

Meet your service goals with SLAs and entitlements

Give service reps the info they
need to deliver great service with
Microsoft Dynamics CRM



for Service
Managers

give your service team the right info at the right time

In Microsoft Dynamics CRM, service level agreements (SLAs) and entitlements help you clearly define the service levels and terms for your customers.

Then, when your service reps are working with a customer, they can see right away what type of service that customer is eligible for, and they can ensure that the customers get the best service possible.

Note: If your organization is brand new to Microsoft Dynamics CRM, you get these customer service features automatically. Existing organizations get these features when they apply product updates. For details about product updates, [take a look at this article](#).



measure how your team is doing

SLAs let you clearly define various metrics (also known as key performance indicators or KPIs) to measure the performance of your service team.

For example, you can set conditions to have your service reps:

- Resolve high priority cases for premium customers within 1 day
- Resolve cases with normal priority in 3 days

To help service reps monitor how they're doing as they work on their cases, you can define what actions to take when a deadline for KPIs is nearing (called "warning actions"), or when a service rep doesn't meet the goal (called "failure actions").



help your team resolve cases on time

While they work with a customer, service reps can see at a glance if the customer is entitled to support for the product or service they purchased.

With SLAs and a countdown timer, service reps can see how much time they have to resolve their cases, and know which ones to tackle first.



pause the KPI countdown

When your service reps are waiting for information, give them a way to stop the SLA clock.

Do this by setting up the SLA to pause when cases are set to specific statuses like "On Hold" or "Waiting for Details". You can define these statuses in **Settings > Service Management > Service Configuration Settings**.

This way, whenever the case is set to one of the on-hold statuses, the SLA timer stops temporarily.

The screenshot shows the 'System Settings' window for Microsoft Dynamics CRM. The 'Disable SLAs' section has the 'No' radio button selected. The 'Select On Hold Case Status' section has a list of 'Available Values' (In Progress, Researching) and a 'Selected Values' list (On Hold, Waiting for Details). The 'Selected Values' list is highlighted with an orange box. An orange arrow points from this box to a larger, zoomed-in view of the 'Selected Values' list below.

This is a zoomed-in view of the 'Selected Values' list from the previous screenshot. It shows two items: 'On Hold' and 'Waiting for Details', each with a green arrow icon to its left. The entire list is enclosed in an orange border.

Note: The pause and resume feature is supported only with enhanced SLAs that are available if you've installed the CRM Online 2015 Update. For CRM on-premises organizations, enhanced SLAs are available if you've updated to CRM 2015.



define the amount of support allowed based on what a customer buys

Based on what your customers purchase, you can create entitlements to define how much support your customers are eligible for.

When a customer calls, the service rep sees:

- If the customer is eligible for support
- If the customer has any support left
- Whether the channel (for example, email or phone call) the customer used to contact the service team is supported under the entitlement

And, because service reps know when entitlements are running out, you may be able to improve service revenue by training service reps to let your customers know when it's time to renew.



speed up customer service with default entitlements

In the latest version of CRM Online 2015 Update 1, service teams can set an entitlement as the default entitlement for a customer. When an agent creates a case, the default entitlement is automatically associated with the case, saving time for the agent.

In cases where entitlement terms are incorrectly deducted (a faulty part is installed, for example), service agents can also credit back entitlement terms so the customer isn't charged.



let's look at an example

Contoso, a consumer electronics company, sells 3D printers.

