P16: SLA Configuration

Friday, August 15, 2025 10:12 AM

Context

Item	Detail
Tag	Vertical Patterns | D365
Contributors	Vincent Kimiti
Version Control	V1.0
Application Use Case	Configures SLAs to ensure timely resolution of customer support tickets, driving service excellence.
Reference Usage	Used to track and ensure the timely resolution within predefined SLAs.

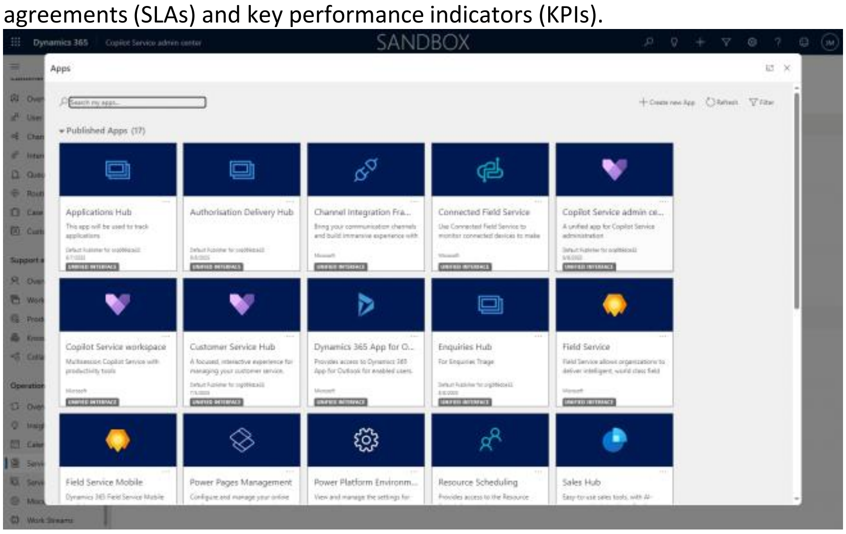
Story Behind The Pattern

Item	Detail
The Problem	Teams need to be promptly notified of form submissions to avoid delays in follow-up actions and ensure efficient response times.
The Solution	Create a workflow to automatically update the record status and trigger the next steps when a form submission meets specific SLA conditions
Dependencies	• Power Apps or Dynamics 365 environment • Predefined SLA conditions and KPIs tied to the case or process being tracked

Step-by-Step Guide to Enabling SLA Configuration

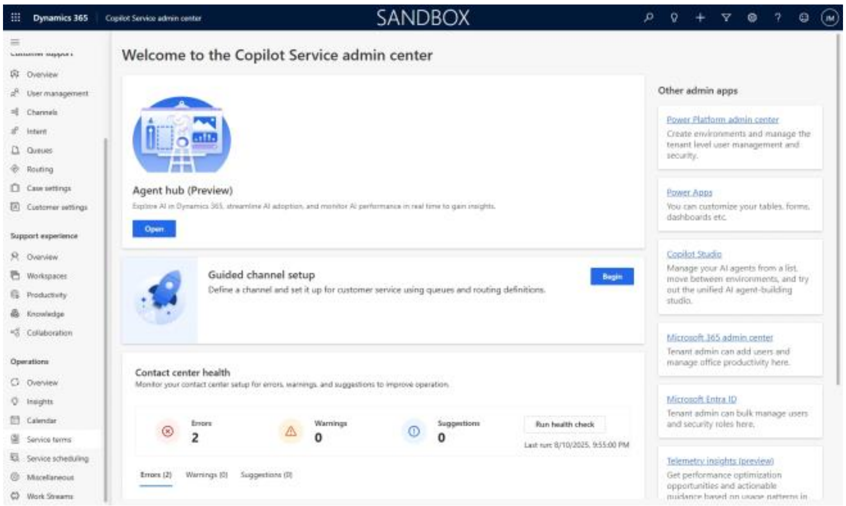
1. **Access the Copilot Service Admin Center:**

- Begin by navigating to the **Copilot Service Admin Center** in your system dashboard. This is where you will configure your service level agreements (SLAs) and key performance indicators (KPIs).



