casual of holidays as prophesied by the ancient Mayans

Entitlement Management Settings

Enable or disable entitlement management. Click Save when you're done.

☑ Enable Entitlement Management

Entitlement Versioning

Entitlement versioning lets you make changes to existing entitlement processes.

☑ Enable Entitlement Versioning

Entitlements-Related Lookup Filters on Cases

Lookup filters help ensure data quality by limiting the items returned in lookup fields.

Asset Lookup - Limit to assets with:
- ☐ Same account on the case
- ☐ Same contact on the case
- ☐ Active entitlements on the case's account
- ☐ Active entitlements on the case's contact

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

Milestone Feed Items

Show feed items on cases for completed and violated milestones.

☐ Enable milestone feed items

Milestone Tracker

Let users view the business hours remaining until the next milestone.

☐ Show the time remaining in actual hours, not business hours

2: Enable Entitlement Management

salesforce

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.

Goal:

Enable entitlement management and add entitlement information to the case layout

Tasks:

1. Enable Entitlement Management
2. Configure Entitlement Management
3. Set Field Level Security for Entitlement related fields
4. Add fields to the case layout

Entitlement Processes

- Entitlement processes determine how your cases behave.

- Can be configured when to start and to exit.

- Can use the business hours of the case or specified hours.

3: Create Entitlement Processes and Milestones

salesforce

Scenario:

Time: 15 minutes

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

		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

Goal:

Create case milestones and entitlement processes

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

Milestone Actions

- Types of actions
  - New Task
  - New Email Alert
  - New Field Update
  - New Outbound Message
  - Select Existing Action
- Reusability is your friend

4: Create Milestone Actions

salesforce

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.

Goal:

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

Tasks:

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

The Entitlement object

ALERT: Once you've assigned an Entitlement Process and a Case is using it you cannot edit that version.

5: Create Entitlements and Use Them

salesforce

Scenario:

Time: 10 minutes

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.

Goal:

Create entitlements for an account and create cases that use them

Tasks:

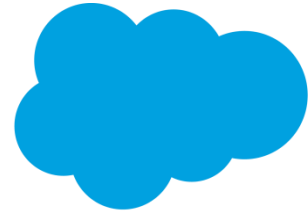1. Create new entitlements
2. Open cases with those entitlements

Provide Your Feedback with Our Session Survey

Q+A

Thank You