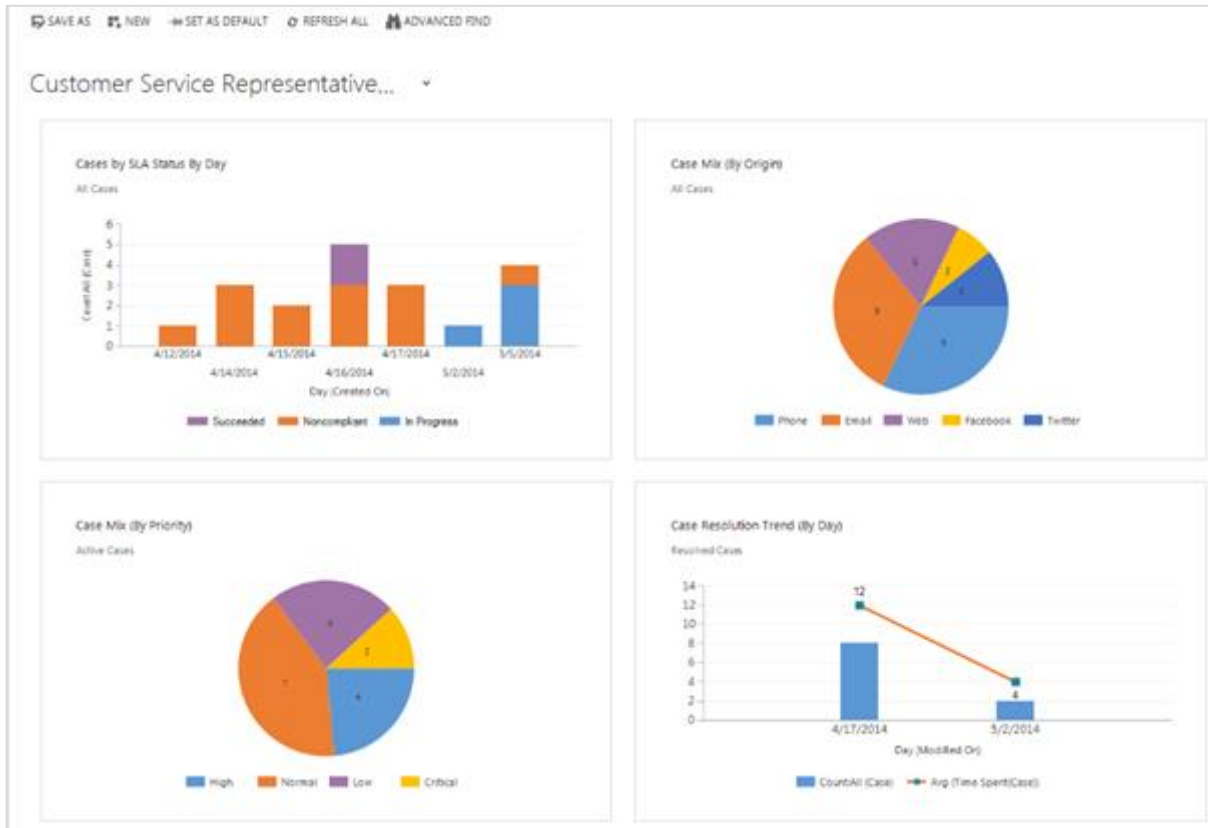
Using entitlements, they offer amounts of support like this:

- Premium customers who buy three printers are eligible for 200 cases per month. Cases can come from phone calls, email, Facebook posts, and Twitter.
- Standard customers who buy one printer are eligible for 100 cases per month. 50 of these cases can come from phone calls, and 50 from email. None can come from social media sources.

As they handle cases, Contoso service reps see immediately if they're working with a premium or standard customer, where the case came from, and how many cases are left.



track your team's progress on the dashboard



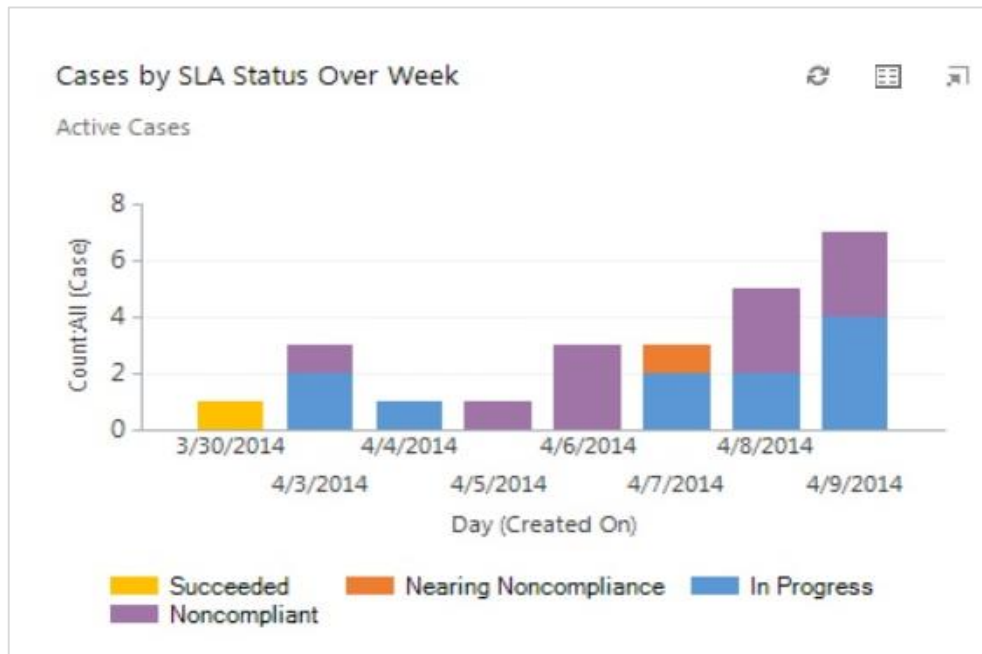
You can keep track of how your service team is doing by taking a look at your dashboard, which includes charts and graphs that give you a quick snapshot of key performance metrics.