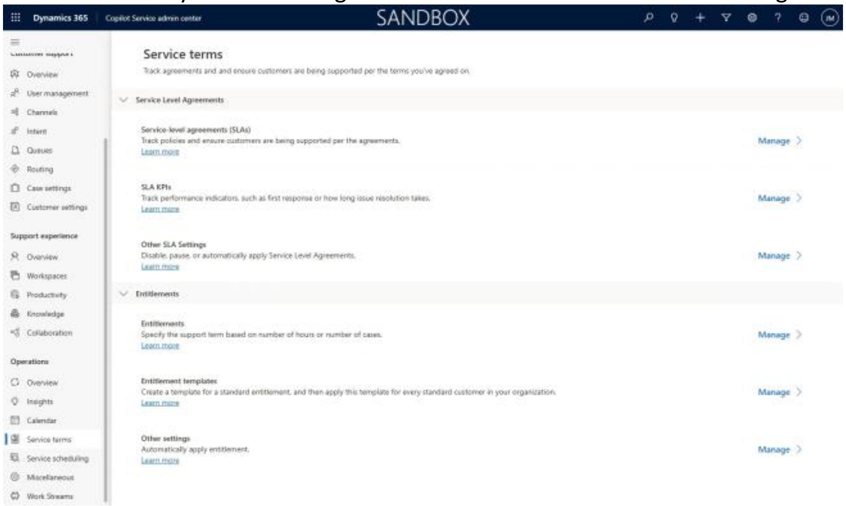
2. **Select Service Terms:**

- In the Copilot Service Admin Center, find and click on **Service Terms**. This will take you to the section where you manage various SLAs, including their KPIs.



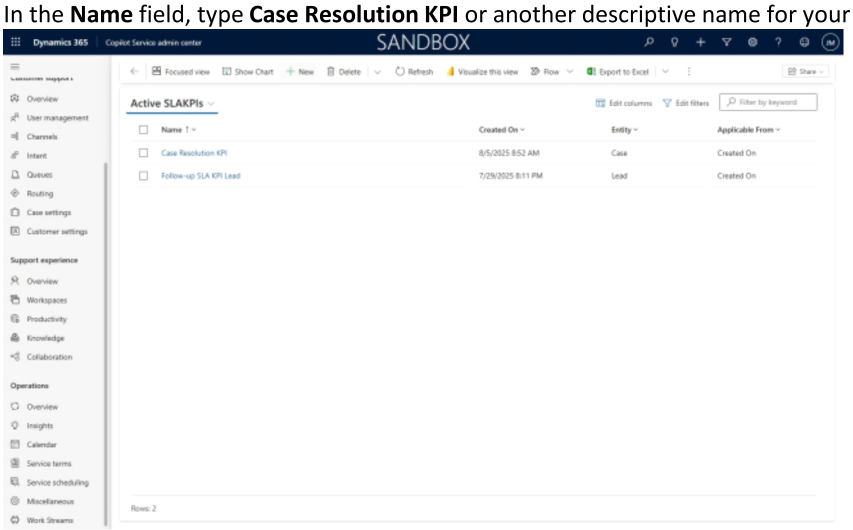
3. **Manage SLA KPIs:**

- On the page showing the SLA KPIs, click the **Manage** button. This will allow you to add or edit the KPIs that are associated with your SLAs. Make sure you are working with the correct KPI section for this configuration.



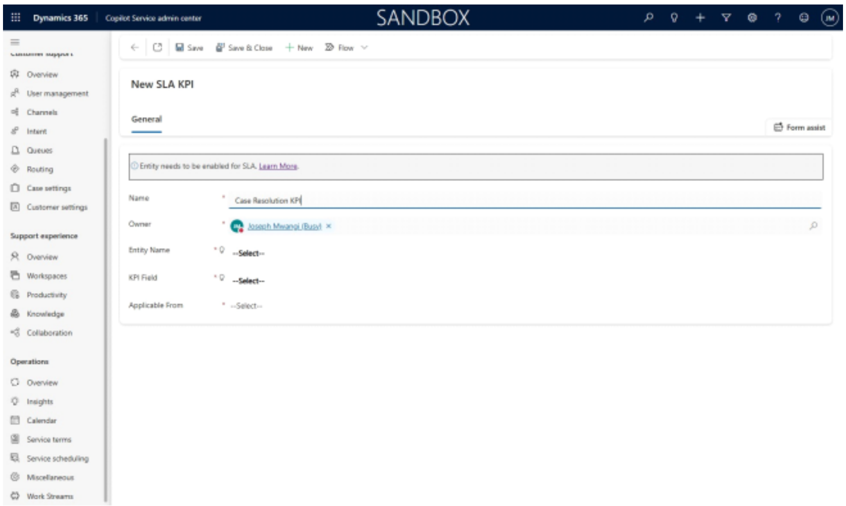
4. **Create a New KPI:**

- Next, click the **New** button to create a new KPI. This is where you will define the performance metric you want to track.
- In the **Name** field, type **Case Resolution KPI** or another descriptive name for your KPI.



