# Service Entitlements Implementation Guide

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# SERVICE ENTITLEMENTS IMPLEMENTATION GUIDE

## Service Entitlements Implementation Guide

| Available in: Enterprise, Unlimited, and Developer Editions |
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Service entitlements is an AppExchange app that is completely integrated with Salesforce. It allows organizations to quickly create, update, and verify customer support entitlements from within Salesforce. Designed using Salesforce custom objects, custom s-controls, and custom fields, the service entitlements app allows you to create entitlements on contracts as well as across multiple accounts. It allows you to verify service entitlements on contacts and cases, and enables you to automatically calculate entitlement details on each case you create or update. Use service entitlements to:

- Manage your customer service based on clearly defined terms
- Easily determine the level of service to which a customer is entitled
- Automatically calculate first response times, entitled resolution times, and actual resolution times
- Set up escalation rules to automatically escalate cases that violate service level agreements

## Service Entitlements System Requirements

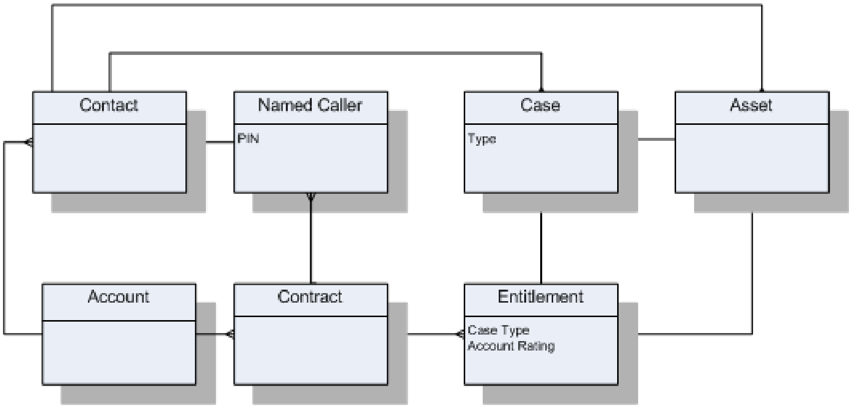
The service entitlements app includes two custom objects and one custom tab. Before you install it, make sure these items will not exceed your organization's limits for custom tabs and objects.

In addition, review the system requirements for the service entitlements app:

- Any browser that Salesforce supports:
  - Microsoft® Internet Explorer version 6.0 or later (recommended)
  - Mozilla Firefox version 1.0 or later
  - Netscape version 8.0 or later
  - Your browser must have JavaScript enabled.
  - Your browser must have cookies enabled.
- Your Salesforce organization must be enabled to use the AppExchange API.
- The service entitlements app is available in English only.

## Entity Relationship Diagram

Service entitlements includes two custom objects that relate to several standard objects. Review the following entity relationship diagram to determine how these objects are associated with other objects.




# Service Entitlements Documentation

The service entitlements app contains two documents that are available to you after installation. Both of these documents are located in the Service Entitlements Documentation folder in the Documents tab:

***Service Entitlements Implementation Guide***
: This document is in PDF format and is designed for administrators. It covers system requirements and post installation implementation tips.

***Service Entitlements User Guide***
: This document is in HTML format and is designed for users of the service entitlements app. We recommend updating it to fit your organization's business process for service entitlements. However, store the original version of this document before changing it so that you can refer to the original in the future if necessary.
Users can view this HTML guide by clicking the **Help for Entitlements** custom link on any record detail page to which it has been added. For more details, see Configuring Service Entitlements on page 2.

### Note

If you change the name of this file or convert it into another file type, you can still store it in the Service Entitlements Documentation folder but you may need to modify the **Help for Entitlements** custom links that refer to the original filename.

# Configuring Service Entitlements

The service entitlements app is available for installation from the AppExchange. After you have installed the service entitlements app successfully, configure it for your organization using these tips:

**Add custom fields to standard objects in the order specified**

### Note

When adding these fields, remember to make them visible to all appropriate profiles and add them to page layouts, unless otherwise specified. The custom field wizard guides you through this process.

For the formula fields, you can copy the supplied code and paste it into the text box available when defining the formula.

On contacts:

Add the `Service Entitlement` formula field. This field displays a custom s-control which lists verified service entitlements that can be associated with a contact. Set the return type of the formula to text and insert the following code:

```
HYPERLINK("/appex/app.jsp?"
& "appParam=SLA_entitlementContact&setAPISessionId=1"
& "&setAPIServerURL=1 &apiURL=API_Partner_Server_URL_70"
& "&accid=" & {!AccountId} & "&contactid=" & {!Id}
& "&contactname=" & {!FirstName} & " " & {!LastName},
IMAGE("/appex/sla/img/Verify_Service_Entitlement.gif",
"Verify this contact is entitled to service"))
```

On cases:

- Add the `Actual First Response` date/time field. This field automatically calculates the date and time of a first response to specific a case. Set this field to read-only on case page layouts so that automatically calculated values cannot be modified by users.
- Add the `entitleAssetId` text field with a length of 15. This field determines when there is an entitlement mismatch on a case.This field does not need to be added to page layouts as users do not need to see this field.
- Add the `Entitled Close Date` date/time field. This field automatically calculates the date and time a contact is entitled to have a specific case resolved. Set this field to read-only on case page layouts so that automatically calculated values cannot be modified by users.
- Add the `Entitled First Response` date/time field. This field automatically calculates the date and time a contact is entitled to a first response to a specific case. Set this field to read-only on case page layouts so that automatically calculated values cannot be modified by users.
- Add the `Service Entitlement` custom lookup field and relate it to the Service Entitlement custom object, and change the `Field Name` from "SFDC_Entitlement" to "Entitlement". The `Service Entitlement` custom lookup field displays the service entitlement associated with a specific case.