Keep tabs on things like how many active cases your team is working on, and how they're doing meeting their service goals.

To get to the dashboard, from the nave bar go to **Service** > **Dashboards**.



see how many cases are running out of time



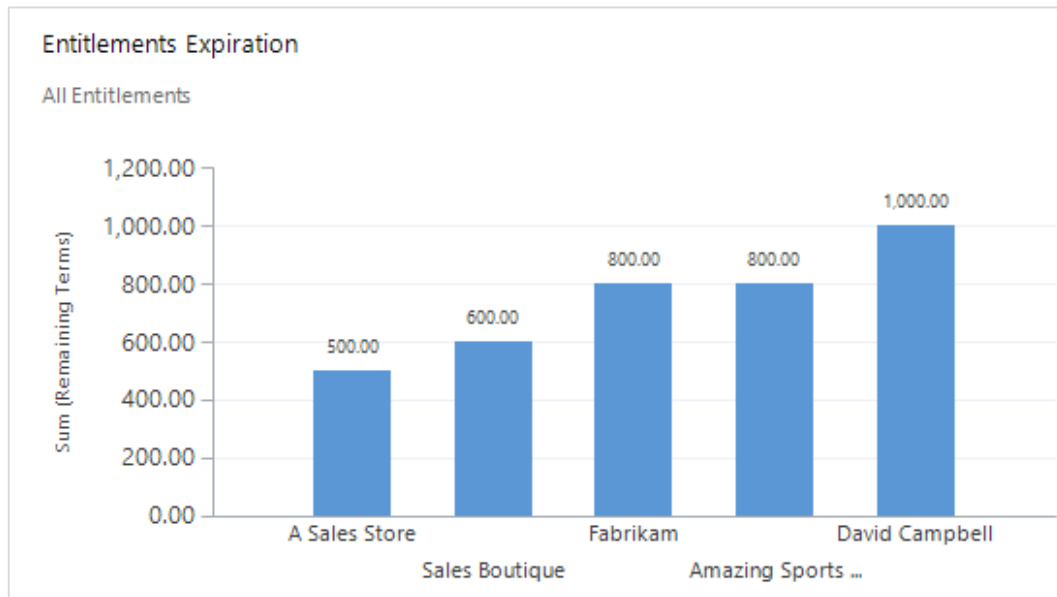
Here's an example of a chart that shows you how many cases are getting close to their SLA deadline.

You can also see how many cases were resolved on time, how many your agents are working on, and for how many cases the SLA deadline wasn't met.

This chart is called **Cases by SLA Status Over Week**.



know whose entitlements are expiring



You can also keep track of your customers' entitlements on your dashboard.

The **Entitlements Expiration** chart shows you the number of cases or number of hours of support remaining for a customer.

Use it to get an idea about the customers whose entitlements are expiring, so you can get in touch with them to renew their entitlements.



how to set up an SLA

You're probably ready to set up your own SLA.
Let's take a look at an example.

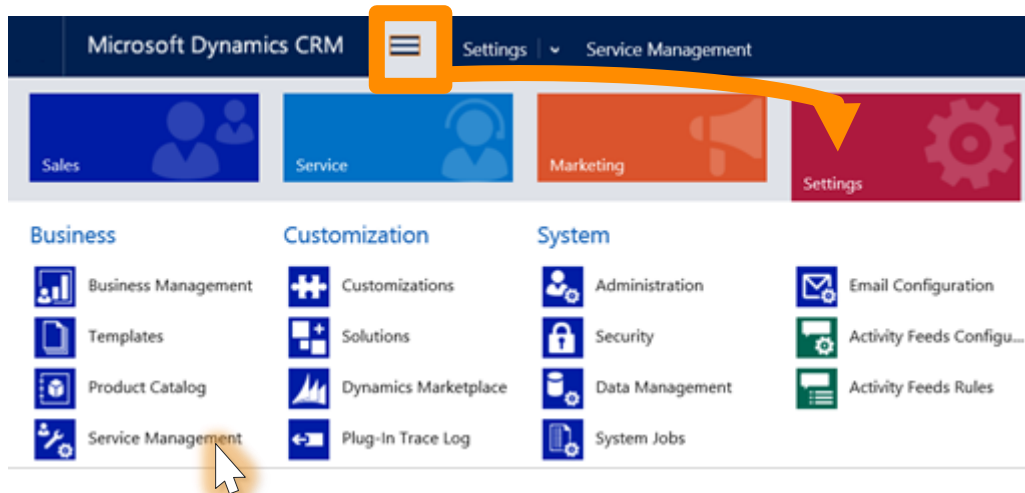


go to SLAs

You'll find SLAs under **Settings**, in the **Service Management** area.