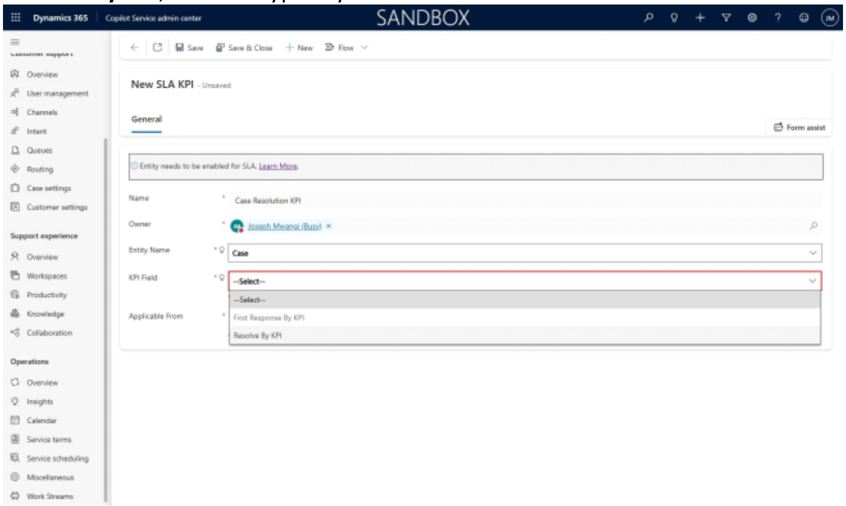
5. **Associate the Correct Entity:**

- After naming your KPI, click on the **Entity Name** dropdown to select the entity associated with this KPI. This is where you link the KPI to the relevant business process.
- For this configuration, click on **Case** to associate the KPI with the case management process.



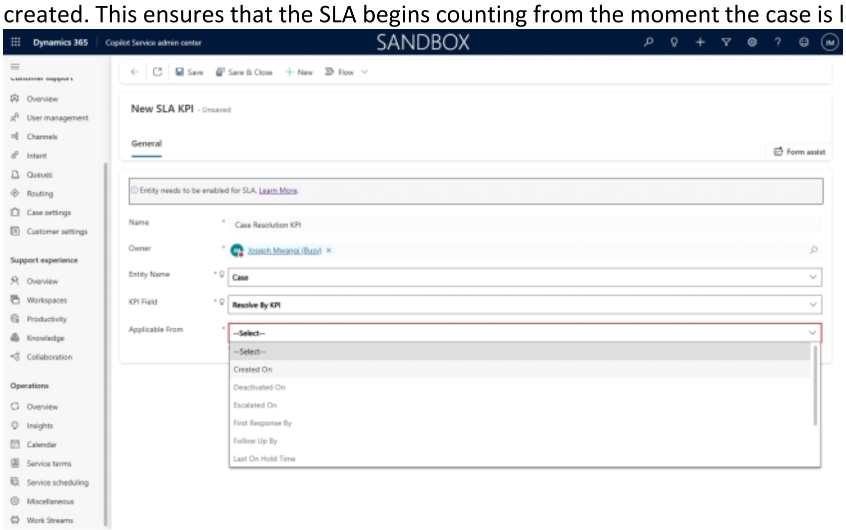
6. **Select the KPI Field:**

- In the **KPI Field** section, click on the field dropdown and select the appropriate field that will measure this KPI. In this case, choose **Resolve By KPI**, which is typically used for case resolution metrics.



