



Entitlement Management Implementation Guide

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INTRODUCTION TO ENTITLEMENT MANAGEMENT

Easily enhance and enforce your customer support processes with entitlement management. Entitlement management lets you and your support reps:

- Verify if your customers are eligible for support
- Create and maintain service contracts for your customers
- Specify service levels for each customer, such as first response and resolution times
- Enforce service levels with time-dependent, automated processes that instruct reps how to resolve cases

Using this Guide

Use this guide to perform set up tasks in the following sequence:

1. [Familiarize yourself with entitlement management features.](#)
2. [Prepare your implementation by answering the planning questions.](#)
3. [Choose an entitlement management model.](#)
4. [Set up entitlement management.](#)
5. [Customize entitlement management fields.](#)
6. [Define and enforce service levels.](#)
7. [Give users access to entitlement management.](#)
8. [Optionally, enable entitlement management for a customer portal.](#)
9. [Optionally, enable entitlement management for a partner portal.](#)
10. [Build custom report types so that users can report on entitlements.](#)
11. [Review additional implementation tips and best practices.](#)

What Is Entitlement Management?

Entitlement management includes the following features to help you provide the correct service levels to your customers:

Verifying Entitlements

Support agents can verify that customers are eligible for support before creating cases for them. Here's an example of how support agents use entitlements:

1. A customer calls support.
2. A support agent searches for the caller's account, contact, asset, or service contract.
3. The agent verifies there's an active entitlement on the Entitlements related list.
4. The agents creates a case from the entitlement.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

Defining Service Levels

Users can create and maintain service contracts that represent different kinds of customer support, such as warranties, subscriptions, or maintenance agreements. Each service contract can include the specific products covered under the agreement.

Enforcing Service Levels

You can add time-dependent processes to entitlements that specify the actions, or milestones, your support team must take when service levels on cases are near violation, violated, or successfully completed.

Providing Portal Access

You can add entitlement management to a Customer Portal or partner portal so that portal users can view their service contracts and entitlements, and create cases with the correct entitlements.

Reporting on Entitlements and Service Levels

Administrators can use custom report types to define report criteria from which users can run and create reports on entitlements and service contracts.

Useful Terminology

The following terms are used when describing entitlement management functionality.

Entitlements

Entitlements help you determine if your customers are eligible for customer support so you can create cases for them. A customer may be eligible for support based on a particular asset, account, or service contract. Depending on how entitlements are set up, you can view and create them on the Entitlements tab or from the Entitlements related list on accounts, contacts, assets, or service contracts. You can click **Create Case** on the Entitlements related list to create cases that automatically include the correct entitlement, account, contact, and asset.

If set up, the Entitlements or Entitlement Template related lists let you add existing entitlements to contacts and products.

Entitlements don't automatically apply to cases created with Web-to-Case or Email-to-Case. If needed, you can add entitlements to these features using Apex code.

Entitlement Contact

Entitlement contacts are contacts specified to receive customer support—for example, a named caller. They're listed on an entitlement's Contacts related list or the contact's Entitlements related list.

Entitlement contacts don't have page layouts, search layouts, buttons, links, or record types.

Entitlement Template

Entitlement templates are predefined terms of customer support that you can quickly add to products. For example, you can create entitlement templates for Web or phone support so that users can easily add entitlements to products offered to customers.

Service Contract

Service contracts are agreements between you and your customers for a type of customer support. Service contracts can represent different kinds of customer support, such as warranties, subscriptions, or service level agreements (SLAs).

Depending on how service contracts are set up, you can view and create them on the Service Contracts tab or from the Service Contracts related list on accounts and contacts.

Contract Line Item

Contract line items are specific products covered by a service contract. They only display to users on the Contract Line Items related list on service contracts, not contracts. You can only use contract line items if your organization uses products. Schedules aren't available for contract line items. Customer Portal users can't access contract line items.

Milestone

Milestones are required steps in your support process. They're metrics that represent service levels to provide to each of your customers. Examples of milestones include first response and resolution times on cases. Milestones can display one of the following statuses on cases:

Milestone Status	Description	Example
✔ Compliant	Milestones on the case are complete or not in violation. New cases display as compliant because they're not in violation.	The first response on a case is complete or not in violation.
🚫 Open Violation	Milestones on the case are violated; steps in a support process are incomplete.	The first response on a case is incomplete.
🚩 Closed Violation	Milestones on the case were violated, but the steps in the support process were completed.	The first response on a case was incomplete, but completed nonetheless.

You can create a custom report to view a list of cases with milestones by choosing the Cases with Milestones report type. You can also view cases with milestones by creating case list views that filter on milestone fields.

Entitlement Process

Entitlement processes are timelines that include all of the steps (milestones) that your support team must complete to resolve cases. Each process includes the logic necessary to determine how to enforce the correct service level for your customers.

Not all entitlements require entitlement processes. For example, an entitlement might just state that a customer is eligible for phone support and business hours define phone support to be 24/7. If you needed to add more to that definition—for example, if certain people need to be emailed after a customer's case goes unresolved for two hours—you would use an entitlement process.

Cases move through an entitlement process as follows:

1. A support rep adds an entitlement with an entitlement process to a case.
2. The case enters the process based on its creation date or a custom date/time field. A custom date/time field lets users edit a date on the case to trigger when it enters the process.
3. Salesforce assigns milestones with matching criteria to the case. For example, if a milestone's criteria is *Priority equals High*, and a case has a `Priority` of High, Salesforce assigns it to the Priority equals High milestone.
A case associates with one milestone at a time; it can associate with many milestones as it moves through the process.
4. Milestone actions determine when and if warning, violation, or success workflow actions fire for the case.
5. A support rep updates the case to complete a milestone action.
6. After a case is updated, it cycles through the entitlement process and initiates any milestones that match its criteria.
7. The case exits the process based on custom criteria or when it's closed.

You can view cases with assigned entitlements by creating case list views that filter on entitlement process fields.

Building an entitlement process includes:

1. Choosing an entitlement model.
2. Setting up milestones.
3. Setting up an entitlement process.

4. Adding milestones to the entitlement process.
5. Adding milestone actions to the entitlement process.
6. Adding the entitlement process to entitlements.

Entitlement processes only apply to cases with assigned entitlements.

You can create up to 1000 entitlement processes and include up to ten milestones in each entitlement process.




To view or cancel active entitlement processes, from Setup, enter *Entitlement Processes* in the **Quick Find** box, then select **Entitlement Processes**.

Entitlement versioning lets you make changes to existing entitlement processes, even if they're assigned to active entitlements and cases. This can be useful if the business rules behind your entitlement processes change, for example, or if you need to create multiple versions of the same entitlement process that have only minor differences. With entitlement versioning, you don't need to create entirely new processes; you can simply create new versions of existing ones.

Milestone Actions

Milestone actions are time-dependent workflow actions that occur at every step (milestone) in an entitlement process. Examples of milestone actions include sending email alerts to specified users an hour before a first response is near violation or automatically updating certain fields on a case one minute after a first response successfully completes.

You can add three types of actions to milestones:

Action Type	Description
 Success Actions	The actions to take when a milestone successfully completes.
 Warning Actions	The actions to take when a milestone is near violation.
 Violation Actions	The actions to take when a milestone is violated.

You can automate the following actions for each action type:

Automation Type	Description	Example
Task	Assigns a task to a specific user. You can specify the task's Subject , Status , Priority , and Due Date .	Create a task for a support rep to call a customer when a first response is violated.
Email Alert	Emails a specific template to a designated recipient.	Notify case owners when their cases are near violation of a first response.
Field Update	Changes the value of a selected field. You can specify a value or create a formula for the new value.	Update the case Priority field to <i>High</i> when a first response is near violation.
Outbound Message	Sends a message to a designated endpoint. You can also specify a username and the data you want to include in the message.	Send data about parts or services to an external system after a first response is successful.

