



Dynamics 365 SLA & ARC Migration Playbook

Ensure optimal migration from Web Client to Unified Interface of Automatic Record Creation and Service Level Agreement Migration for Dynamics 365 Customer Service application Solution

FastTrack for Dynamics 365 Apps



Purpose and Scope





THE SITUATION

- Effective October 01, 2020, the service-level agreements (SLAs) and automatic record creation (ARCs) rules are deprecated in the web client.
- Microsoft will continue to provide support and critical security updates for these features in the web client until end of life, **October 01, 2022**
- The deprecation and end of life are not applicable to the feature in Dynamics 365 Customer Engagement (on-premises)

PURPOSE

ENSURE OPTIMAL MIGRATION FROM WEB CLIENT TO UNIFIED INTERFACE OF ARC AND SLA FOR DYNAMICS 365 CUSTOMER SERVICE APPLICATION

Audiences:

-  Customer Solution Architects
-  Partner Solution Architects
-  ISV
-  Microsoft FastTrack, Customer Success and Consulting teams

In summary, this guide will help you with:

- ✓ Understand need to migrate legacy SLA & ARC items
- ✓ Understand the strategy and migration process
- ✓ Understanding of tools that would ensure an optimal migration.
- ✓ Find the resource that will support the process

Chapter 1: Introduction



Announcements

As [announced](#) previously, legacy Automatic Create & Update(ARC), Service Level Agreements (SLA), SLA items and SLA KPIs are deprecated. These deprecated rules are only available through the Legacy Web Client administration experience and are not available for update through the Unified Interface administration experience. There is a [modern version](#) for this feature available with similar capabilities in Unified Interface.

How does this affect Customers?

As [mentioned](#), the legacy ARC, SLA, SLA items and SLA KPIs are deprecated and **end of support for this feature is currently October 2022**. It is recommended that you move to the [modern SLA & ARC feature](#) as soon as possible to avoid any **disruption in business**.

What do I need to do to prepare for this change?

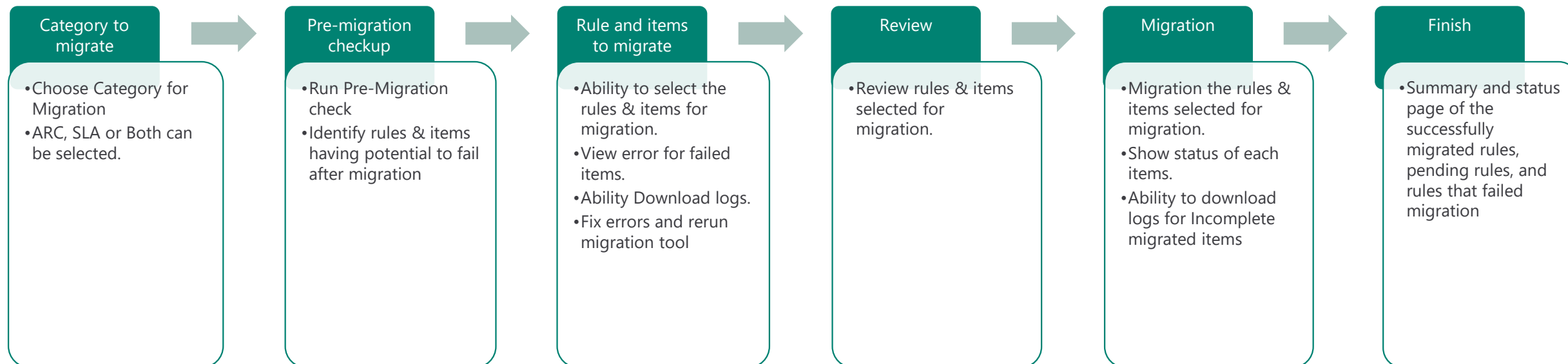
We have a migration tool available out of box in Customer Service which will help in migrating legacy ARC, SLA, SLA items and SLA KPIs to the corresponding modern experience.

