

Case Milestone & Entitlement Dashboard

Thanks for installing this package! This is intended as a starting point for your own Dashboard, feel free to customize both the underlying reports and the Dashboard itself - I suggest creating new versions of the reports though so you don't break any of the existing Dashboard components.

[AppExchange listing here](#)

Background information

Here are some useful links that explain some of the key fields on the 2 main objects (Case and CaseMilestone) referenced on this dashboard:

Details on the Case "Milestone Status" field values:

https://help.salesforce.com/articleView?id=sf.entitlements_milestones_statuses.htm&type=5

Details on the CaseMilestone objects fields: - checkout page 24 of this doc:

http://resources.docs.salesforce.com/latest/latest/en-us/sfdc/pdf/salesforce_entitlements_implementation_guide.pdf

Details about the underlying reports

You can edit each of the reports below as you see fit - I suggest you create a copy before doing so though so prevent any issues with the current Dashboard components

OPEN CASES WITH MILESTONES

Description:

Allows you to identify all of your currently open cases, and more importantly all of those that are currently in violation of their SLA

Filtered by:

- Case: Open equals True

Grouped by:

- Milestone Status (Case field)
 - Milestone (Name of the Milestone)
-

CLOSED MILESTONES

Description:

This report gives you a view into how you have been adhering to your milestones, split by Case Milestone Status - allowing you to identify which milestones in particular are most commonly the reason for a case not being closed in a Compliant state.

Filtered By:

- CaseMilestone: Completed equals True

Grouped by

- Start Date
 - Milestone Status
 - Milestone
-

CASE MILESTONES OVER TIME**Description:**

This report allows you to monitor performance trends over time, seeing if your SLA violations are trending up or down, as well as being able to identify total time breached.

This report includes a Time Breached row formula, which calculates the difference between the actual elapsed time field and the target response time, to determine the number of minutes that the milestone was breached for.

Filtered By:

- CaseMilestone: Completed equals True

Grouped by

- Start Date
 - Milestone Status
 - Milestone
-

CASE MILESTONE VIOLATIONS LAST WEEK**Description:**

This report is designed to allow you to monitor SLA adherence and compare this week to the last weeks performance.

Filtered By:

- CaseMilestone: Violation equals True
- CaseMilestone: Target Date equals LAST WEEK

Grouped by

- Start Date
 - Milestone
 - Violation
-

CASE MILESTONE VIOLATIONS THIS WEEK

Description:

This report is designed to allow you to track your SLA adherence this week versus previous weeks.

Filtered By:

- CaseMilestone: Violation equals True
- CaseMilestone: Target Date equals THIS WEEK

Grouped by

- Start Date
 - Milestone
 - Violation
-

CASE MILESTONES BY TYPE**Description:**

This report is designed to allow you to identify what case types are causing the most trouble for your agents to remain within SLA.

This could easily be updated to use Case Reason instead of type if your company uses that field instead.

Filtered By:

- None

Grouped by

- Type
 - Milestone Status
 - Milestone
-

CASE MILESTONES BY BUSINESS HOURS**Description:**

This report allows you to monitor your progress based on the Business Hours of your business. Many companies have different offices or different brands that operate with different business hours, so this allows an easy way to slice the data by region, office or brand.

Filtered By:

- None

Grouped by

- Business Hours
 - Milestone Status
-

Want to be able to report by Entitlement Process?

Unfortunately OOB you cannot report by the Entitlement Process, as that field is not accessible on the Case object. However you can create your own formula on the Case object which points at the related Entitlement process - this custom formula field can then be added to your reports.

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