PLANNING YOUR IMPLEMENTATION

Before you begin setting up entitlement management, it's important that you consider the following questions. The answers to these questions are prerequisites to completing the tasks in this guide.

How should support agents verify that customers are eligible for support?

You can set up entitlement management so that customers are eligible for support based on:

Accounts

At least one contact on the account is eligible for support.

Contacts

Specific contacts are eligible for support.

Assets

Specific assets (purchased products) are eligible for support.

Service Contracts

Support agents can verify that a specific service contract includes support.

Contract Line Items

Support agents can verify that a service contract includes support for a specific product.

Choose how you want support agents to validate customers' eligibility for support and how much detail you want to include in your entitlement management process. See [Choosing an Entitlement Model](#) on page 8.

For more information on how agents verify support eligibility, see "Verifying Entitlements" in the Salesforce Help.

Do you want support eligibility based only on accounts or contacts?

If you only want support agents to verify that an account or contact is eligible for support, set up entitlements only. See [Setting Up Entitlements Only](#) on page 10.

Do you want to define specific service levels for customers?

If you want to create different kinds of customer support, such as warranties, subscriptions, or service level agreements (SLAs), set up service contracts with entitlements. See [Setting Up Service Contracts with Entitlements](#) on page 11.

Do you want to manage customer support based on products purchased by your customers?

If your organization uses the products feature, you can set up entitlement management so that customers are eligible for support based on the products they've purchased. Products are represented as contract line items on service contracts. If you want to provide support

to customers based on products, set up service contracts with contract line items and entitlements. See [Setting Up Service Contracts with Contract Line Items and Entitlements](#) on page 13.

Do you want to predefine terms of support on the products offered to your customers?

If your organization uses the products feature, you can set up entitlement templates so that users can add predefined terms of support to products. For example, you can create entitlement templates for Web or phone support so that users can easily add entitlements to products offered to customers. See [Creating Entitlement Templates](#) on page 16.

Do you want to add custom fields to entitlement management?

You can prompt users to enter information that's unique to your industry or support processes by creating custom fields. For example, you might create a currency field on entitlements named `Cost to Renew`. See [Creating Custom Fields](#) on page 18.

Do you want to track the history of entitlement management fields?

You can track changes on entitlement management fields. This lets you review who, when, and what has changed on every single entitlement, service contract, and contract line item. See [Tracking Field History](#) on page 18.

Do you want to restrict the entitlements that users can select on a case?

If you want users to choose entitlement-related items that are only relevant to cases' accounts or contacts, set up lookup filters. Lookup filters ensure data quality by reducing the number of options users can select from lookup fields. See [Setting Up Entitlements-Related Lookup Filters on Cases](#) on page 19.

Do you want to enforce service levels on cases?

You can add time-dependent processes to entitlements that specify the actions your support team must take when service levels on cases are near violation, violated, or successfully completed. For example, you can set up entitlement management to instruct support agents to call certain people when a customer's case is unresolved after two hours. See [Enforcing Service Levels](#) on page 21.

Who should have access to entitlement management?

All users must have permissions that grant them access to entitlement management features, fields, and tabs. Decide which users need access to entitlement management.

For more information, including a description of the permissions, see [Giving Users Access to Entitlement Management](#) on page 32.

Do you want Customer Portal users to have access to entitlements or service contracts?

To give your customers access to entitlement management, make the Entitlements or Service Contracts tabs visible in the Customer Portal. All customers, except high-volume portal users, can access entitlement management. See [Providing Entitlement Management in the Customer Portal](#) on page 35.

Do you want partner portal users to have access to entitlements, service contracts, or contract line items?

To give your partners access to entitlement management, make the Entitlements or Service Contracts tabs visible in the partner portal. See [Providing Entitlement Management in the Partner Portal](#) on page 37.

Do you want to customize reports so users can view snapshots of entitlement management data?

Use custom report types to define report criteria from which users can run and create reports on entitlements, service contracts, and contract line items. See [Reporting on Entitlement Management](#) on page 39.

Do you want to review a list of additional entitlement management details?

Before you begin your implementation, we suggest that you review a list of tips and best practices that go beyond the scope of the questions above. See [Entitlement Management Notes, Limitations, and Best Practices](#) on page 40.

CHOOSING AN ENTITLEMENT MODEL

The first step to setting up entitlement management is to choose an entitlement model. Knowing which model to use helps you determine what you need to set up.

Entitlement Model	Your Goal	Reps Verify Support Eligibility from	Use If	To Set Up
Entitlements Only	Support reps verify that contacts are eligible for customer support before they create cases	<ul style="list-style-type: none"> Accounts Contacts Assets Entitlements tab 	<ul style="list-style-type: none"> There's no need to manage your customers' entitlements as part of a service contract Your entitlements don't have a renewal process Entitlements aren't purchased by your customers; they're bundled with products (warranties) Your customers' entitlements are short term and managed independently of each other 	See Setting Up Entitlements Only on page 10.
Service Contracts with Entitlements	Support reps verify that a contact is eligible for support based on a service contract	<ul style="list-style-type: none"> Accounts Contacts Assets Service contracts 	<ul style="list-style-type: none"> Entitlements are purchased and managed separately from the 	See Setting Up Service Contracts with Entitlements on page 11.

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Choosing an Entitlement Model

Entitlement Model	Your Goal	Reps Verify Support Eligibility from	Use If	To Set Up
		<ul style="list-style-type: none"> • Service contracts tab • Entitlements tab 	<ul style="list-style-type: none"> • products they cover and are part of a service contract • Your customers' entitlements are renewed at a contract level • Salesforce is used for customer support but may not be used for service contract management 	
Service Contracts with Contract Line Items and Entitlements	Support reps verify that a contact is eligible for support based on contract line items (products) in a service contract	<ul style="list-style-type: none"> • Accounts • Contacts • Assets • Products • Service contracts • Service contracts tab • Entitlements tab 	<ul style="list-style-type: none"> • Salesforce is used for customer support and to manage your customers' service contracts • Your support team manages service contract transactions, such as transfers, mergers, and renewals • Warranties, subscriptions, or other support products appear as line items on your sales orders and map to one or more entitlements • Entitlements are created and updated through an integration with your order management system 	See Setting Up Service Contracts with Contract Line Items and Entitlements on page 13.

 **Note:** For information on how reps verify support eligibility, see “Verifying Entitlements” in the Salesforce Help


 **Tip:** You can switch to a different entitlement model at any time.

SETTING UP ENTITLEMENT MANAGEMENT

Before you set up entitlement management, see [Choosing an Entitlement Model](#) on page 8 to determine which model is best for your support team. You can set up entitlement management in one of the following ways:

- [Setting Up Entitlements Only](#)
- [Setting Up Service Contracts with Entitlements](#)
- [Setting Up Service Contracts with Contract Line Items and Entitlements](#)

Additionally, if your organization uses the products feature, you can set up entitlement templates so that users can add predefined terms of support to products. See [Creating Entitlement Templates](#) on page 16.

 **Note:** You can use entitlement templates without setting up the service contracts with contract line items and entitlements model. See [Choosing an Entitlement Model](#) on page 8.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Setting Up Entitlements Only

To set up entitlements:

1. Enable entitlements.
 - a. From Setup, enter *Entitlement Settings* in the Quick Find box, then select **Entitlement Settings**.
 - b. Select **Enable Entitlements**.
 - c. Click **Save**.
2. Customize entitlement page layouts. This lets you specify which entitlement fields display to users.
 - a. From the object management settings for entitlements (from Setup, enter *Entitlements* in the Quick Find box), go to Page Layouts.
 - b. Click **Edit** for the page layout that you want to customize.
 - c. Click **Save** when you're done.

