

**BUSINESS REQUIREMENTS DOCUMENT — VERSION 2.0**

# **SLA Command Centre**

Service Cloud Implementation — Sai Dance Academy

---

Client: Sai Dance Academy  
Prepared by: Supriya Nagesh  
Date: May 2026  
Version: 2.0 — Updated post-build  
Project Code: SLA-COMMAND

## Version History

Version	Date	Changes	Author
1.0	May 2026	Initial draft — pre-build	Supriya Nagesh
2.0	May 2026	Updated post-build: SLA Health formula updated to First Response, Auto-Entitlement Flow added, Milestone Completion Flow removed, Known Issues section added, Escalation Rule criteria updated, Acceptance Criteria revised	Supriya Nagesh

## 1. Executive Summary

Sai Dance Academy is a growing performing arts organisation operating across three locations. As student enrolment increases, so does the volume of parent and student support requests managed through Salesforce Service Cloud. The support team had no visibility into which cases were approaching their SLA deadlines — resulting in missed response times, escalated complaints, and frustrated parents.

This document defines the business requirements for the SLA Command Centre — a fully declarative Service Cloud implementation providing real-time SLA visibility, automated early-warning alerts, escalation flows, and a live dashboard. It has been updated post-build to reflect all configuration decisions, limitations discovered, and changes made during implementation.

## 2. Business Context

### 2.1 About the Client

Field	Detail
Organisation	Sai Dance Academy
Industry	Performing Arts / Dance Education
Locations	3 branches
CRM Platform	Salesforce — Service Cloud (existing org)
Key Stakeholder	Priya — Operations Manager
Project Sponsor	Academy Director

## 2.2 Business Problem

The academy admin and support team manage a high volume of parent and student requests daily across three case types:

- Payment issues and fee disputes
- Enrollment queries and schedule changes
- Costume orders, recital coordination, and general feedback

A recent incident illustrated the cost of this gap: a parent's payment error case sat unresolved for four days. By the time the team responded, the parent had shared their frustration publicly on social media — causing reputational damage to the academy.

## 2.3 Business Goals

#	Goal	Success Metric
1	Real-time SLA visibility on every case record	SLA Health field adopted by 100% of support team
2	Alert agents before SLA breach — not after	Warning Action fires at 75% SLA usage every time
3	Notify Operations Manager automatically on escalation risk	Zero manual escalation handoffs
4	Reduce overall SLA breach rate	60% reduction within 30 days of go-live
5	Eliminate daily manual report runs by managers	Zero manual report pulls needed

### 3. Stakeholders

Name / Role	Department	Interest in Project
Priya (Operations Manager)	Operations	Primary stakeholder. Wants manager-level visibility and automatic escalation notifications.
Support Agents (x3)	Customer Support	End users. Need SLA Health field on case records and timely alert emails.
Academy Director	Executive	Cares about parent satisfaction and reputational risk reduction.
Supriya Nagesh	Salesforce Consultant	Implementing the solution. Responsible for all configuration, testing, and documentation.

### 4. SLA Tiers

The system supports three case priority levels. Priority picklist values were customised from Salesforce defaults (High/Medium/Low deactivated) to Urgent/Standard/General to align with academy terminology. Each tier has distinct SLA windows tracked by the SLA Health formula field against the First Response milestone.

Priority	Typical Case Types	First Response	Resolution	At Risk	Breached	SF Process
<b>Urgent</b>	Payment failures, access issues	4 hours	8 hours	3 hrs	4 hrs	SDA_Urgent_SLA
<b>Standard</b>	Enrollment, schedule changes	24 hours	48 hours	18 hrs	24 hrs	SDA_Standard_SLA
<b>General</b>	Feedback, newsletter requests	48 hours	120 hours	36 hrs	48 hrs	SDA_General_SLA

*Note: SLA Health formula tracks the First Response window. At Risk = 75% of First Response elapsed. Breached = First Response window expired.*