SLA & ARC Migration Tool

Functionalities:

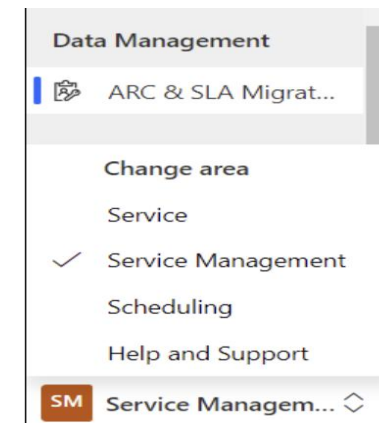
- Ability to run the migration tool multiple times and view the status at any point in time.
- Flexibility to choose the rules in the web client that need to be migrated.
- Messages on potential issues on why a rule failed the migration process.

Migration tool execution:



Accessing migration tool:

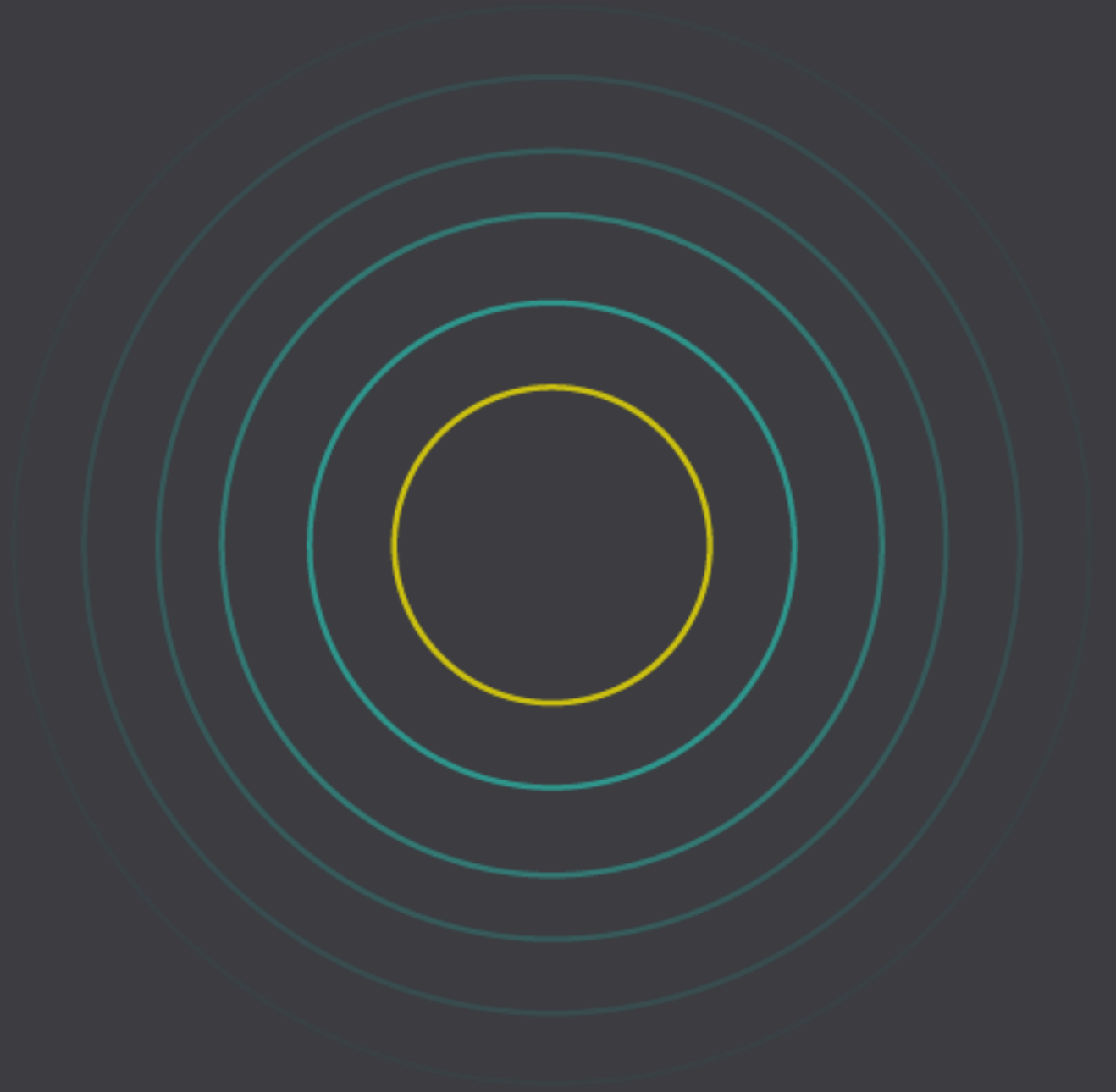
- In **Customer Service Hub**, select **Service Management** in Change area.
- Under **Data Management**, select **ARC & SLA Migration Tool**.