 **Tip:** To limit the number of cases that entitlements support, add these fields to entitlement page layouts:

Field	Description
Per Incident	Lets you limit the number of cases the entitlement supports.
Cases Per Entitlement	The total number of cases the entitlement supports.
Remaining Cases	The number of cases the entitlement can support. This field decreases in value by one each time a case is created with the entitlement.

USER PERMISSIONS

To set up entitlements:

- "System Administrator"

3. Add the `Entitlement Name` lookup field to case page layouts. This lets users add entitlements to cases.
 - a. From the object management settings for cases, go to Page Layouts.
 - b. Click **Edit** next to the page layout that you want to customize.
 - c. Add the `Entitlement Name` field.
 - d. Click **Save**.
4. Add the Entitlements related list to account, contact, and asset page layouts. This lets users verify entitlements and create cases that are automatically associated with the correct entitlement, account, contact, and asset.
 - a. From the object management settings for accounts, contacts, or assets, go to Page Layouts.
 - b. Click **Edit** next to the page layout that you want to customize.
 - c. Add the Entitlements related list.
 - d. Click **Save**.
5. Add the Entitlements tab to an app. This lets users view the Entitlements tab in a specific app.
 - a. From Setup, enter `Apps` in the `Quick Find` box, then select **Apps**.
 - b. Click **Edit** next to the app in which you want to add the Entitlements tab.
 - c. Select Entitlements from the `Available Tabs` and click **Add**.
Optionally, click **Up** and **Down** to define the order in which the tab will display in the app.
 - d. Click **Save**.
6. Optionally, add the Cases and Contacts related lists to entitlements page layouts. This lets users:
 - View cases and contacts associated with entitlements
 - Create cases automatically associated with the correct entitlements
 - Add contacts to entitlements
 - a. From the object management settings for entitlements, go to Page Layouts.
 - b. Click **Edit** next to the page layout that you want to customize.
 - c. Add the Cases and Contacts related lists.
 - d. Click **Save**.

Setting Up Service Contracts with Entitlements

To set up service contracts with entitlements:

1. [Set up service contracts](#).
2. [Set up entitlements](#).

Setting Up Service Contracts

To set up service contracts:

1. Enable entitlements.
 - a. From Setup, enter `Entitlement Settings` in the `Quick Find` box, then select **Entitlement Settings**.

USER PERMISSIONS

To set up service contracts:

- "Manage Entitlements"
- AND
- "Customize Application"

- b. Select `Enable Entitlements`.
 - c. Click **Save**.
- 2. Customize service contract page layouts. This lets you specify which service contract fields display to users.
 - a. From the object management settings for service contracts, go to Page Layouts.
 - b. Click **Edit** next to the page layout that you want to customize.
 - c. Customize the page as necessary and click **Save** when you're done.
- 3. Add the Service Contracts tab to an app. This lets users view the Service Contracts tab in a specific app.
 - a. From Setup, enter `Apps` in the `Quick Find` box, then select **Apps**.
 - b. Click **Edit** next to the app in which you want to add the Service Contracts tab.
 - c. Select Service Contracts from `Available Tabs` and click **Add**.
Optionally, click **Up** and **Down** to define the order in which the tab will display in the app.
 - d. Click **Save**.
- 4. Add the Service Contracts related list to account and contact page layouts. This lets users create, update, and verify service contracts from accounts and contacts.
 - a. From the object management settings for accounts or contacts, go to Page Layouts.
 - b. Click **Edit** next to the page layout that you want to customize.
 - c. Add the Service Contracts related list.
 - d. Click **Save**.

Setting Up Entitlements

To set up entitlements:

1. Customize entitlement page layouts. This lets you specify which entitlement fields display to users.
 - a. From the object management settings for entitlements (from Setup, enter `Entitlements` in the `Quick Find` box), go to Page Layouts.
 - b. Click **Edit** for the page layout that you want to customize.
 - c. Click **Save** when you're done.



Tip: To limit the number of cases that entitlements support, add these fields to entitlement page layouts:


Field	Description
<code>Per Incident</code>	Lets you limit the number of cases the entitlement supports.
<code>Cases Per Entitlement</code>	The total number of cases the entitlement supports.
<code>Remaining Cases</code>	The number of cases the entitlement can support. This field decreases in value by one each time a case is created with the entitlement.

2. Add the `Entitlement Name` lookup field to case page layouts. This lets users add entitlements to cases.
 - a. From the object management settings for cases, go to Page Layouts.
 - b. Click **Edit** next to the page layout that you want to customize.
 - c. Add the `Entitlement Name` field.
 - d. Click **Save**.
3. Add the Entitlements related list to account, contact, and asset page layouts. This lets users verify entitlements and create cases that are automatically associated with the correct entitlement, account, contact, and asset.
 - a. From the object management settings for accounts, contacts, or assets, go to Page Layouts.
 - b. Click **Edit** next to the page layout that you want to customize.
 - c. Add the Entitlements related list.
 - d. Click **Save**.
4. Add the Entitlements tab to an app. This lets users view the Entitlements tab in a specific app.
 - a. From Setup, enter `Apps` in the `Quick Find` box, then select **Apps**.
 - b. Click **Edit** next to the app in which you want to add the Entitlements tab.
 - c. Select Entitlements from the `Available Tabs` and click **Add**.
Optionally, click **Up** and **Down** to define the order in which the tab will display in the app.
 - d. Click **Save**.
5. Optionally, add the Cases and Contacts related lists to entitlements page layouts. This lets users:
 - View cases and contacts associated with entitlements
 - Create cases automatically associated with the correct entitlements
 - Add contacts to entitlements
 - a. From the object management settings for entitlements, go to Page Layouts.
 - b. Click **Edit** next to the page layout that you want to customize.
 - c. Add the Cases and Contacts related lists.
 - d. Click **Save**.

Setting Up Service Contracts with Contract Line Items and Entitlements

To set up service contracts with contact line items and entitlements:

1. [Set up service contracts](#).
2. [Set up contract line items](#).
3. [Set up entitlements](#).

 **Important:** Make sure your organization uses the products feature. You can't use contract line items unless you're using products. See "Products Home" in the Salesforce Help.

USER PERMISSIONS

To set up service contracts and contract line items with entitlements:

- "Manage Entitlements"
AND
"Customize Application"

Setting Up Service Contracts


To set up service contracts:

1. Enable entitlements.
 - a. From Setup, enter *Entitlement Settings* in the Quick Find box, then select **Entitlement Settings**.
 - b. Select **Enable Entitlements**.
 - c. Click **Save**.
2. Customize service contract page layouts. This lets you specify which service contract fields display to users.
 - a. From the object management settings for service contracts, go to Page Layouts.
 - b. Click **Edit** next to the page layout that you want to customize.
 - c. Customize the page as necessary and click **Save** when you're done.
3. Add the Service Contracts tab to an app. This lets users view the Service Contracts tab in a specific app.
 - a. From Setup, enter *Apps* in the Quick Find box, then select **Apps**.
 - b. Click **Edit** next to the app in which you want to add the Service Contracts tab.
 - c. Select Service Contracts from *Available Tabs* and click **Add**.
Optionally, click **Up** and **Down** to define the order in which the tab will display in the app.
 - d. Click **Save**.
4. Add the Service Contracts related list to account and contact page layouts. This lets users create, update, and verify service contracts from accounts and contacts.
 - a. From the object management settings for accounts or contacts, go to Page Layouts.
 - b. Click **Edit** next to the page layout that you want to customize.
 - c. Add the Service Contracts related list.
 - d. Click **Save**.

Setting Up Contract Line Items

To set up contract line items:

1. Customize contract line item page layouts. This lets you specify which contract line item fields display to users.
 - a. From the object management settings for contract line items, go to Page Layouts.
 - b. Click **Edit** next to the page layout that you want to customize.
 - c. Click **Save** when you're done.
2. Add the Contract Line Items related list to service contract page layouts. This lets users create, edit, and delete contract line items from service contracts.
 - a. From the object management settings for service contracts, go to Page Layouts.
 - b. Click **Edit** next to the page layout that you want to customize.
 - c. Add the Contract Line Items related list.
 - d. Click **Save**.