## 5. Functional Requirements

ID	Category	Requirement	Priority
FR-01	SLA Tracking	System must track First Response and Resolution milestones per case priority using Salesforce Entitlements & Milestone Processes	Must Have
FR-02	Alerting	Automated email alert to assigned agent when case reaches 75% of First Response SLA window via Milestone Warning Actions	Must Have
FR-03	Visibility	Formula field SLA Health on Case record showing live status based on First Response window: On Track (<75%), At Risk (75%+), Breached (100%+), Escalated, Closed	Must Have
FR-04	Escalation	Cases open beyond threshold hours (Status = New only) must auto-reassign to Operations queue and notify Operations Manager	Must Have
FR-05	Automation	Auto-Entitlement Assignment Flow must assign correct Entitlement to every new case based on Priority — no hardcoded IDs	Must Have
FR-06	Dashboard	Real-time Service Cloud dashboard showing open cases by milestone status, breach risk by owner, 30-day compliance trend	Must Have
FR-07	Reporting	Historical SLA breach report by priority, owner, and week for coaching and process improvement	Should Have
FR-08	Access	Dashboard visible to all agents (view only); edit access restricted to System Admin	Must Have
FR-09	Case Intake	Email-to-Case to be configured as a future enhancement (Stage 6) to auto-create cases from parent emails to support@saidanceacademy.com	Future Phase

## 6. Non-Functional Requirements

- No custom Apex code — solution must be 100% declarative
- No third-party apps or AppExchange packages required
- SLA Health formula field must reflect case status without manual refresh
- Alert emails must be delivered within 5 minutes of threshold being crossed
- Solution built within existing Sai Dance Academy Salesforce org — no new org required
- Escalation Rules must include Status = New criteria to prevent alerts firing on closed cases
- Auto-Entitlement Flow must use Get Records — no hardcoded Record IDs



## 7. Solution Components Summary

#	Component	Purpose	Stage / Status
1	Entitlements & Entitlement Processes	Define SLA windows per priority tier (3 processes)	Stage 1 <input checked="" type="checkbox"/>
2	Milestones — First Response & Resolution	Track SLA checkpoints per case. Locked after first use — cannot be edited retroactively	Stage 1 <input checked="" type="checkbox"/>
3	Milestone Warning Actions	Fire 75% alert emails to assigned agents on all 6 milestones across 3 processes	Stage 2 <input checked="" type="checkbox"/>
4	Email Alert — SLA Warning Alert	Email template and alert triggered by Warning Actions. Tested end-to-end	Stage 2 <input checked="" type="checkbox"/>
5	Formula Field — SLA Health	Visual SLA status indicator on every Case record. Tracks First Response window using ISPICKVAL()	Stage 2 <input checked="" type="checkbox"/>
6	Custom Field — SLA_Alert_Sent__c	Checkbox reserved for future duplicate alert guard via Apex	Stage 2 <input checked="" type="checkbox"/>
7	Auto-Entitlement Assignment Flow	Record-Triggered Flow assigns correct Entitlement on case creation. Uses Get Records — no hardcoded IDs	Stage 5 <input checked="" type="checkbox"/>
8	Escalation Rules	Auto-reassign and notify manager. Status = New criteria prevents closed case triggers	Stage 3 <input checked="" type="checkbox"/>
9	Reports & Dashboard	3-component real-time SLA dashboard. Running user = Operations Manager	Stage 4 <input checked="" type="checkbox"/>
10	Milestone Completion Flow	NOT BUILT — MilestoneName field not accessible via Flow on CaseMilestone object. Apex required. Documented as future enhancement	Not Built — Apex Required
11	Email-to-Case	Auto-create cases from parent emails to support@saidanceacademy.com	Stage 6 — Future

## 8. Out of Scope

- Customer-facing portal or Experience Cloud site
- Web-to-Case (covered under a separate portfolio project)
- Live chat or omni-channel routing
- Integration with external helpdesk tools
- Custom Apex triggers or Visualforce pages — except where noted as future enhancements
- Mobile app configuration
- Milestone completion automation via Flow — Salesforce platform limitation. MilestoneName not accessible on CaseMilestone object in Flow Builder. Requires Apex.
- Duplicate alert guard via Flow — MilestoneStatus not accessible on Case object in Flow Builder. Requires CaseMilestone-triggered Flow or Apex.