Legacy Feature	Comparison		Modern Feature
Condition Control in SLA item is not accessible compliant	×	✓	Condition Control in SLA item is accessible compliant
Uses Workflows for Actions	✓	✓+	Uses Power Automate flows for Actions
Pause configurations can be set only at Table Level	✓	✓+	Pause Configurations can be set at Table, KPI & SLA Item Level
Calendar is on SLA level	×	✓+	Calendar is on SLA item level
Cannot configure parallel KPIs	×	✓	Can configure parallel KPIs
Cannot configure SLA items with different applicable from	×	✓	Can configure SLA items with different Applicable From
Limited number of actions	✓	✓+	Actions are multiple (as power automate allows)
No Support for Custom Time Calculation & Recalculation	×	✓	Custom Time Calculation & Recalculation of Warning Time and Failure Time of SLA Enable custom calculation of SLA KPIs in Dynamics 365 Customer Service Microsoft Docs

Legacy Feature	Comparison		Modern Feature
Main grid & views	✓	✓	Main grid & views
Rules	✓	✓	Rules
Rules Items	✓	✓	Conditions to evaluate
Conditions	✓	✓	Condition builder
Actions <ul style="list-style-type: none"> Create table records 	✓	✓	Action to take <ul style="list-style-type: none"> Record to create
Specify other actions <ul style="list-style-type: none"> Create or update records Send Email Start child workflow 	✓	✓+	Configure actions in Power Automate <ul style="list-style-type: none"> Create or update records Send Email Trigger child Power Automate Leverage other Power Automates actions & connectors
Email: Send email using template	✓	✓	Email: Send email using template
Channel property <ul style="list-style-type: none"> Read & react to external data before evaluating rule 	✓	✓	Before evaluating condition, configure in Power Automate <ul style="list-style-type: none"> Read & react to and/or update external data before evaluating rule Leverage other Power Automates actions & connectors
Email: Requires Entitlements	✓	✓	Email: Before evaluating requires Entitlements
Always auto create contact for unknown sender if unknown sender is allowed.	✗	✓	Create contact automatically is optional when unknown sender is allowed Automatically create or update records in Customer Service Hub (Dynamics 365 Customer Service) Microsoft Docs

Chapter 2: Planning



Consideration for choosing Migrate vs. Create new SLA & ARC

Considerations for using Migration tool

- Custom columns created on SLA items will not be migrated.
- Standard SLA rules: Standard SLA rules have been deprecated and are no longer supported in Unified Interface and therefore aren't supported in the migration tool.



Migrate

Benefits

- Complete transition in less time
- Lower Effort
- Reduce error probability

Challenges

- Less space for optimization
- Requires testing & validation

Create New

Benefits

- Opportunity to optimize and leverage new features
- Low Risk and Business Impact

Challenges

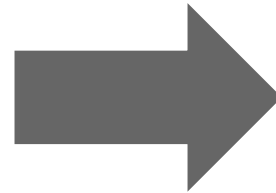
- More time consumption



Considerations

At this stage, you have reviewed existing implementation of ARC & SRC and understood about ARC & SLA Migration tools.