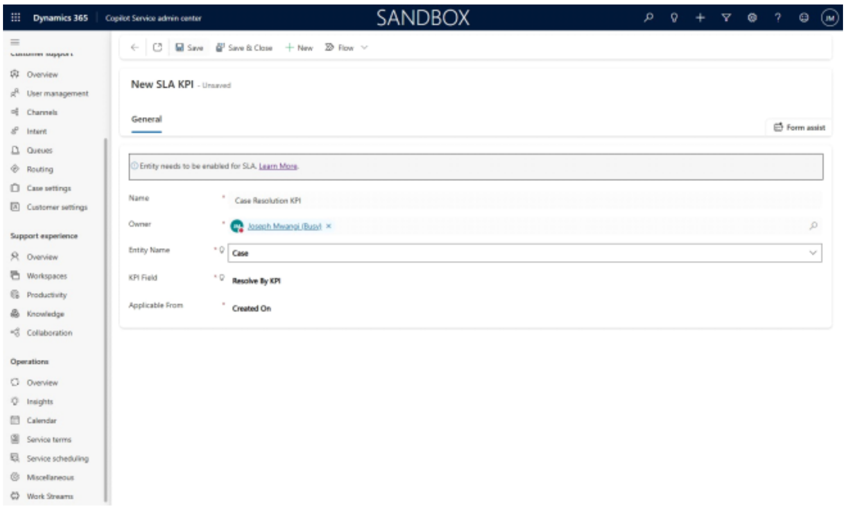
7. **Set the KPI Start Time:**

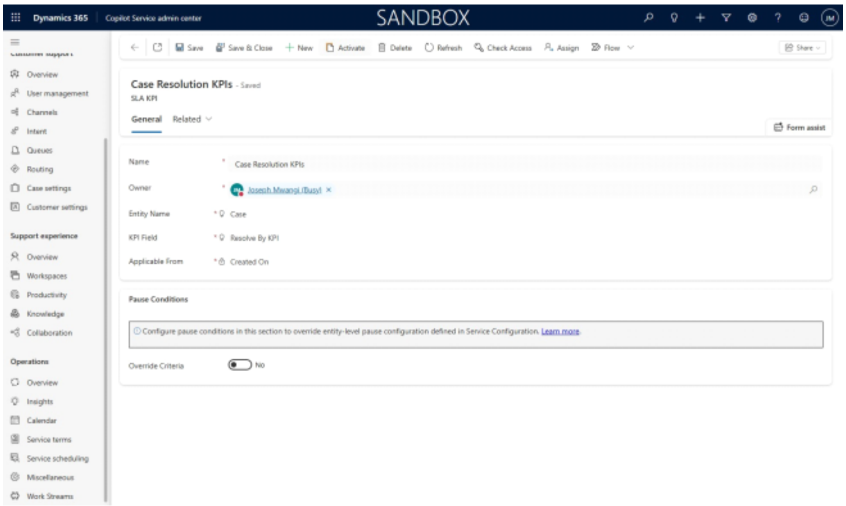
- Next, click **Applicable From** to select when this SLA KPI should be triggered. Choose **Created On** to start the SLA when a case is created. This ensures that the SLA begins counting from the moment the case is logged.



8. **Save and Activate the KPI:**

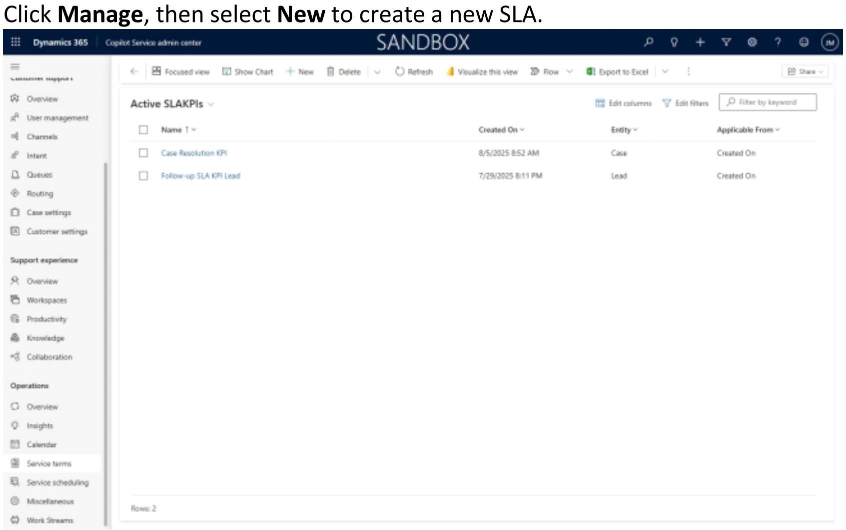
- Once you've configured the KPI settings, click **Save** to store your changes. After saving, click **Activate** to make the KPI active and start tracking performance.

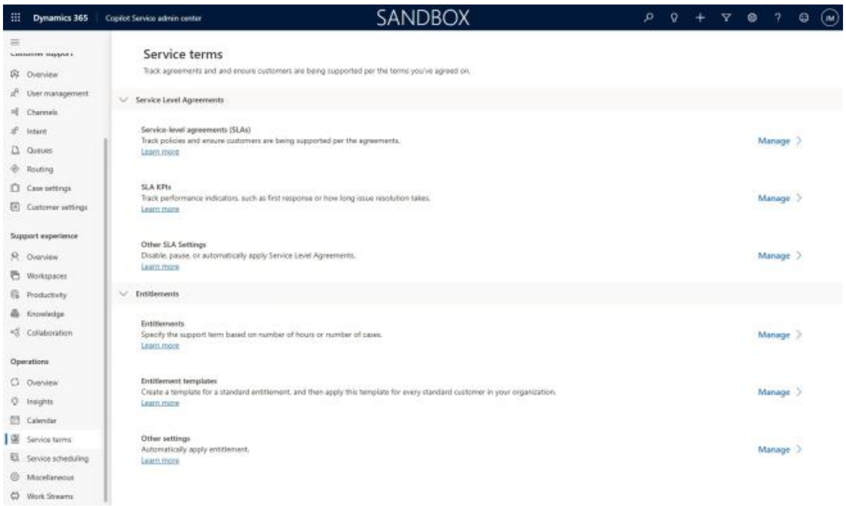




9. **Configure the SLA:**

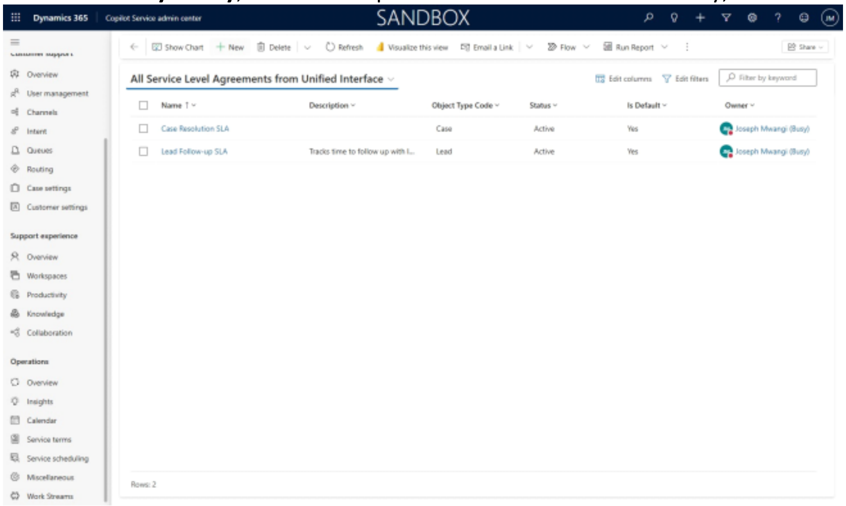
- Now that your KPI is set, return to **Service Terms** and click on **Service-level Agreements (SLAs)**. This is where you will configure the actual SLA that uses the KPI.
- Click **Manage**, then select **New** to create a new SLA.