 **Note:** Contract line items only display to users on the Contract Line Items related list on service contracts.

Setting Up Entitlements

To set up entitlements:

1. Customize entitlement page layouts. This lets you specify which entitlement fields display to users.
 - a. From the object management settings for entitlements (from Setup, enter *Entitlements* in the *Quick Find* box), go to Page Layouts.
 - b. Click **Edit** for the page layout that you want to customize.
 - c. Click **Save** when you're done.

 **Tip:** To limit the number of cases that entitlements support, add these fields to entitlement page layouts:

Field	Description
Per Incident	Lets you limit the number of cases the entitlement supports.
Cases Per Entitlement	The total number of cases the entitlement supports.
Remaining Cases	The number of cases the entitlement can support. This field decreases in value by one each time a case is created with the entitlement.

2. Add the *Entitlement Name* lookup field to case page layouts. This lets users add entitlements to cases.
 - a. From the object management settings for cases, go to Page Layouts.
 - b. Click **Edit** next to the page layout that you want to customize.
 - c. Add the *Entitlement Name* field.
 - d. Click **Save**.
3. Add the Entitlements related list to account, contact, and asset page layouts. This lets users verify entitlements and create cases that are automatically associated with the correct entitlement, account, contact, and asset.
 - a. From the object management settings for accounts, contacts, or assets, go to Page Layouts.
 - b. Click **Edit** next to the page layout that you want to customize.
 - c. Add the Entitlements related list.
 - d. Click **Save**.
4. Add the Entitlements tab to an app. This lets users view the Entitlements tab in a specific app.
 - a. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
 - b. Click **Edit** next to the app in which you want to add the Entitlements tab.
 - c. Select Entitlements from the *Available Tabs* and click **Add**.
Optionally, click **Up** and **Down** to define the order in which the tab will display in the app.
 - d. Click **Save**.

5. Optionally, add the Cases and Contacts related lists to entitlements page layouts. This lets users:
 - View cases and contacts associated with entitlements
 - Create cases automatically associated with the correct entitlements
 - Add contacts to entitlements
 - a. From the object management settings for entitlements, go to Page Layouts.
 - b. Click **Edit** next to the page layout that you want to customize.
 - c. Add the Cases and Contacts related lists.
 - d. Click **Save**.

Creating Entitlement Templates

Entitlement templates are predefined terms of customer support that you can quickly add to products. For example, you can create entitlement templates for Web or phone support so that users can easily add entitlements to products offered to customers.

 **Note:** You can only use entitlement templates if your organization uses the products feature.

To create entitlement templates:

1. From Setup, enter *Templates* in the **Quick Find** box, then select **Templates**.
2. Click **New Template**.
3. Enter the details:

Field	Description
Entitlement Template Name	The name of the entitlement template. We recommend using a descriptive name, such as <i>Phone Support</i> . This helps users better understand entitlement templates when they see them on related lists for products.
Term (Days)	The number of days the entitlement is in effect.
Entitlement Process	The entitlement process associated with the entitlement. Entitlement processes are timelines that include all of the steps (milestones) that your support team must complete to resolve cases. Each process includes the logic necessary to determine how to enforce the correct service level for your customers.
Per Incident	Lets you limit the number of cases the entitlement supports.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To create entitlement templates:

- "Manage Entitlements"

Field	Description
Cases Per Entitlement	The total number of cases the entitlement supports. This field is only available if <code>Per Incident</code> is selected.
Business Hours	The entitlement's supported business hours.
Type	The type of entitlement, such as Web or phone support. Administrators can customize this field's values.

4. Click **Save**.

5. Customize product page layouts to add the Entitlement Templates related list.

Optionally, you can customize the Entitlement Templates related list to add the `Type` and `Business Hours` fields. This lets users view the type of entitlement, such as Web or phone support, and any business hours that apply to the entitlement.

6. Click **Save**.

CUSTOMIZING FIELDS

The following topics describe how you can customize entitlement management fields:

- [Creating Custom Fields](#)
- [Tracking Field History](#)
- [Setting Up Entitlements-Related Lookup Filters on Cases](#)

Creating Custom Fields

You can create custom fields for entitlement management that are specific to your industry or your support processes. For example, you can add unique text, picklist, and checkbox fields to entitlements, service contracts, or contract line items. See “Custom Field Types” in the Salesforce Help for a list of all the field types you can create.

To create a custom field:

1. From the object management settings for entitlements, service contracts, or contract line items, go to the fields section.
2. Click **New**.
3. Choose the type of field to create and click **Next**.
4. Enter a field label and name.
5. Enter any field attributes and click **Next**.
6. Set field-level security to determine whether the field should be visible or read only for specific profiles, and click **Next**.
7. Choose the page layouts that should display the field as editable.
8. Click **Save**.

Tracking Field History

You can select certain standard and custom fields to track on the History related list of entitlements, service contracts, and contract line items. Modifying any of these fields adds an entry to the History related list. All entries include the date, time, nature of the change, and who made the change.

 **Note:** Not all fields types are available for history tracking. See “Track Field History” in the Salesforce Help.

To set up field history tracking:

1. From the object management settings for entitlements, service contracts, or contract line items, go to the fields section.
2. Click **Set History Tracking**.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To set up which fields are tracked:

- “Customize Application”

USER PERMISSIONS

To set up which fields are tracked:

- “Customize Application”

3. Choose the fields you want tracked.
4. Click **Save**.
5. Add the History related list to the item's page layouts.

Setting Up Entitlements-Related Lookup Filters on Cases

You can set up lookup filters on cases to restrict the entitlements-related items returned. For example, when portal users create a case and select the `Entitlement Name` field, they can choose only entitlements registered to their account or contact. See "Lookup Filters" in the Salesforce Help.

To set up entitlement-related lookup filters on cases:

1. From Setup, enter `Entitlement Settings` in the `Quick Find` box, then select **Entitlement Settings**.
2. Choose the item(s) you'd like returned in the lookup fields.

USER PERMISSIONS

To set up entitlement-related lookups on cases:

- "Manage Entitlements"

Lookup Field on Cases	Click	To Return
Asset	Same account on the case	Assets registered to the account on the case. Note: To ensure that the lookup fields return all assets that share an account with the case, choose only this option.
	Same contact on the case	Assets registered to the contact on the case.
	Entitlements on the case's account	Assets associated with entitlements that belong to the case's account.
	Entitlements on the case's contact	Assets associated with entitlements related to the case's contact.
Entitlement	Active status	Entitlements with an <code>Active Status</code> .
	Same account on the case	Entitlements associated with the account on the case.
	Same asset on the case	Entitlements associated with the asset on the case.
	Same contact on the case	Entitlements associated with the contact on the case.

Choosing multiple items acts as an AND function. For example, choosing `Same account on the case` and `Same contact on the case` restricts items returned in the `Asset` field to assets registered to the account *and* contact on the case.

 **Tip:** Choose items that match how your support reps verify support eligibility. For example, choose the account-related items if your support reps verify support based on accounts.

3. Click **Save**.

ENFORCING SERVICE LEVELS

After you choose an entitlement model and set up entitlement management, you can define and enforce service levels for each of your customers. For example, you can set up entitlement management to instruct support agents to call certain people when a customer's case is unresolved after two hours.

Enforcing service levels consists of:

1. [Setting up milestones](#)
2. [Setting up the Case Milestone Detail page](#)
3. [Creating an entitlement process](#)
4. [Adding milestones to the entitlement process](#)
5. [Adding milestone actions to the entitlement process](#)
6. [Adding the entitlement process to entitlements](#)




Setting Up Milestones

Milestones are required steps in your support process. They're metrics that represent service levels to provide to each of your customers. Examples of milestones include First Response and Resolution Times on cases. See [Useful Terminology](#) on page 2 to learn how milestones work with entitlement processes to help your team resolve cases.