## 9. Assumptions & Constraints

### 9.1 Assumptions

- Salesforce org has Service Cloud enabled
- Entitlements feature enabled in org settings
- Cases are being logged in Salesforce by the support team
- Assigned agents have valid email addresses in Salesforce
- Operations Manager (Priya) has a Salesforce licence and can receive alert emails
- Standard pre-existing Entitlement Process in org left inactive — no impact on custom processes
- Milestones become locked after first use on a case — this is expected Salesforce behaviour and cannot be changed
- Priority picklist rebuilt: High/Medium/Low deactivated. Urgent/Standard/General added as custom values

### 9.2 Constraints

- Build completed within 2-week sprint cycle
- No budget for additional Salesforce licences or paid AppExchange apps
- Solution built directly in dev org — no sandbox-to-production deployment
- MilestoneName field not accessible via Flow Builder on CaseMilestone object — prevents declarative milestone completion automation
- MilestoneStatus field not accessible on Case object in Flow — prevents Case-triggered duplicate guard Flow
- Urgent Resolution milestone uses explicit 24/7 Business Hours instead of default setting — result of milestone being locked after first use. Functionally equivalent for Urgent cases.
- SDA\_Urgent\_SLA\_Test process created for testing — to be deactivated post-testing



## 10. Known Issues & Decisions Made

This section documents key decisions made during the build and known limitations discovered. This level of transparency reflects real-world implementation practice.

#	Type	Issue / Decision	Resolution / Rationale
1	Decision	Dropped duplicate alert guard Flow	MilestoneStatus not accessible on Case in Flow. SLA Health formula provides equivalent real-time visibility. Duplicate guard documented as Apex enhancement.
2	Limitation	Milestone completion cannot be automated declaratively	MilestoneName not accessible on CaseMilestone in Flow. Salesforce recommends Apex. Documented as future enhancement. Core SLA tracking unaffected.
3	Decision	SLA Health formula updated to track First Response not Resolution	First Response is the most critical SLA checkpoint for parent satisfaction. Tighter 4-hour window more meaningful for agents to act on.
4	Decision	Explicit 24/7 Business Hours on Urgent Resolution milestone	Milestone locked after first case use. Cannot edit. Set to explicit 24/7 which is functionally identical to default for Urgent cases.
5	Decision	Status = New added to all Escalation Rule entries	Without this, escalation rules were firing on closed cases causing duplicate alerts. Status = New is standard best practice in production orgs.
6	Decision	Priority picklist rebuilt from High/Medium/Low to Urgent/Standard/General	Aligns with academy terminology and SLA design. Old values deactivated to prevent accidental use.
7	Decision	Auto-Entitlement Flow uses Get Records not hardcoded IDs	Hardcoding Record IDs breaks on org refresh or production migration. Get Records is production-safe and maintainable.
8	Known Issue	Warning emails land in spam in dev org	Expected behaviour in Salesforce dev orgs. Emails from Salesforce should be whitelisted in production. Tested and confirmed working.

## 11. Acceptance Criteria

The project is considered complete when all of the following can be demonstrated live in the Salesforce org:

1. New case auto-assigned correct Entitlement based on Priority without any agent action
2. A test Urgent case shows SLA Health = On Track immediately after creation
3. SLA Health changes to At Risk when 75% of the First Response window has elapsed (3 hours for Urgent)
4. SLA Health changes to Breached when the full First Response window has elapsed (4 hours for Urgent)
5. Warning Action email alert received by assigned agent at 75% of milestone window
6. Escalation Rule does not fire on cases with Status != New
7. Operations Manager receives escalation notification without any manual action
8. Escalated case shows SLA Health = Escalated on the case record
9. Service Cloud dashboard loads with live case data — no manual refresh needed
10. A closed case shows SLA Health = Closed
11. Agent user can view dashboard but cannot edit it

## 12. Future Enhancements

#	Enhancement	Description	Priority
1	Email-to-Case (Stage 6)	Auto-create cases from parent emails to support@saidanceacademy.com	High
2	Milestone Completion via Apex	Apex trigger on CaseMilestone to auto-complete milestones when Case Status changes. Required due to Flow Builder field access restrictions on CaseMilestone object.	Medium
3	Duplicate Alert Guard via Apex	Apex trigger using SLA_Alert_Sent__c checkbox to prevent duplicate Warning Action emails. Custom field already created and ready.	Medium
4	Rebuild SDA_Urgent_SLA_V2	Clean rebuild of Urgent Entitlement Process with correct default Business Hours settings before production deployment	Low
5	Recurring Check-in Milestone	24-hour recurring milestone for long-running General cases to ensure regular parent updates	Low
6	Experience Cloud Portal	Self-service portal for parents to log and track their own cases	Future

### 13. Document Sign-Off

Role	Name	Date
Operations Manager	Priya	
Salesforce Consultant	Supriya Nagesh	
Academy Director		