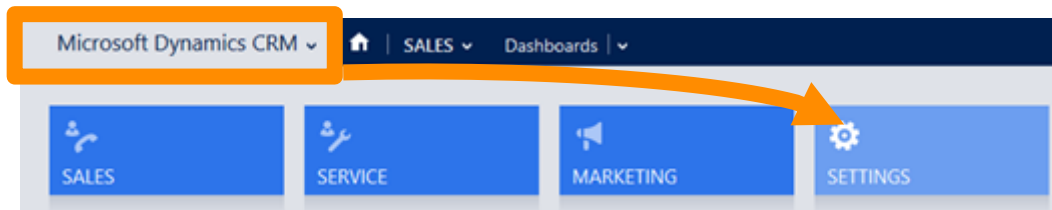
If your screen looks like this (latest version):

On the nav bar, choose **Settings**, go to **Service Management**. Choose **Service Level Agreements**.



If your screen looks like this (older versions):

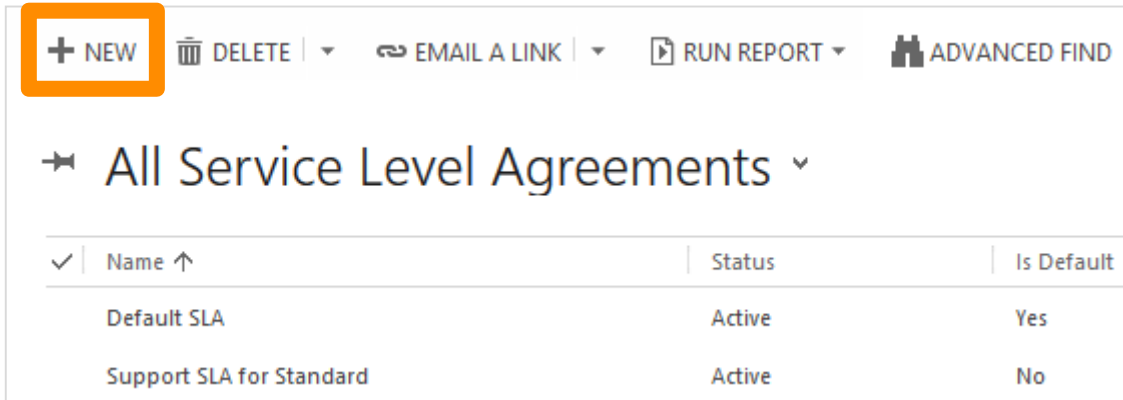
Choose **Microsoft Dynamics CRM** > **Settings** > **Service Management**. Choose **Service Level Agreements**.



create a new SLA

First, you'll create a new SLA. Choose **New**.

(**Tip:** You can also edit an existing one by clicking the name in the list.)



+ NEW | DELETE | EMAIL A LINK | RUN REPORT | ADVANCED FIND

→ All Service Level Agreements ▾

✓ Name ↑	Status	Is Default
Default SLA	Active	Yes
Support SLA for Standard	Active	No



fill in some details about the SLA

SAVE SAVE & CLOSE + NEW

SLA

New SLA

General

Name *	Premium/corporate customers
Applicable From *	Created On
Business Hours	APAC 8:00 am - 5:00 pm
SLA Type *	Enhanced
Allow Pause and Resume *	Allow
Description	SLA for customers of premium/corporate category resolution: hi-pri cases in a day

Here are a couple of tips:

In the **Applicable From** field, select the event that triggers the start time for the SLA metrics. You can choose to begin measuring from the time a case is created, changed, resolved, or escalated.

Use the **Business Hours** field to ensure that the correct hours are considered for calculating the SLA timelines.

In the **SLA Type** field, select **Enhanced** so you can set up the SLA to pause based on certain case statuses.