1. From Setup, enter *Milestones* in the **Quick Find** box, then select **Milestones**.
2. Click **New Milestone**.
3. Enter a name and description.

We recommend naming milestones after common support tasks such as *First Response Time* or *Resolution Time*. This helps users understand milestones when they view them on cases or entitlement processes.

4. Save your changes.
5. Customize case page layouts to:
 - Add these milestone fields:

Field	Description
Milestone Status	Shows a milestone's status on a case.
Milestone Status Icon	Shows a milestone's status on the case by displaying one of the following icons: <ul style="list-style-type: none">-  Compliant-  Open Violation-  Closed Violation

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS


To create milestones:

- "Manage Entitlements"
AND
"Customize Application"

- Add the Case Milestones related list. This lets users view milestones on cases.

You can add these fields to the Case Milestone related list:

Field	Description
Elapsed Time	Shows the time it took to complete a milestone. Automatically calculated to include any business hours on the case. Elapsed Time is calculated only after the Completion Date field is populated.
Start Date	The date and time that the milestone tracking started.
Time Remaining	Shows the time that remains before a milestone violation. Automatically calculated to include any business hours on the case.
Target Response	Shows the time to complete the milestone. Automatically calculated to include any business hours on the case.
Time Since Target	Shows the time that has elapsed since a milestone violation. Automatically calculated to include any business hours on the case.

-  **Tip:** You can add validation rules to case milestones so that when users update a milestone on a case, it meets the standards you specify before they can save it. For example, you can create a validation rule that ensures users select milestone completion dates that occur after case creation dates. See Validation Rules in the Salesforce Help.

Setting Up the Case Milestone Detail Page

When users are working on a case that has milestones, the milestones appear in the Case Milestones related list. Users can click a milestone to display its detail page.

1. From the object management settings for case milestones, go to Page Layouts.
2. Click **Edit** for the appropriate page layout.
3. Select which fields to add or remove from the page:

Field	Description
Completed	Icon (✓) that indicates a milestone completion.
Completion Date	The date and time the milestone was completed.
Elapsed Time	Shows the time it took to complete a milestone. Automatically calculated to include any business hours on the case. Elapsed Time is calculated only after the Completion Date field is populated.

USER PERMISSIONS

To create milestones:

- “Manage Entitlements”
- AND
- “Customize Application”

Field	Description
Entitlement Process	The entitlement process that is being used for the case. Entitlement processes are optional.
Start Date	The date and time that the milestone tracking started.
Target Date	The date and time to complete the milestone.
Target Response	Shows the time to complete the milestone. Automatically calculated to include any business hours on the case.
Time Remaining	Shows the time that remains before a milestone violation. Automatically calculated to include any business hours on the case.
Time Since Target	Shows the time that has elapsed since a milestone violation. Automatically calculated to include any business hours on the case.
Violation	Icon (🚨) that indicates a milestone violation.

- To make a field required or optional, hover over the field and click the wrench.
- Click **Save**.

Creating Entitlement Processes

Entitlement processes are timelines that include all of the steps (milestones) that your support team must complete to resolve cases. Each process includes the logic necessary to determine how to enforce the correct service level for your customers. For an example of how a case moves through an entitlement process, see the definition of an entitlement process in [Useful Terminology](#) on page 2.

You can create entitlement processes after you:

- [Choose an entitlement model](#).
- [Set up milestones](#).

You can create up to 1000 entitlement processes and include up to ten milestones in each entitlement process. Contact Salesforce for information on increasing the number of entitlement processes and milestones.

To create entitlement processes:

- From Setup, enter *Entitlement Processes* in the Quick Find box, then select **Entitlement Processes**.
- Click **New Entitlement Process**.
- Enter a name and description.
- Select **Active** to enable the process.



Tip: You may want to activate an entitlement process after you've added milestone actions to it. This is because you can't update or delete milestone actions on a process after it's activated and applied to a case.

- Choose the criteria for cases to enter and exit the entitlement process:

USER PERMISSIONS





To create and update entitlement processes:


- "Manage Entitlements"

Field	Description	Additional Actions to Take?
Case enters the process	Based on case created date Select if cases should enter the process when they're created.	No.
	Based on a custom date/time field on the case Select if you want the value of a custom date/time field on the case to determine when the case enters the process.	Yes, a drop-down list displays for selecting the custom date/time. You can only choose a custom date/time, not a custom date.
Case exits the process	Based on when case is closed Select if cases should exit the process when they're closed.	No.
	Based on custom criteria Select if cases should exit the process based on criteria you define.	Yes, select one of the following: <ul style="list-style-type: none"> Choose <code>criteria are met</code> and select the filter criteria that a case must meet for it to exit the process. For example, set a case filter to <code>Priority equals Low</code> if you want cases with the <code>Priority</code> field marked <code>Low</code> to exit the process. Choose <code>formula evaluates to true</code> and enter a formula that returns a value of "True" or "False." Salesforce triggers the rule if the formula returns "True." Choose <code>formula evaluates to true</code> and enter a formula that returns a value of "True" or "False." Cases exit the process if the formula returns "True." For example, the formula <code>(Case: Priority equals Low) AND (Case: Case Origin equals Email, Web)</code> moves cases out of the process if their <code>Priority</code> field is <code>Low</code> and the <code>Case Origin</code> field is marked <code>Email</code> or <code>Web</code>.

6. Save your changes.

7. Optionally, add these fields to case page layouts:

Field	Description
Timeline	<p>How far along a case is to reaching an entitlement process's milestones. You can click or hover your mouse pointer over each milestone to view its details. These icons represent milestones:</p> <ul style="list-style-type: none">  Completed milestone  Violated milestone <p>You can drag the Handle icon () along the Timeline Zoom tool to view past and future milestones. If an entitlement process applies to the case, this field appears.</p> <p>When adding the <code>Timeline</code> field to case page layouts, click the wrench icon () next to it and select <code>Show label</code> so the field name displays on cases.</p>
Entitlement Process Start Time	<p>The time the case entered an entitlement process. If you have "Edit" permission on cases, you can update or reset the time. When you reset the time:</p> <ul style="list-style-type: none"> Closed or completed milestones aren't affected Incomplete milestones are recalculated based on the new start time
Entitlement Process End Time	The time a case exited an entitlement process.
Stopped	Lets you stop an entitlement process on a case, which might be necessary if you're waiting for a customer's response.
Stopped Since	Shows the date and time an entitlement process was stopped on a case.

 **Note:** If you have entitlement versioning enabled, you can create different versions of an entitlement process as your business needs and procedures change. See "Entitlement Versioning Overview" in the Salesforce Help.

Adding Milestones to Entitlement Processes

Milestones are required steps in your support process. They're metrics that represent service levels to provide to each of your customers. Examples of milestones include First Response and Resolution Times on cases. Use milestones in entitlement processes to enforce the steps in your support process.

You can add milestones to entitlement processes after you:

1. [Choose an entitlement model.](#)
2. [Set up milestones.](#)

USER PERMISSIONS

To add milestones to entitlement processes:

- "Manage Entitlements"

3. Set up entitlement processes.

To add milestones to entitlement processes:

1. From Setup, enter *Entitlement Processes* in the Quick Find box, then select **Entitlement Processes**.
2. Click the name of an entitlement process.
3. Click **New** on the Milestones related list.
4. Choose the milestone.
5. In **Time Trigger (Minutes)**, enter the number of minutes in which users need to complete the milestone before it triggers an action.

Or, if you'd like the trigger time for the milestone to be calculated dynamically based on the milestone type and properties of the case, click **Enable Apex Class for the Time Trigger (Minutes)**.