  Accept all of the default settings in the custom field wizard so that the Cases related list is added to the entitlements page layout. This related lists allows you to see which cases are associated with entitlements.

- Add the `entitlementCaseLink` formula field.This field determines when there is an entitlement mismatch on a case. Set the return type of the formula to text and insert the following code:

  ```
  "/appex/app.jsp?"
  & "appParam=SLA_entitlementCase&setAPISessionId=1"
  & "&setAPIServerURL=1&apiURL=API_Partner_Server_URL_70&accid="
  & {!AccountId} & "&contactid=" & {!ContactId} & "&caseid="
  & {!Id}& "&assetid="& {!AssetId}
  ```

  This field does not need to be added to page layouts as users do not need to see this field.

- Add the `Options` formula field. This field displays the **Change Service Entitlement**, **Respond with Email**, and **Respond with Call** buttons on a case. Set the return type of the formula to text and insert the following code:

  ```
  IF({!Entitlement__c}<>null,IF({!entitleAssetId__c}={!AssetId},
  HYPERLINK({!entitlementCaseLink__c},
  IMAGE("/appex/sla/img/Change_Service_Entitlement.gif",
  ```

```
"Change Service Entitlement" )),
HYPERLINK({!entitlementCaseLink__c},
IMAGE("/appex/sla/img/Invalid_Entitlement.gif",
"Invaild Entitlement" ) )),
HYPERLINK({!entitlementCaseLink__c},
IMAGE("/appex/sla/img/Verify_Service_Entitlement.gif",
"Verify Service Entitlement" ) ))
&HYPERLINK("/appex/app.jsp?appParam=SLA_emailResponse&"
& "setAPISessionId=1&setAPIServerURL=1&"
& "apiURL=API_Partner_Server_URL_70&caseid="
& {!Id} & "&contactid=" & {!ContactId},
IMAGE("/appex/sla/img/Response_by_Email.gif",
"Respond with an Email" )) & HYPERLINK("/appex/app.jsp?"
& "appParam=SLA_callResponse&setAPISessionId=1"
& "&setAPIServerURL=1&apiURL=API_Partner_Server_URL_70"
& "&caseid=" & {!Id} & "&contactid=" & {!ContactId},
IMAGE("/appex/sla/img/Response_by_Phone.gif",
"Response by Phone"))
```

### Set field-level security

- Set field-level security on the `Contract Name` field on contracts to editable or required for the necessary profiles so that users can verify and change service entitlements. By default, the `Contract Name` field is set to hidden.
- Set field-level security on the `Asset` field on cases and service entitlements to editable or required for the necessary profiles so that users can verify and change service entitlements.

### Update picklist values

- Add the picklist values from the `Type` field on cases to the `Case Type` field on the Service Entitlement custom object. This allows users to specify the support a customer is entitled to receive for a particular type of issue.
- Add the picklist values from the `Rating` field on accounts to the `Account Rating` field on the Service Entitlement custom object. This allows users to specify the support a customer is entitled to receive for a particular account rating.

### Customize page layouts

- Add the Named Callers and Service Entitlements related lists to contract page layouts so that users can add named callers and service entitlements to contracts.
- Create a new section on case page layouts named Service Entitlements and move the custom fields related to entitlements to this section. This allows users to easily find fields related to entitlements on cases.

**Note**

Remember that you do not need to add the `entitleAssetId` or `entitlementCaseLink` fields to this section because it is not necessary for users to see these fields.

### Configure user profiles

- Set the Service Entitlements tab to "Default On" for the profiles of users who need to use the Service Entitlements tab as well as the Service Entitlements related list.

- Set the appropriate user permissions for each new custom object:
    - Users who create service entitlements need the "Read," "Create," "Edit," and "Delete" permissions on all service entitlements custom objects: Service Entitlement and Named Caller.
    - Users who verify service entitlements, but never create them, need the "Read" permission on all service entitlements custom objects.

**Customize documentation**

- Update the *Service Entitlements User Guide* as necessary for your organization. See Service Entitlements Documentation on page 2.
- Add the **Help for Entitlements** custom link to the appropriate page layouts in your organization. Users can click this link to view the *Service Entitlements User Guide* which contains instructions on creating and using service entitlements. You can add this custom link to all your contract, case, and contact page layouts. It is included by default on service entitlement page layouts.

# Deploying Service Entitlements

Before rolling out the service entitlements app, we recommend preparing your users. Review the following suggestions for deployment:

- Make sure you have made all the necessary customizations for your organization. See Configuring Service Entitlements on page 2.
- Meet with the appropriate users, and provide training on how to use the app and information on how to access the documentation if they need additional help.
- Notify users of the permissions they must have to use the service entitlements app.