After you're done adding the details, click **Save** at the top of the screen.



add the KPIs you want to measure

You can track your service levels based on key performance indicators (KPIs) like:

- Case resolution time
- Follow up time
- Time allotted to first respond to the customer

SLA Details

↓ ↑ **+**

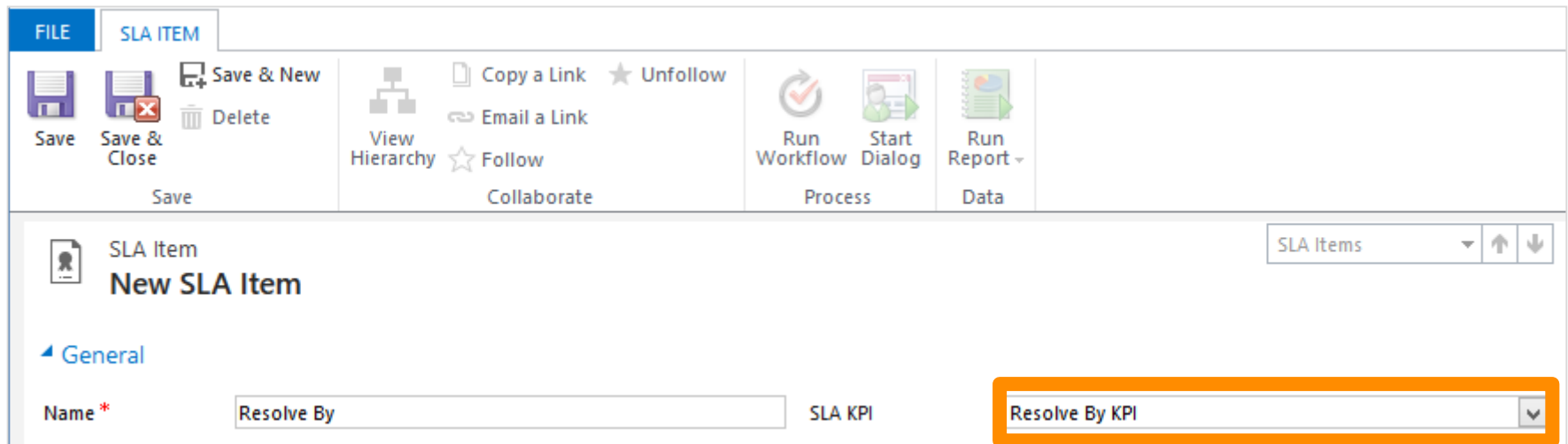
Name	Warn After	Failure After	SLA KPI Field	Created On	Modified On
No SLA Item records found.					

First, choose the **Add** button **+** to add the KPIs.



select what you want to track

You need to choose which KPI you want to use to evaluate SLA success. In this example, we'll select **Resolve By KPI** to track if cases are being resolved in a timely manner.



The screenshot shows the 'New SLA Item' form in a software application. The form has a ribbon-style interface with the following sections:

- FILE** (blue tab) and **SLA ITEM** (white tab)
- Save** group: Save, Save & Close, Save & New, Delete
- Collaborate** group: View Hierarchy, Copy a Link, Email a Link, Follow, Unfollow
- Process** group: Run Workflow, Start Dialog
- Data** group: Run Report

The main form area is titled 'New SLA Item' and has a 'General' tab selected. The 'Name' field contains 'Resolve By' and the 'SLA KPI' dropdown menu is set to 'Resolve By KPI', which is highlighted with an orange border. The 'SLA Items' dropdown menu is also visible in the top right corner.



set which types of cases the SLA applies to

Next, add conditions if you want to apply the SLA only to certain types of cases.

In this example, we'll apply the SLA to **Premium** or **Corporate** customers where the case priority is **High**.

Applicable When

Clear | Group AND | Group OR

AND	OR	Customer (Account)	Category	Equals	Premium
		Customer (Account)	Category	Equals	Corporate
	Case	Priority	Equals	High	

Select

Tip:

You can add more than one condition:

- Group with OR if you want the SLA to apply when at least one of the conditions is met.
- Group with AND if you want the SLA to apply when all conditions are met.



set the goal of the SLA

Then determine the end goal you want your service reps to achieve. In our example, the end goal is that cases are resolved on time.

Success Criteria

Clear | Group AND | Group OR

▼	<u>Case</u>	<u>Status</u>	<u>Equals</u>	<u>Resolved</u>
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[Select](#)

You may also want to do some actions when the success criteria is met. For example, send an email to your service team when they meet the resolution goals on time. To do this, add a success action.

Success Actions

Add Step ▼ | Delete this step.