 **Note:** You must have a custom Apex class that implements the `Support.MilestoneTriggerTimeCalculator` Apex interface to use the Enable Apex Class for the Time Trigger (Minutes) option.

6. Enter the order in which to process the milestone if a case matches the criteria of more than one milestone in an entitlement process. Use this if you have similar milestones, such as first response and first response with a case `Priority` of high.

Cases can only match one milestone at a time in an entitlement process.

7. Enter the criteria a case must match for the milestone to apply to it:


- Choose `criteria are met` and select the filter criteria that a case must meet for a milestone to apply to it. For example, set a case filter to `Priority equals High` if you want the milestone to apply to cases with the `Priority` field marked High.




Choose `formula evaluates to true` and enter a formula that returns a value of "True" or "False." Salesforce triggers the rule if the formula returns "True."

- Choose `formula evaluates to true` and enter a formula that returns a value of "True" or "False." The milestone applies to cases if the formula returns "True." For example, the formula `(Case: Priority equals High) AND (Case: Case Origin equals Email, Web)` applies the milestone to cases where the `Priority` field is High and the `Case Origin` field is marked Email or Web. Note that you can't use the `Case Owner` field in formulas.

8. Save your changes.

9. Optionally, add the Milestones related list to entitlements page layouts. This lets users view milestones on entitlements.

 **Note:** The `Timeline` field shows you any milestones added to the entitlement process:

-  The Milestone icon () represents milestones.
- Click or hover your mouse pointer over each milestone to view its details.
- Drag the Handle icon () along the Timeline Zoom tool to view past and future milestones.

Adding Milestone Actions to Entitlement Processes

Milestone actions are time-dependent workflow actions that occur at every step (milestone) in an entitlement process. Examples of milestone actions include sending email alerts to specified users an hour before a first response is near violation or automatically updating certain fields on a case one minute after a first response successfully completes. See the definition of milestone actions in [Useful Terminology](#) on page 2 for the types of actions and automated processes you can add to milestones.


Before you can add milestone actions to entitlement processes, you must:

1. [Choose an entitlement model.](#)
2. [Set up milestones.](#)
3. [Set up entitlement processes.](#)
4. [Add milestones to entitlement processes.](#)

To add milestone actions to entitlement processes:

1. From Setup, enter *Entitlement Processes* in the **Quick Find** box, then select **Entitlement Processes**.
2. Click the name of an entitlement process.
3. Click the name of a milestone on the Milestone related list.
4. Add actions to the milestone:

Click Add Workflow Action and Select	To	Example
New Task	Create a workflow task	Create a task for a support rep to call a customer when a first response is violated.
New Email	Create an email alert	Notify case owners when their cases are near violation of a first response.
New Field Update	Define a field update	Update the case <i>Priority</i> field to <i>High</i> when a first response is near violation.
New Outbound Message	Define an outbound message	Send data about parts or services to an external system after a first response is successful.
Select Existing Action	Select an existing action	Use an existing email alert to notify a case owner when their case is near violation of a first response.

 **Note:** To make warning and violation actions time-dependent, add a time trigger first. The time trigger for success actions is the time trigger on the milestone.

The **Add Workflow Action** button initially displays on the Success Actions section. It displays in the Warning Actions and Violation Actions sections after you add time triggers to them.

- Click **Add Time Trigger** to add a time trigger to the milestone.

Time-triggered actions only occur during your organization's business hours.

USER PERMISSIONS

To add milestone actions to entitlement processes:

- "Manage Entitlements"
AND
"Customize Application"

- Click **Add Workflow Action** under a time trigger to add time-dependent actions.
You can add up to ten actions and ten time triggers to each type of milestone action.

Optionally:

- Click **Edit** next to any action or time trigger to modify it.
- Click **Remove** next to any action to remove it from the entitlement process. This removes the milestone action from the entitlement process but does not delete the milestone action.
- Click **Delete** next to any time trigger to remove it from the milestone. This deletes the time trigger and removes its actions from the entitlement process but does not delete the milestone actions. The actions are still available when you click **Add Workflow Action** and choose **Select Existing Action**.

Adding Entitlement Processes to Entitlements

Entitlement processes only apply to cases with assigned entitlements.

1. Add an entitlement process to an entitlement.
 - a. Edit an entitlement.
 - b. Select an entitlement process from the `Entitlement Process` field.
 - c. Save your changes.
2. Add the entitlement to the case.
 - a. Edit a case.
 - b. Select the entitlement from the `Entitlement Name` field.
 - c. Save your changes.

USER PERMISSIONS

To view entitlements:

- "Read" on entitlements

To change entitlements:

- "Edit" on entitlements

UPDATING ENTITLEMENT PROCESSES

Entitlement versioning lets you make changes to existing entitlement processes, even if they're assigned to active entitlements and cases. This can be useful if the business rules behind your entitlement processes change, for example, or if you need to create multiple versions of the same entitlement process that have only minor differences. With entitlement versioning, you don't need to create entirely new processes; you can simply create new versions of existing ones.

When you create a new version of an entitlement process, you can change any of the following:

- Name
- Description
- Whether the process is active
- Whether the version is the default
- Entry criteria
- Exit criteria

You can also add notes about the version. This makes it easy to differentiate between multiple versions of the same process, especially if they have the same name.

On new versions of entitlement processes that are currently in use, you can add new milestones, but can't edit existing ones. On new versions of processes that aren't currently in use, you can both add new milestones and edit existing ones.

Once you've created a new version of an entitlement process, you can choose to apply it to all entitlements and cases assigned to the previously used version, or only to new entitlements and cases.

Enabling Entitlement Versioning

1. From Setup, enter *Entitlement Settings* in the **Quick Find** box, then select **Entitlement Settings**.
2. Select **Enable Entitlement Versioning**.
Once you enable entitlement versioning, you can't disable it, even if you disable entitlement management.
3. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To enable entitlement versioning:

- "Manage Entitlements"

Creating New Versions of Entitlement Processes

▶ [Watch a Demo](#) (2:20 minutes)

Entitlement versioning lets you make changes to existing entitlement processes, even if they're assigned to active entitlements and cases. This can be useful if the business rules behind your entitlement processes change, for example, or if you need to create multiple versions of the same entitlement process that have only minor differences. With entitlement versioning, you don't need to create entirely new processes; you can simply create new versions of existing ones.

Before you can create new versions of entitlement processes, you need to [enable entitlement versioning](#).

To create a new version of an entitlement process:

1. From Setup, enter *Entitlement Processes* in the **Quick Find** box, then select **Entitlement Processes**.
2. Click the name of the entitlement process for which you want to create a new version.
3. In the Entitlement Process Versions list, click the version of the process from which you want to create a new version.
4. On the Entitlement Process Detail page, click **Create New Version**.

5. Specify the information for the new version.

We recommend using the Version Notes field to include details about what makes the version you're creating different from others. This makes it easier to differentiate between multiple versions of the same entitlement process.

6. Click **Save**.

On new versions of entitlement processes that are currently in use, you can add new milestones, but can't edit existing ones. On new versions of processes that aren't currently in use, you can both add new milestones and edit existing ones.

Once you've created a new version of an entitlement process, you can choose to apply it to all entitlements and cases assigned to the previously used version, or only to new entitlements and cases.

Using New Versions of Entitlement Processes

▶ [Watch a Demo](#) (2:20 minutes)

Once you've created a new version of an entitlement process, you can choose to apply it to all entitlements and cases assigned to the previously used version, or only to new entitlements and cases.

To apply it to a new entitlement (and, by extension, cases with that entitlement), simply choose it from the Entitlement Process lookup field when you create the entitlement.