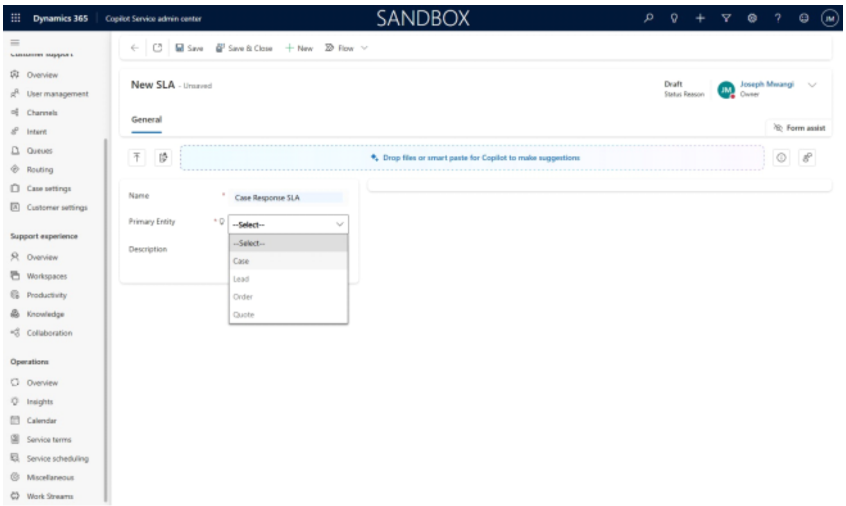


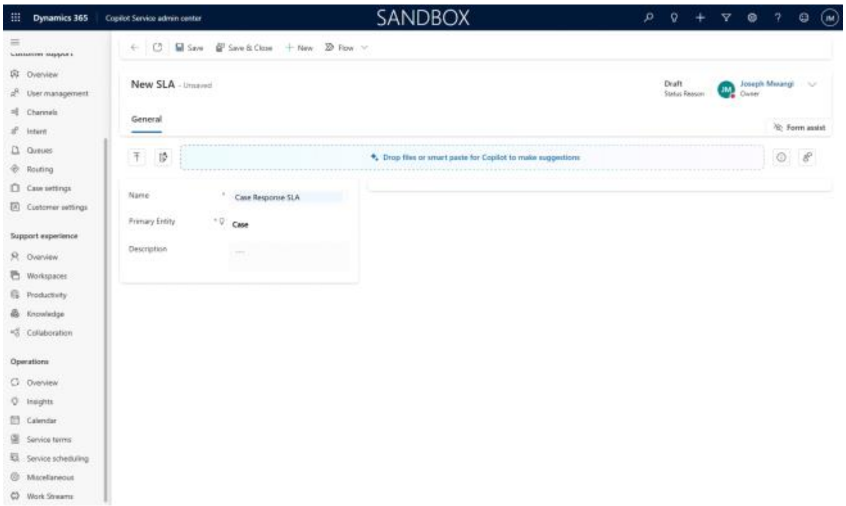


10. **Name and Link the SLA to the Entity:**

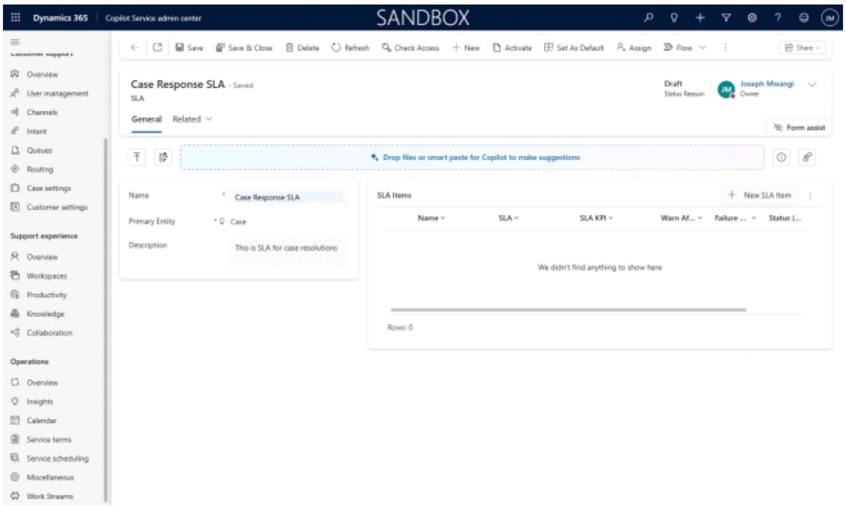
- In the **Name** field, type **Case Resolution SLA** or another relevant name for your SLA.
- For the **Primary Entity**, click the dropdown and select the **Case** entity, which links this SLA to case management activities.