•	Send email:	Create New Message ▼	Set Properties
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Note:

You can add success actions only for enhanced SLAs.



set how much time service reps have to meet the KPI

SLA Item Failure

Failure after: 1 day

Failure Actions

➡ Add Step | ✕ Delete this step.

- Update: Case [Set Properties]
- Create: Queue Item [Set Properties]
- Send email: Create New Message [Set Properties]

Set the amount of time in minutes, hours, or days.

Then define what happens if the SLA goal isn't met. For example, you could:

- Send email to stakeholders
- Update some case properties automatically
- Assign the case to another queue

In our example, we'll send an email.

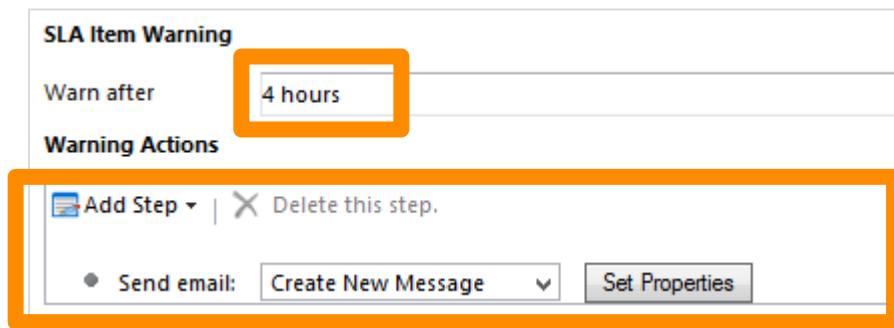
Note:

In our example, the number of days is calculated from the day the case is created because we selected **Created On** in the **Applicable From** field.



let service reps know when they're running out of time



In our example, we'll send a warning to the service rep 4 hours after the countdown starts.



SLA Item Warning

Warn after

Warning Actions

 Add Step ▾ |  Delete this step.

- Send email: ▾

Specify when to trigger the warning. In this case, it's 4 hours after case creation.

Then choose what happens next. You can choose actions like:

- Send email to the service rep
- Change some case properties automatically, like setting the SLA status to Nearing noncompliance

In our example, we'll send an email.



activate the SLA

NEW DELETE **ACTIVATE** **SET AS DEFAULT** ASSIGN EMAIL A LINK RUN REPORT

SLA
Premium/corporate customers

General

Name* Premium/corporate customers
Applicable From* Created On
Business Hours --
SLA Type* Enhanced
Allow Pause and Resume* Allow
Description SLAs for customers of premium/corporate category
resolution: hi-pri cases in 1 day

SLA Details

Name	Warn After	Failure After	SLA KPI Field
Resolve By (Premium)	4 hours	1 day	Resolve By KPI

When you're ready, click **Activate** so that the SLA calculations start on applicable cases.

You can choose **Set as Default** if you want to set the SLA as the default for your organization.



how to set up an entitlement

Your SLAs are now in place.

Now let's see how to set up an entitlement.

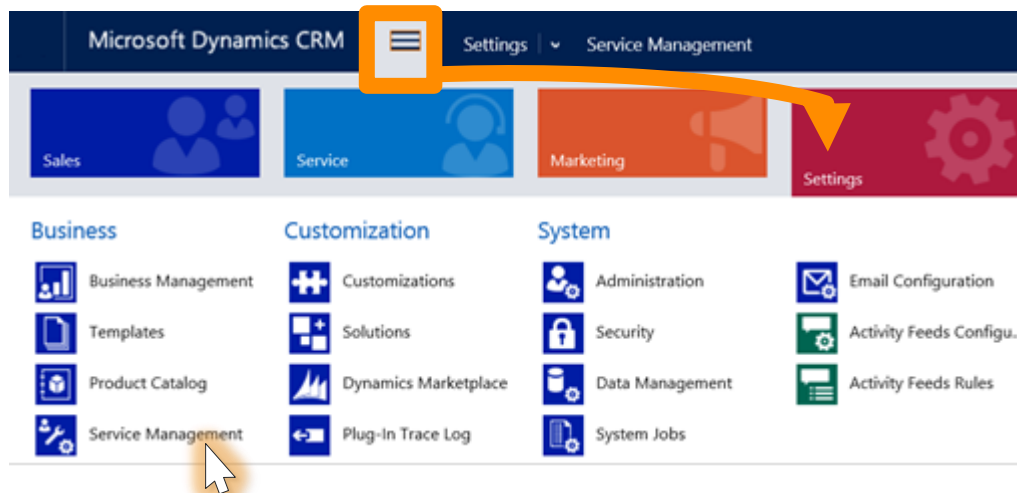


go to entitlements

You'll find entitlements under **Settings** in the **Service Management** area.