To apply a new entitlement process to cases and entitlements assigned to a previously used version of the process, follow these steps:

1. From Setup, enter *Entitlement Processes* in the **Quick Find** box, then select **Entitlement Processes**.

2. Click the name of the entitlement process you want to work with.

The list on the main Entitlement Processes page shows the default version of each process. Click the name of a process to see a list of all available versions of it.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To create and update entitlement processes:

- "Manage Entitlements"

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To create and update entitlement processes:

- "Manage Entitlements"

3. On the detail page for the entitlement process, click the name of the version you want to update cases and entitlements to.
4. Click **New Update Rule**.
5. Choose the version of the entitlement process you want to update from.
You can update from any other version of the process, whether or not it's active.
6. To prevent milestone warning and violation actions from being triggered on cases to which warnings or violations will newly apply after the update, select **Don't Trigger New Milestone Warnings and Violations**.
7. Click **Save**.
The update rule detail page shows the estimated number of entitlements and cases that will be updated.
8. Click **Start** to begin the update process.

Throughout the update process, the update rule detail page will refresh to show the number of entitlements and cases processed. To stop the update at any time, click **Stop**.

GIVING USERS ACCESS TO ENTITLEMENT MANAGEMENT

After you set up entitlement management, you can let users access the feature. Users must have:

- [Specific user permissions](#)
- [Access to the appropriate fields](#)
- [Access to the appropriate tabs](#)

Verify User Permissions

The following user permissions control access to different features in entitlement management:

Users Who Will	Need These Permissions	Permissions Are Automatically Enabled on These Standard Profiles
Set up entitlement management, including milestones, entitlement processes, and entitlement templates	“Manage Entitlements” AND “Customize Application”	System Administrator
Provide entitlement management to a Customer Portal	“Customize Application” AND “Manage Users” and “Edit Self-Service Users”	System Administrator
Provide entitlement management to a partner portal	“Customize Application” AND “Manage Users”	System Administrator
Create or update custom report types that include entitlement management	“Manage Custom Report Types”	System Administrator
Create and run reports based on entitlement management custom report types	“Create and Customize Reports”	Read Only, Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Create cases with entitlements	“Create” on cases AND “Read” on entitlements	Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud


USER PERMISSIONS

To create and edit users:

- “Manage Internal Users”

Giving Users Access to Entitlement Management

Users Who Will	Need These Permissions	Permissions Are Automatically Enabled on These Standard Profiles
Change entitlements on cases	“Edit” on cases AND “Read” on entitlements	Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Verify or view entitlements	“Read” on entitlements	Read Only, Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Create entitlements	“Create” on entitlements	None: enable the permission in a permission set or custom profile
Change entitlements	“Edit” on entitlements	None: enable the permission in a permission set or custom profile
View entitlement contacts	“Read” on entitlement contacts	Read Only, Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Change entitlement contacts	“Create” on entitlement contacts AND “Delete” on entitlement contacts	None: enable the permissions in a permission set or custom profile
Verify or view service contracts	“Read” on service contracts	Read Only, Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Create service contracts	“Create” on service contracts	None: enable the permission in a permission set or custom profile
Change service contracts	“Edit” on service contracts	None: enable the permission in a permission set or custom profile
Verify or view contract line items	“Read” on contract line items	Read Only, Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Add contract line items to service contracts:	“Edit” on service contracts AND “Create” on contract line items and “Read” on products and price books	None: enable the permissions in a permission set or custom profile
Change contract line items on service contracts	“Edit” on service contracts AND “Edit” on contract line items and “Read” on products and price books	None: enable the permissions in a permission set or custom profile

 **Tip:** If a user permission isn't on a standard profile you need to use, create a permission set and enable the permission in it, or clone the standard profile and enable the permission in the custom profile.

Set Field-Level Security

Choose which entitlement management fields users can view and edit. Field-level security settings let you specify users' access to fields on detail and edit pages, related lists, list views, reports, search results, email and mail merge templates, and portals.

You can set field-level security from a permission set, profile, or a particular field.

Make the Entitlements and Service Contracts Tabs Visible

Entitlement management has two tabs: the Entitlements tab, where users can create and manage entitlements, and the Service Contracts tab, where users can create and edit service contracts and contract line items (if contract line items are set up). You can create a custom app with these tabs or instruct your users to add the tabs to an existing tab set. Only users with the "Read" permission on entitlements will see the Entitlements tab and only users with the "Read" permission on service contracts will see the Service Contracts tab. Contract line items display on the Service Contracts tab for users who have the "Read" permission on contract line items.

SEE ALSO:

[Salesforce Help: Field-Level Security Overview](#)

PROVIDING ENTITLEMENT MANAGEMENT IN THE CUSTOMER PORTAL

User Permissions Needed

To set up and update the Customer Portal	"Customize Application"
To create and edit profiles:	"Manage Profiles and Permission Sets"
To manage Customer Portal users:	"Edit Customer Portal Users"



EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

You can use the Customer Portal to provide your customers with access to their entitlements and service contracts. Contract line items don't display in the Customer Portal.

After you have set up entitlement management and the Customer Portal in your organization, complete the following steps to make entitlement management visible to portal users. For instructions on setting up the Customer Portal and managing profiles, see the Salesforce online help.

1. Update Customer Portal profiles:
 - a. Clone Customer Portal profiles to include the "Read" permission on entitlements or service contracts.
 **Note:** High-volume portal users can't access entitlement management.
 - b. Optionally, on the profiles of delegated Customer Portal user administrators, include the "Create" and "Delete" permissions on entitlement contacts. This lets delegated portal user administrators update entitlement contacts. For more information on delegated portal user administrators, see "Delegating Customer Portal User Administration and Portal Super User" in the Salesforce Help.
 - c. In the cloned profiles, verify that the tab visibility for the Entitlements or Service Contract tabs are Default On.
2. Activate the new profiles:
 - a. From Setup, enter *Customer Portal Settings* in the Quick Find box, then select **Customer Portal Settings**.
 - b. Click the name of the Customer Portal to open the detail page.
 - c. In the Assigned Profiles related list, click **Edit Profiles** and activate the new profiles.
 - d. Click **Save**.
3. Add the `Entitlement Name` field to case page layouts assigned to portal users. This lets portal users add entitlements to cases.
 - a. From Setup, enter *Cases* in the Quick Find box, then select **Page Layouts**.
 - b. Click **Edit** next to a page layout.
 - c. Add the `Entitlement Name` field.
 - d. Click **Save**.
 **Tip:** Don't add the following entitlement process fields to case page layouts for portal users because portal users shouldn't access information related to your internal support processes: `Entitlement Process Start Time`, `Entitlement Process End Time`, `Stopped`, and `Stopped Since`.

Providing Entitlement Management in the Customer Portal

4. Optionally, add the Entitlements related list to account and contact page layouts assigned to delegated portal user administrators. This lets delegated portal user administrators create cases automatically associated with the right entitlements.
 - a. From the object management settings for accounts or contacts, find Page Layouts.
 - b. Click **Edit** next to a page layout.
 - c. Add the Entitlements related list.
 - d. Click **Save**.
5. Add the Entitlements or Service Contracts tab to each Customer Portal:
 - a. On the Customer Portal detail page, click **Customize Portal Tabs**.
 - b. Select the Entitlements or Service Contracts tab in Available Tabs and click the **Add** arrow to move the tab into the Selected Tabs box. To change the order of the tabs, use the **Up** or **Down** arrows.
 - c. Click **Save**.
6. Assign the cloned profiles to your Customer Portal users:
 - a. Display the contact detail page.
 - b. To create a new Customer Portal user, choose **Enable Customer User** from the **Manage External User** drop-down button. To update an existing user, click **View Customer User**.
 - c. For a new user, select the cloned profile from the **Profile** drop-down menu. For an existing user, click **Edit** and then select the profile.
 - d. Click **Save**.

PROVIDING ENTITLEMENT MANAGEMENT IN THE PARTNER PORTAL

User Permissions Needed

To set up and update the partner portal:	"Customize Application"
To create and edit profiles:	"Manage Profiles and Permission Sets"
To manage portals:	"Manage Users"

EDITIONS


Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

You can use the partner portal to provide your partners with access to entitlements, service contracts, or contract line items.