In this section, we will discuss some important considerations for successfully moving from Web Client SLA & ARC to Morden SLA & ARC



Step 1

Step 2

Step 3

Step 4

Step 1: Assess Impact

Review SLA & ARC implementation as part of implementation. Identify potential rules & items which can't be migrated using Migration tool.

To assess the right impact, consider the following when planning for a transition:

- Run Pre-Migration migration tool to identify potential issues.
- Assesses impact of dependent functionalities.
- Review any custom rule implemented to reset SLA and consider using out of the box Custom Time Calculation & recalculation capability.
- Identify customization used to apply SLA programmatically

Step 2: Define Scope

Since you have accessed the impact, define your migration scope & estimates considering following points:

- Estimate for new implementation vs Migration using tool
- Identify opportunities to optimize and leverage new features
- Estimate for updating the customizations which are using to apply SLA to use migrated SLA.
- Estimate for testing for both migrated & new implementation.
- Performance testing must be included in the scope
- Estimate time taken to analysis existing records in production where SLA is already applied and are active to ensure that new SLA are applied without any issue.

Step 1

Step 2

Step 3

Step 4

Step 3: ALM

Defining ALM strategy to deploy modern SLA & ARC from development environments to various test environments (i.e., end-to-end, SIT, UAT, etc.).

Consider below points while defining the ALM strategy:

- Perform migration or create new SLA & ARC in lower environment
- Promote migrated SLA & ARC to higher environments using solution
- Running Migration tool on Test and production environments must be avoided.

Step 4: Testing

Testing the migration to Modern SLA & ARC is essential to the success of its implementation. It is recommended to create a test strategy in the planning phase. Ideally, the test strategy will provide the blueprint for the approach to testing and includes the high-level overview of the plan that will be followed to support the validation of the transition.

The transition test strategy should include:

- High-level overview of the plan
- Different test types required for the migration (i.e., end-to-end, SIT, UAT, etc.)
- Testing of end-to-end scenarios must be planned
- Performance testing must be planned

Chapter 3: MIGRATION



At this stage, you understand how migration tools works and have identified the ARC & SLA which needs to be migrated using migration tools vs which needs to be created new.

For the ARC & SLA which needs to be migrated using tool, run Pre-migration check and review potential errors highlighted by the tool for those items & rules.

Potential Pre-migration issues:

- **Under or not-under condition for lookup attribute**

The screenshot shows the 'Applicable When' configuration window. It has a toolbar with 'Clear', 'Group AND', and 'Group OR'. Below is a table with columns for 'Case', 'Subject', and 'Default Subject'. The 'Subject' column has a dropdown menu open, showing 'Under' selected and highlighted with an orange box. The 'Default Subject' column shows 'Default Subject'.

Action needed:

- Under and not-under operators are not supported in Unified Interface, and therefore are not supported in the migration tool.
- Any conditions that have under or not-under operators are translated as related entities after migration and are shown as blank in Unified Interface after migration and cannot be edited.
- Consider adding customization to update the required details on parent table & update conditions accordingly

- **Not on Date type operator**

The screenshot shows the 'Applicable When' configuration window. It has a toolbar with 'Clear', 'Group AND', and 'Group OR'. Below is a table with columns for 'Case', 'Created On', 'Not On', and '7/15/2020'. The 'Not On' column has a dropdown menu open, showing 'Not On' selected and highlighted with a red box. The '7/15/2020' column shows the date.

Action needed:

- Not on operator for the Date data type is not supported in Unified Interface and therefore is not supported as part of migration.
- Update condition using less than and greater than clause before migration



Post migration activate migrated rules:

Post migration both migrated modern ARC & SLA will be in inactive state. So, it needs to be activated post migration.