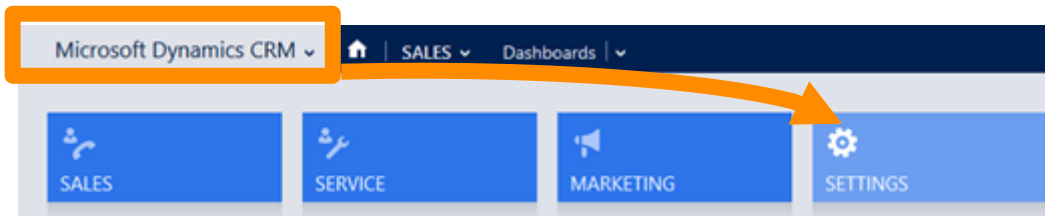
If your screen looks like this (latest version):

On the nav bar, choose **Settings**, go to **Service Management**. Choose **Entitlements**.



If your screen looks like this (older versions):

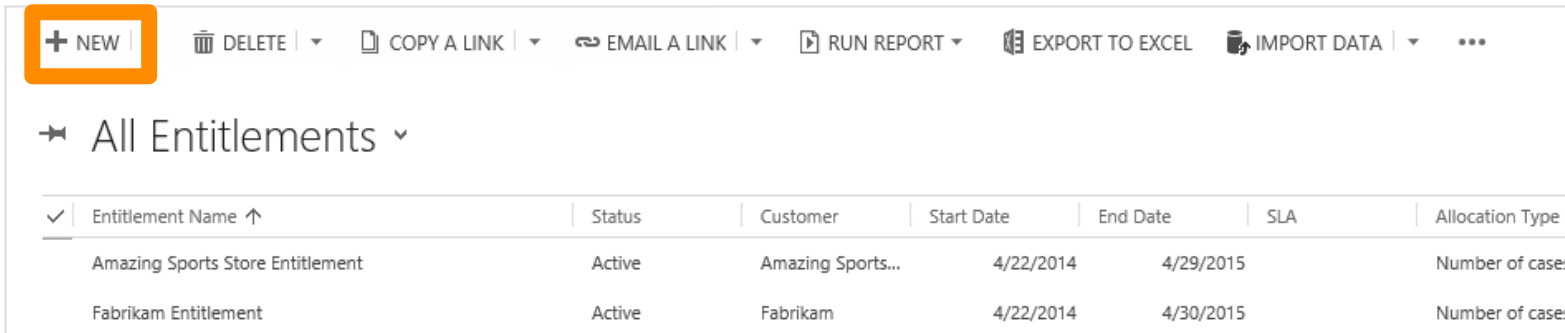
Choose **Microsoft Dynamics CRM** > **Settings** > **Service Management**. Choose **Entitlements**.



create a new entitlement

Choose **New**.

(**Tip:** Or click a name in the list to edit an existing one.)



The screenshot shows a user interface for managing entitlements. At the top, there is a toolbar with several actions: '+ NEW' (highlighted with an orange box), 'DELETE', 'COPY A LINK', 'EMAIL A LINK', 'RUN REPORT', 'EXPORT TO EXCEL', and 'IMPORT DATA'. Below the toolbar is a dropdown menu labeled 'All Entitlements'. Underneath is a table with the following columns: Entitlement Name, Status, Customer, Start Date, End Date, SLA, and Allocation Type. The table contains two rows of data.

✓ Entitlement Name ↑	Status	Customer	Start Date	End Date	SLA	Allocation Type
Amazing Sports Store Entitlement	Active	Amazing Sports...	4/22/2014	4/29/2015		Number of cases
Fabrikam Entitlement	Active	Fabrikam	4/22/2014	4/30/2015		Number of cases





fill in some details about the entitlement

ENTITLEMENT

New Entitlement

INFORMATION

Name *	Premium entitlement
Primary Customer *	 Lucern Publishing
Start Date *	12/1/2014
End Date *	11/30/2015
Restrict based on entitlement terms *	Yes
SLA	Premium/corporate customers
Owner *	 First name Last name
Description	--

Here are a couple of tips:

- Use the **Start Date** and **End Date** fields to select when the entitlement is valid.
- You can restrict service reps from creating cases for this customer if their entitlement terms are over.
- If you want to offer a specific level of service to the customer, select the SLA to use. Otherwise, the default SLA will apply.



track the amount of support to give

After you fill in the basic details, define the total amount of support you'd like to offer to the customer.