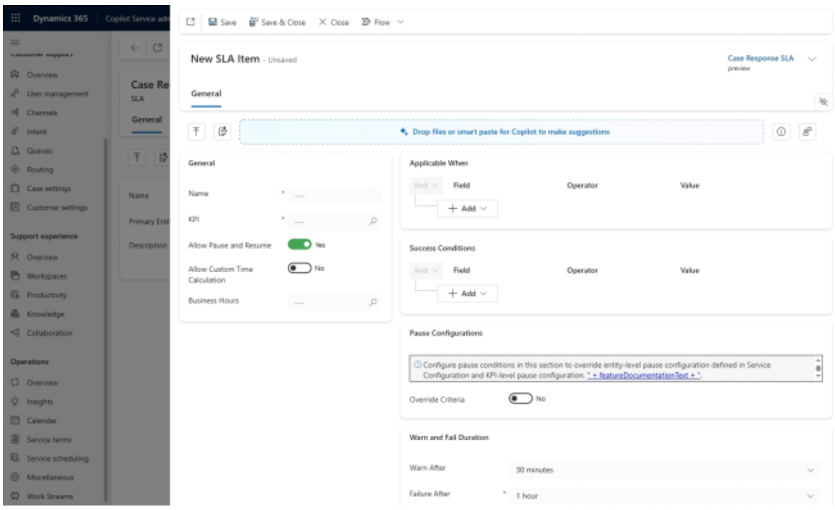




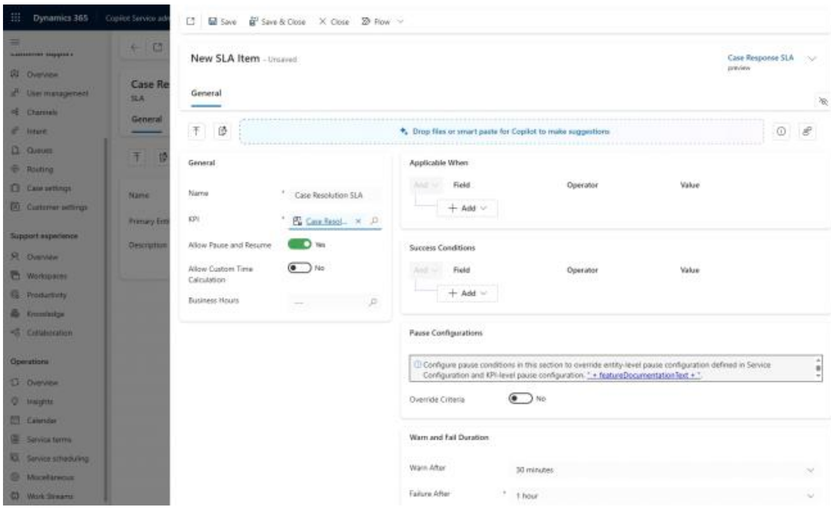


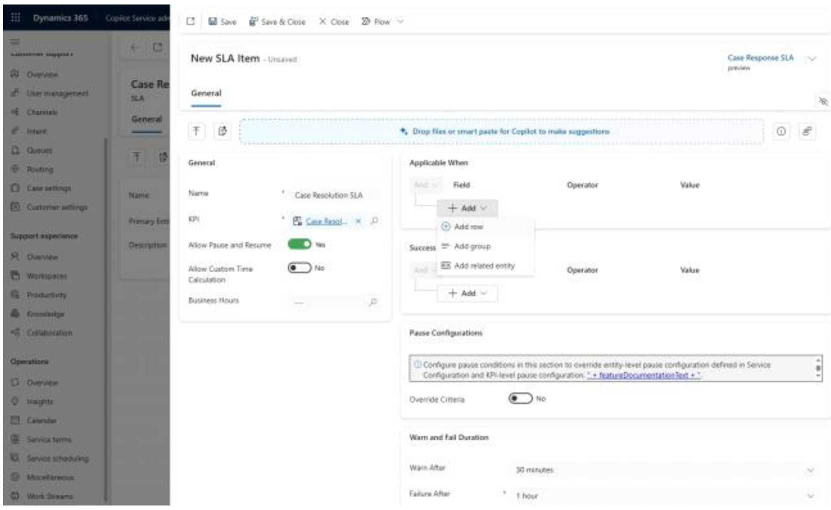
11. **Add SLA Items:**
- Click on the **SLA Items** tab, then click **New SLA Item** to add an item to the SLA.
- Name this item **Case Resolution SLA** and associate it with the **KPI** you previously created by clicking on the **KPI** field and selecting **Case Resolution KPI**.