SLA: Deactivate Legacy SLA rule after activating migrated SLA rules.

ARC: Legacy rule will be automatically deactivated after activating migrated ARC rules.

ALM



Testing Considerations:

End-to-end business flow must be validated post deployment on test environments considering below scenarios but not limited to:

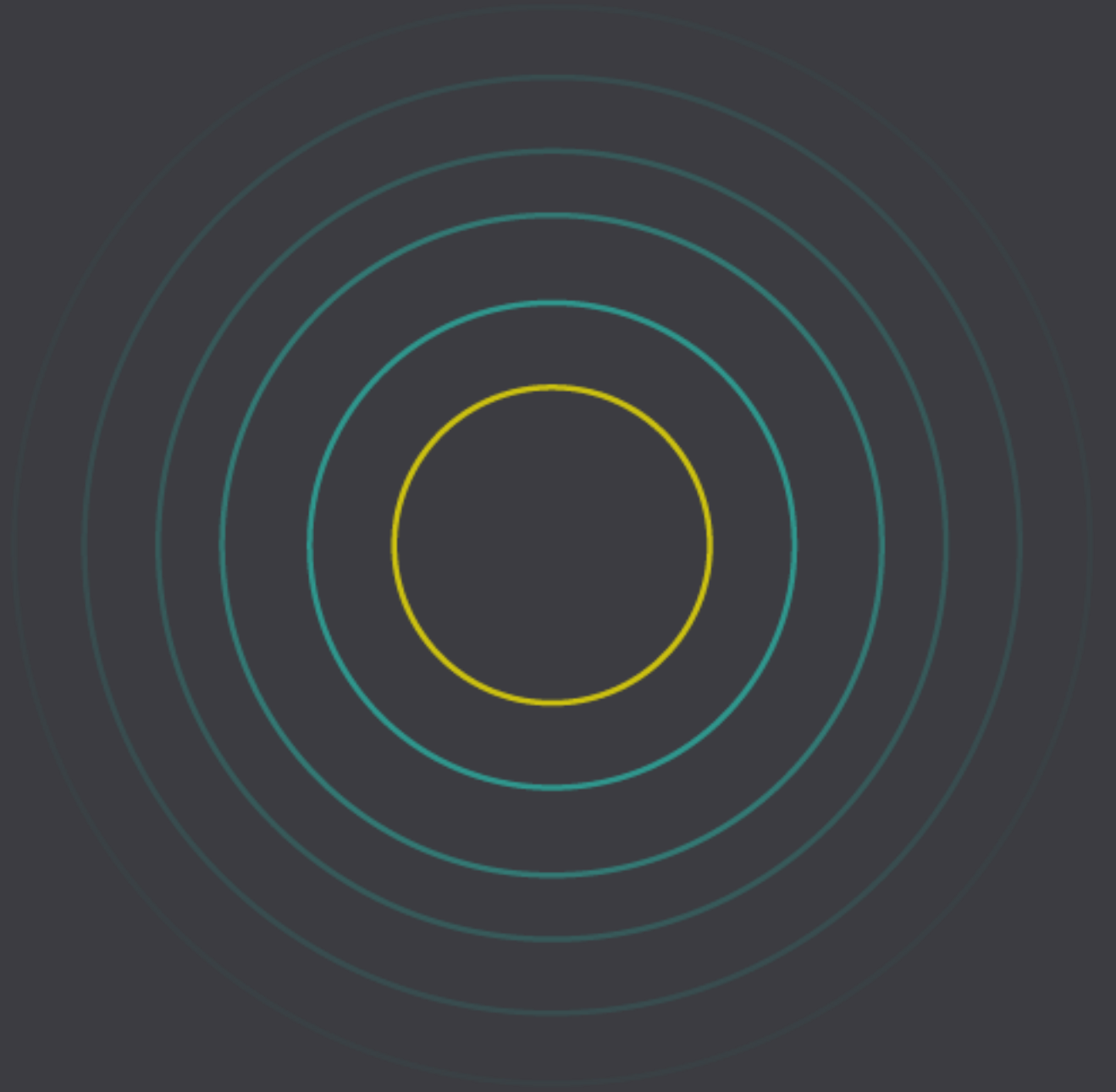
SLA

- ✓ Pause / resume SLA at table level
- ✓ Applying new SLA post migration on the existing record where legacy SLA was applied.
- ✓ Switching from Legacy SLAitem(SLAitem1) to Modern SLA item(SLAitem1)
- ✓ Recalculation after terminal state evaluation of Legacy SLA
- ✓ Validation of every Actions (for e.g. to make sure Email has been sent on Failure of SLA)