After you have set up entitlement management and the partner portal in your organization, complete the following steps to make entitlement management visible to portal users. For instructions on setting up the partner portal and managing profiles, see the Salesforce online help.

1. Update Partner User profiles:
 - a. Clone the Partner User profiles to include the "Read" user permission on entitlements, service contracts, or contract line items.
 - b. Optionally, on the profiles of delegated partner user administrators, include the "Create" and "Delete" permissions on entitlement contacts. This lets delegated partner user administrators update entitlement contacts. For more information on delegated partner user administrators, see "Delegating Partner User Administration" in the Salesforce Help.
 - c. In the cloned profiles, verify that the tab visibility for the Entitlements or Service Contract tab is Default On.
2. Activate the new profile:
 - a. From Setup, enter *Partners* in the **Quick Find** box, then select **Settings**.
 - b. Select a partner portal.
 - c. In the Assigned Profiles related list, click **Edit Profiles** and activate the new profile.
 - d. Click **Save**.
3. Optionally, add the **Entitlement Name** field to case page layouts assigned to portal users. This lets portal users add entitlements to cases.
 - a. From Setup, enter *Cases* in the **Quick Find** box, then click **Page Layouts**.
 - b. Click **Edit** next to a page layout.
 - c. Add the **Entitlement Name** field.
 - d. Click **Save**.

 **Tip:** Don't add the following entitlement process fields to case page layouts for portal users because portal users shouldn't access information related to your internal support processes: **Entitlement Process Start Time**, **Entitlement Process End Time**, **Stopped**, and **Stopped Since**.
4. Optionally, add the Entitlements related list to account and contact page layouts assigned to delegated partner user administrators. This lets delegated partner user administrators create cases automatically associated with the right entitlements.
 - a. From the object management settings for accounts or contacts, find Page Layouts.

Providing Entitlement Management in the Partner Portal

- b. Click **Edit** next to a page layout.
 - c. Add the Entitlements related list.
 - d. Click **Save**.
5. Add the Entitlements or Service Contracts tab to each partner portal:
 - a. On the partner portal detail page, click **Customize Portal Tabs**.
 - b. Select the Entitlements or Service Contracts tab in Advanced Tabs and click the **Add** arrow to move the tab into the Selected Tabs box. To change the order of the tabs, use the **Up** and **Down** arrows.
 - c. Click **Save**.
6. Assign the cloned profiles to your partner portal users:
 - a. Display the contact detail page.
 - b. To create a new partner portal user, click **Manage External User**, then **Enable Partner User**. To update an existing user, click **View Partner User**.
 - c. For a new user, select the cloned profile from the **Profile** drop-down menu. For an existing user, click **Edit** and then select the profile.
 - d. Click **Save**.

REPORTING ON ENTITLEMENT MANAGEMENT

You can use custom report types to define report criteria from which users can run and create reports on entitlements, service contracts, and contract line items. After you set up entitlement management, the following custom report types are automatically included in your organization:

Custom Report Type	Description	Report Type Location
Accounts with entitlements with contacts	Lists accounts with entitlements that include contacts (named callers).	Accounts & Contacts
Service contracts with contract line items	Lists service contracts with contract line items (products).	Customer Support Reports
Service contracts with entitlements	Lists service contracts with entitlements.	Customer Support Reports

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Users with the “Create and Customize Reports” permission can click **Create New Custom Report** on the Reports tab to run a report based on any of the above custom report types. Additionally, users can report on cases with milestones by selecting the cases with milestones report type under Customer Support Reports. However, you can't customize this report type.

To customize entitlement management custom report types:

1. From Setup, enter *Report Types* in the *Quick Find* box, then select **Report Types**.
2. From the All Custom Report Types page, you can:
 - Define a new custom report type by clicking **New Custom Report Type**.
You can't select entitlements as a primary object.
 - Update a custom report type's name, description, report type category, and deployment status by clicking **Edit** next to a custom report type's name.
 - Delete a custom report type by clicking **Del** next to the custom report type's name. All the data stored in the custom report type will be deleted and cannot be restored from the Recycle Bin.
 - Display detailed information about a custom report type and customize it further by clicking a custom report type's name.

 **Note:** For information on reports and custom report types, see “Set Up a Custom Report Type” in the Salesforce Help.

ENTITLEMENT MANAGEMENT NOTES, LIMITATIONS, AND BEST PRACTICES

Notes and Limitations

- You can only use contract line items if your organization uses products.
- You can't create list views for contract line items.
- You can't share entitlements. If an entitlement has an account, its sharing is inherited from account sharing.
- You can't share contract line items. Sharing for contract line items is inherited from service contract sharing. For example, users with the "Read" permission on service contracts inherit the "Read" permission on contract line items.
- If you want your customers or partners to access their entitlements or service contracts, add entitlements or service contracts to your portals.

Don't add the following entitlement process fields to case page layouts for portal users because portal users shouldn't access information related to your internal support processes: `Entitlement Process Start Time`, `Entitlement Process End Time`, `Stopped`, and `Stopped Since`.




- If you use the `Per Incident` field to limit the number of cases entitlements support, we recommend setting field-level security on the `Cases Per Incident` and `Remaining Cases` fields to read-only for users who shouldn't modify per incident support.
- Entitlements don't automatically apply to cases created with Web-to-Case or Email-to-Case. If needed, you can add entitlements to these features using Apex code.
- You can't add milestones to cases without using entitlement processes. Entitlement processes apply milestones to cases.
- Merge fields for entitlements on cases aren't supported. For example, if you add the `Entitlement Name` `{!Case.Entitlement}` merge field to an email template, the field is not populated on the template.

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Best Practices

- Set up lookup filters on cases to restrict the entitlements-related items returned. For example, when portal users create a case and select the `Entitlement Name` field, they can choose only entitlements registered to their account or contact.
- Use Apex code to automatically mark milestones as Completed on cases that match unique criteria. For example, you can create an Apex trigger on `EmailMessage` that marks a first response milestone as Completed on cases when support reps send email from cases.
- Use the Mass Transfer Tool to transfer multiple service contracts from one user to another.
- Customize the values for the `Type` field on entitlements to match the types of entitlements your team provides or sells, such as Web support or online training.
- Add the `Status Icon` field to entitlements, service contracts, and contract line items page layouts so that users can easily see one of these three statuses:
 -  Active
 -  Expired
 -  Inactive

Entitlement Management Notes, Limitations, and Best Practices

Additionally, you can add fields to page layouts.

- Use sharing rules to give users access to service contracts they don't own; you can't extend the organization-wide default sharing model for service contracts.
- If you use products, set up entitlement templates to predefine terms of support that users can add to products.
- Set up entitlement processes to enforce all the steps that your support team must complete to resolve cases.
- If you're not using entitlement versioning, we recommend activating entitlement processes *after* you've added milestone actions to them. This is because you can't update or delete milestone actions on a process after it's activated and applied to a case. We recommend creating new entitlement processes to replace existing, active ones applied to cases.
- If you're using entitlement versioning, you can update existing entitlement processes, even when they're assigned to active entitlements and cases.
- You can create up to 1000 entitlement processes and include up to ten milestones in each entitlement process. Contact Salesforce for information on increasing the number of entitlement processes and milestones.
- Use custom report types to define report criteria from which users can run and create reports on entitlements and service contracts.
- You can view cases with milestones by creating case list views that filter on milestone fields.
- Use the entitlement process queue to view or cancel active entitlement process actions.
- You can add validation rules to case milestones so that when users update a milestone on a case, it must meet the standards you specify before they can save it. For example, you can create a validation rule that ensures users select milestone completion dates that occur after case creation dates.

SEE ALSO:

[Salesforce Help: Validation Rules](#)