ENTITLEMENT TERMS

Allocation Type *	Number of cases
Decrease Remaining On *	Case Resolution
Total Terms	200.00
Remaining Terms	200.00

Choose how you want to calculate the amount of support; based on the number of cases, or the number of hours.






Choose whether the terms decrease when a case for the customer is created, or when a case is resolved.

In our example, the customer is allowed 200 cases, and hasn't used any yet.



add channels you'll provide support for

Email, phones, Facebook, and Twitter are considered “channels,” or sources for support cases. Choose the **Add** button **+** to add all the channels you want to offer support for, along with the amount.

ENTITLEMENT CHANNEL			
Name ↑	Total Terms	Remaining Ter...	
Email	70.00	 70.00	
Phone	70.00	 70.00	
Facebook	30.00	 30.00	
Twitter	30.00	 30.00	



select products and contacts entitled to receive support

If you want to offer support only for certain products, add them. You can also choose which customer contacts are entitled to receive support if only certain people are allowed.

PRODUCTS		
Product Name ↑	ID	Product Type
3D Computer-aided De...	3DSoftware	Sales Inventory
3D Printers	3DPrinters	Sales Inventory



Choose the **Add** button **+** to find and select the product and contact.

Note:

If you don't select a product or contact, the entitlement applies to *all* the customer's products and contacts.

CONTACTS		
Full Name	Email	Company Name
No Contact records found.		



activate the entitlement



When you're ready, click **Activate**.

+ NEW **✓ ACTIVATE** DELETE ASSIGN SHARE EMAIL A LINK

ENTITLEMENT

Premium entitlement

INFORMATION

Name *	Premium entitlement
Primary Customer *	 Lucern Publishing
Start Date *	12/1/2014
End Date *	11/30/2015
Restrict based on entitlement terms *	Yes
SLA	Premium/corporate customers
Owner *	 First name Last name
Description	--



set as default entitlement

+ NEW **SET AS DEFAULT** DEACTIVATE CANCEL ASSIGN

ENTITLEMENT
Standard

INFORMATION

Name *	Standard
Primary Customer *	Lucerne Publishing
Start Date *	3/17/2015
End Date *	3/18/2016
Restrict based on entitlement terms *	Yes
SLA	Support SLA for Corporate\Premum
Owner *	First Last
Description	--
Is Default *	<input type="checkbox"/>

If you on the latest version of CRM Online:

- After you active the entitlement, you can set it as the default entitlement for this customer.



what your service reps see

ACTIVE ENTITLEMENTS			+	☰
Entitlement Name ↑	Remaining Terms	Status		
Premium entitlement	1,000.00	Active		
Standard entitlement	500.00	Active		

When a service rep creates a case for a customer, they can see all the entitlements that the customer has.

CASE

Can't upload files

Identify (Active)

- ✓ Find Customer* Lucern Publishing
Find Contact [click to enter](#)
- ✓ Find Case Can't upload files

Summary

CASE DETAILS

Case Title*	Can't upload files
ID	CAS-00055-F2S1B1
Subject	--
Customer*	Lucern Publishing
Origin	--
Contact	--
Entitlement	Premium entitlement
Product	--

If they choose a specific entitlement, the SLA associated with the entitlement is applied. Otherwise, the default SLA is applied.



... what your service reps see

Enhanced SLA Details

First response in **3h 56m 55s**

Resolve in **23h 56m 55s**

Name ↑	Status	Failure Time	Warning Time	Succeeded On
First Response By KPI	In Progress	12/5/2014 5:12 AM	12/5/2014 3:12 AM	
Resolve By KPI	In Progress	12/6/2014 1:12 AM	12/5/2014 5:12 AM	

In the **Enhanced SLA Details** section, service reps can see the KPIs and the number of days and time they have to meet each KPI.

Priority: High

Created On: 11/24/2014 4:53 AM

Status: On Hold

Waiting for Detai

Researching

If a service rep changes a case status to one of the on-hold statuses, the SLA timer for the case pauses. The countdown resumes when the service rep moves the case to one of the active statuses.

Enhanced SLA Details

First response in **Paused**

Resolve in **Paused**

Name ↑	Status	Failure Time	Warning Time	Succeeded On
First Response By KPI	Paused	12/5/2014 5:12 AM	12/5/2014 3:12 AM	
Resolve By KPI	Paused	12/6/2014 1:12 AM	12/5/2014 5:12 AM	



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Version 7.1



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