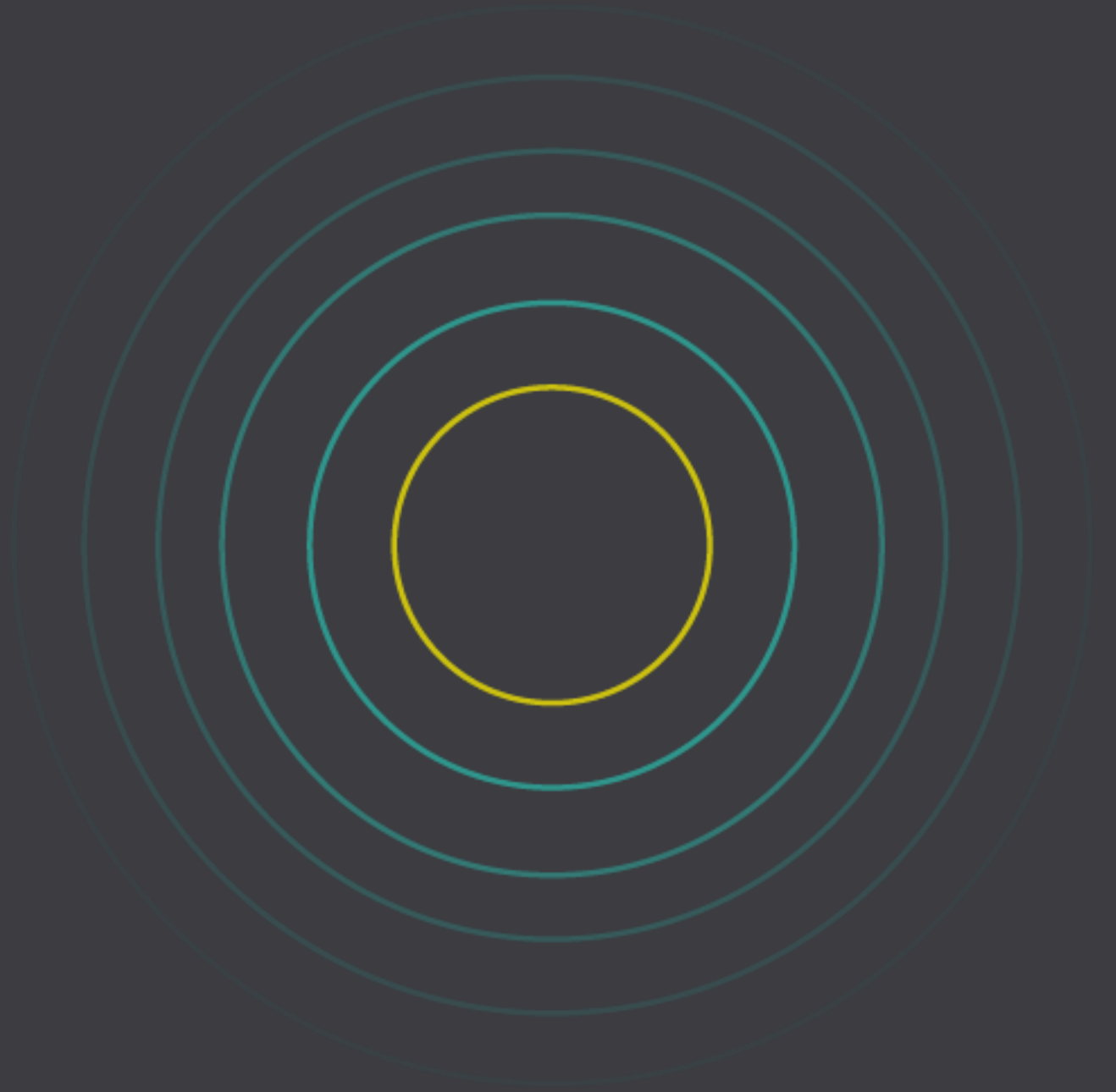
ARC

- ✓ Correct rule item is being selected
- ✓ Case creation with all the expected fields and data
- ✓ Email regarding is set
- ✓ Auto response is sent (optional)

Appendix



FAQ



💡 What will be the experience post Oct 2022?

Post October 2022, Legacy SLAs & ARC will continue to work as it as. However, Microsoft will not provide any support.

Legacy SLAs will be accessible until Web Client is supported.

Legacy SLAs & SLA can be viewed in UCI. However, they cannot be edited. Also, the item details are also not available in UCI

💡 Will customers be able to create new legacy SLAs post Oct 2022?

If legacy web client is accessible. Yes, however we strongly recommend customers not to use legacy SLAs & ARC as it's going out of support

💡 Will modern ARC & SLA consume from my Power Automate flow entitlement?

No, Modern SLA & ARC Power Automate are whitelisted and will not count against your entitlement

💡 What will happen to the previous running workflows for legacy SLA once Modern SLA condition is met post migration

Previous running workflows for legacy SLA will be cancelled and UCI Modern flow will start monitoring the new SLA KPIs

💡 How can I promote my SLA migration through environments?

There are 2 options

Option 1 – Recommended

- Use migration tool on your dev/source environment
- Validate modern SLA & ARC works as expected
- Export new Modern SLAs & ARC from dev to target environment (solution promotion)
- Manually deactivate legacy SLAs & ARC in target environment
- Activate new Modern SLAs & ARC