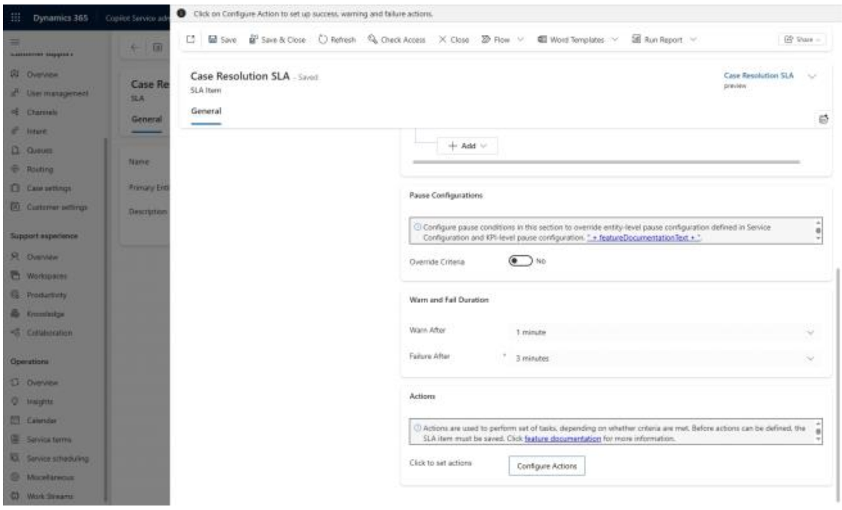
12. **Define SLA Success Conditions:**
- In the **Success Conditions** section, click **Applicable When** and define the conditions under which the SLA will be considered successful. This might include timeframes or case statuses.
- Click **Add Row** to enter multiple success conditions if needed.





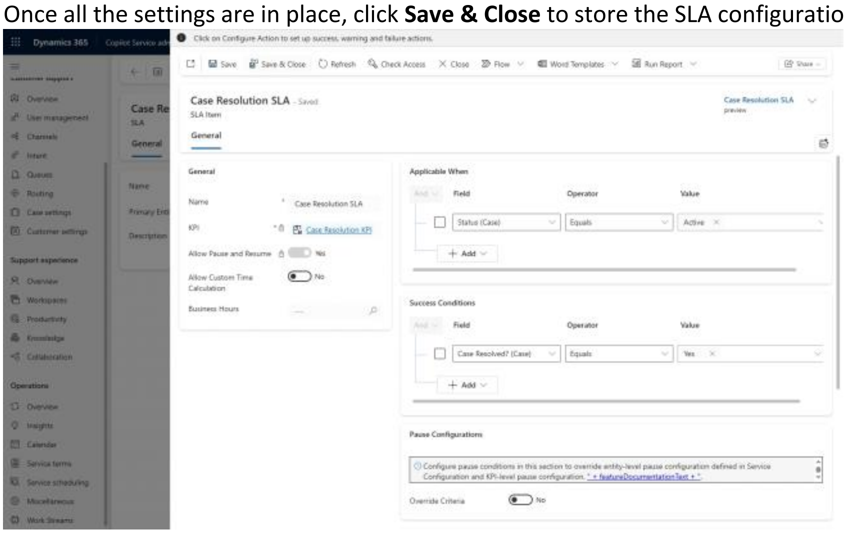
13. **Set Duration for Warnings and Failures:**

- Click on **Warn and Fail Duration** to define the time duration for when the SLA should warn or fail based on the success conditions. This ensures the SLA system has clear thresholds for warnings and failures.



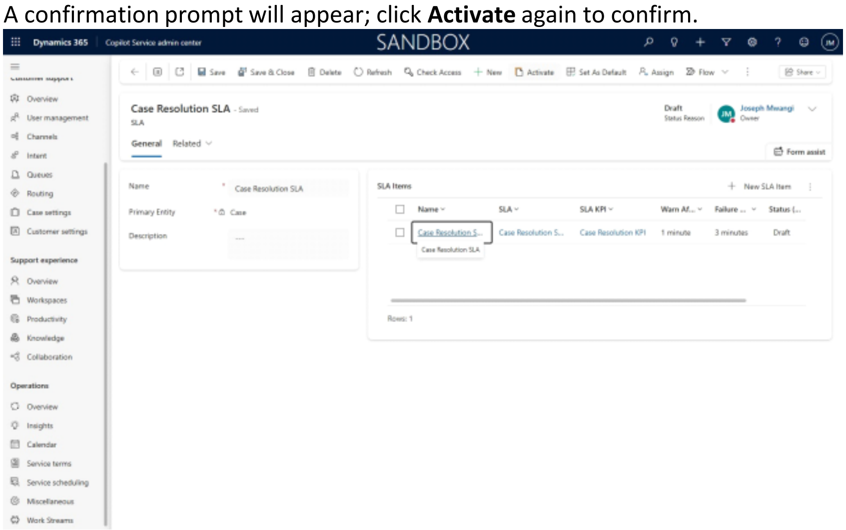
14. **Save and Close the SLA:**

- Once all the settings are in place, click **Save & Close** to store the SLA configuration and close the settings window.