Option 2

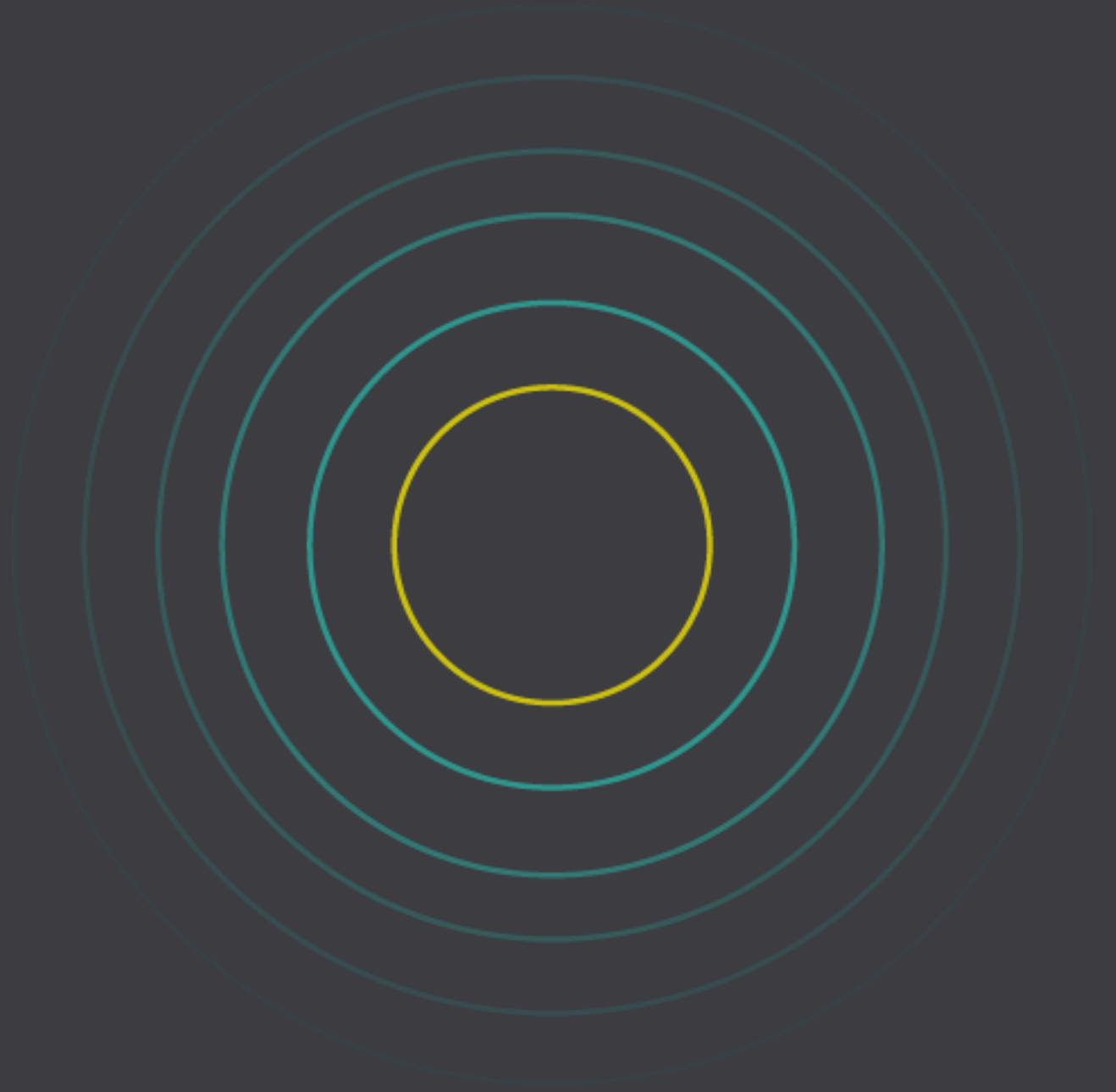
- Run the migration tool on your dev environment
- Validate modern SLA works as expected
- Plan running the migration tool on rest of your environments

Note: Deactivating legacy SLAs will not impact running legacy SLA instances and should keep running till SLA KPIs reach terminal state

Note Do NOT delete legacy SLAs



Case Study



Long Running SLAs

Scenario:

A Financial Services Company is using SLAs extensively. SLAs are configured case table and can span over 180 DAYS, 260 DAYS etc.

Once case is created & SLA is applied, system jobs will be created & scheduled for months down the line which might be after Oct 2022

For example, a case created on 3/31 with a 260 day SLA will have a system job created today that is scheduled to get executed after 12/10.

Recommended Steps:

1. Perform Migration using Migration tool
2. Turn off (deactivate) legacy SLA
3. Enable Modern SLA
4. Evaluate if you need to terminate existing Legacy SLA instances.

Note: Existing running SLA instances will continue to run till they reach terminal state

5. Validate impacted business functionalities

Known Gaps/Limitation



Known Gaps and Limitations

- Under/Not Under operator in modern SLA & ARC designer
- Related entities not available in modern SLA & ARC designer
- Doesn't support multiple items or conditions having the same "applicable when" within same SLA for same KPI
- UX parity gaps for SLA designer

Key Sites and Resources

- ❑ [Migrate automatic record creation rules and service-level agreements | Microsoft Docs](#)
- ❑ [Automatically create or update records in Customer Service Hub \(Dynamics 365 Customer Service\) | Microsoft Docs](#)
- ❑ [Deprecations in Dynamics 365 Customer Service | Microsoft Docs](#)
- ❑ [Enable custom calculation of SLA KPIs in Dynamics 365 Customer Service | Microsoft Docs](#)



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