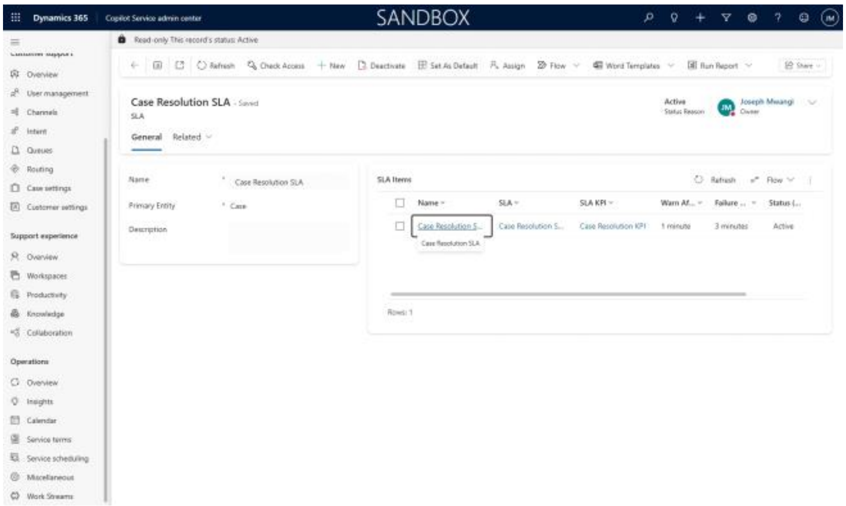
15. **Activate the SLA:**

- After saving the SLA configuration, click **Activate** to enable the SLA.
- A confirmation prompt will appear; click **Activate** again to confirm.

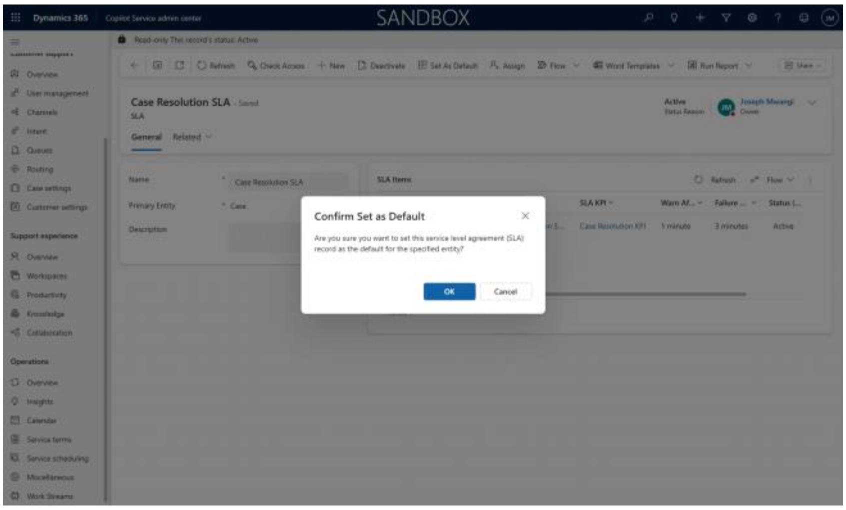


16. **Set the SLA as Default:**

- To ensure this SLA is used by default for new cases, click **Set As Default**. This will make the SLA the standard for all future case resolution activities.
- After clicking **Set As Default**, a confirmation prompt will appear. Click **OK** to confirm the default setting.



Dynamics 365
Copilot Service admin center
SANDBOX
Read-only This record's status: Active
Refresh
Check Access
New
Deactivate
Set As Default
Assign
Flow
Word Templates
Run Report
Share
Case Resolution SLA - Saved
SLA
General
Related
Active
Status Reason
Joseph Mwangi
Owner
Name
Case Resolution SLA
Primary Entity
Case
Description
SLA Items
Refresh
Flow
Name
SLA
SLA KPI
Warn Af...
Failure ...
Status (...
Case Resolution S...
Case Resolution S...
Case Resolution KPI
1 minute
3 minutes
Active
Case Resolution SLA
Rows: 1
Overview
User management
Channels
Intent
Queues
Routing
Case settings
Customer settings
Support experience
Overview
Workspaces
Productivity
Knowledge
Collaboration
Operations
Overview
Insights
Calendar
Service terms
Service scheduling
Miscellaneous
Work Streams



Dynamics 365
Copilot Service admin center
SANDBOX
Read-only This record's status: Active
Case Resolution SLA - Saved
SLA
Confirm Set as Default
Are you sure you want to set this service level agreement (SLA) record as the default for the specified entity?
OK
Cancel