How to configure an SLA in Dynamics 365 for lead records

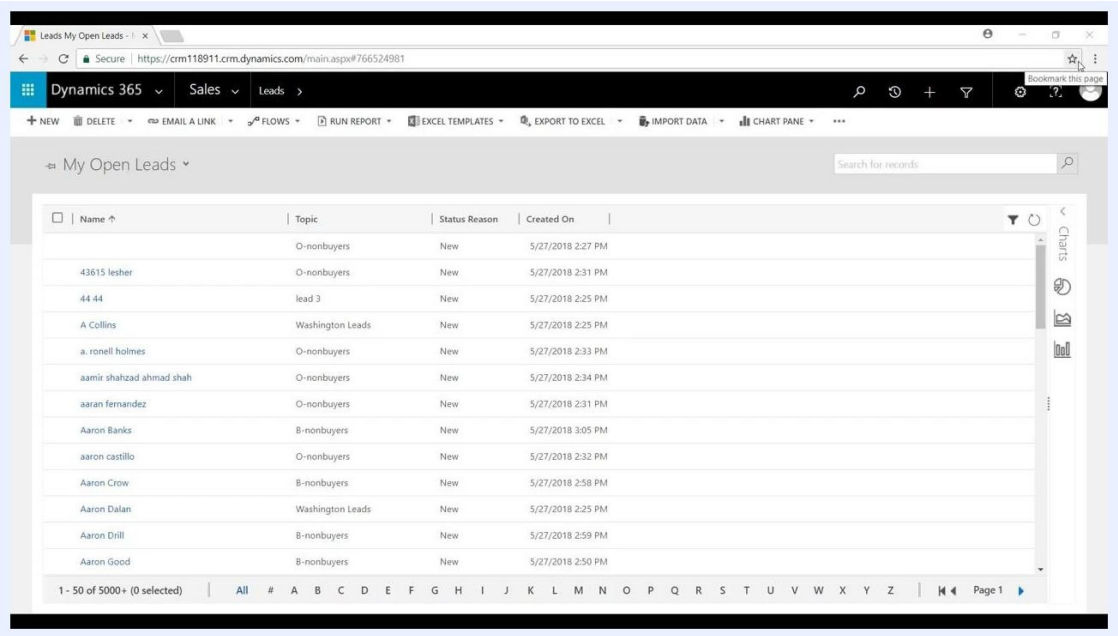
This guide walks you through how to configure an SLA in Dynamics 365 and apply it to lead records, so that leads are contacted within four hours of creation. If the SLA is not met, the lead is automatically reassigned to another resource. You will enable SLA functionality on the Lead entity, build the SLA KPI timer infrastructure, and add the SLA section to the Lead form so users can monitor compliance directly from each record.

Prerequisites

- Starting with CRM 2016 version 8.1, you can add SLAs to any entity except recurring appointments.
- Out-of-the-box SLA KPIs are available only for the Case and Lead entities. For any other entity, you must first create SLA KPI timers in QuickView forms before configuring the SLA.
- You need access to a Dynamics 365 CRM instance and permissions to customize the system.

Step 1: Open the Leads area

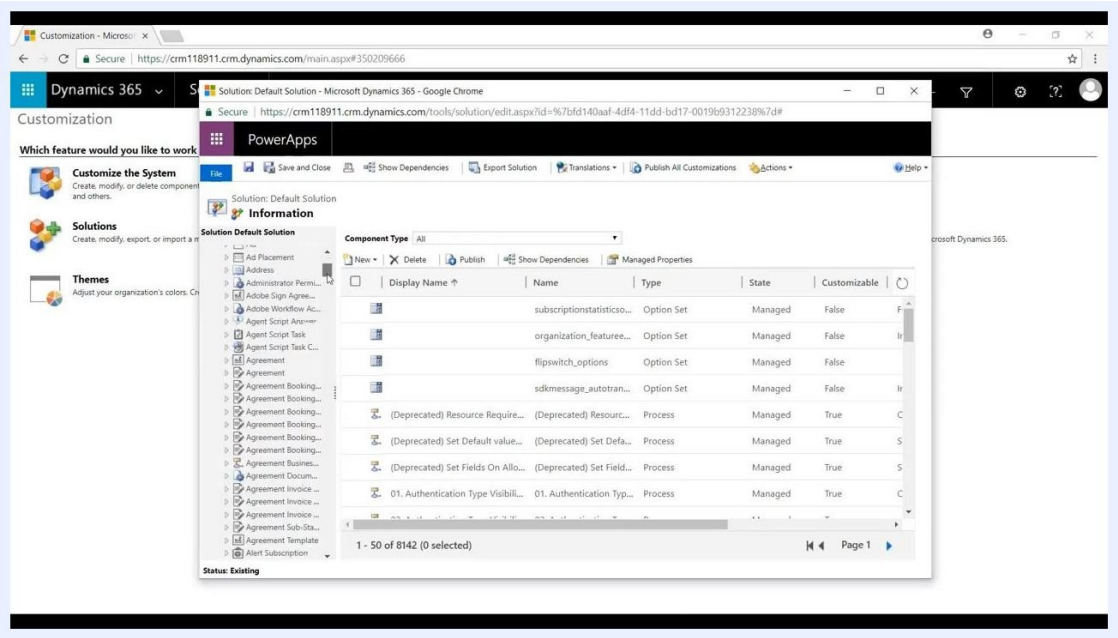
Launch your web browser, navigate to your Dynamics 365 CRM instance, and log in if prompted. From the main navigation bar, select Sales, then Leads. The My Open Leads view displays your lead records with columns for Name, Topic, Status Reason, and Created On.



Dynamics 365 "My Open Leads" view listing leads with columns for Name, Topic, Status Reason, and Created On. The top navigation bar shows options including Sales, Leads, New, Delete, Email a Link, Flows, Run Report, Excel Templates, Export to Excel, Import Data, and Chart Pane.

Step 2: Navigate to customizations

Click Settings in the top navigation bar. In the drop-down menu, locate the Customization section and click Customizations.

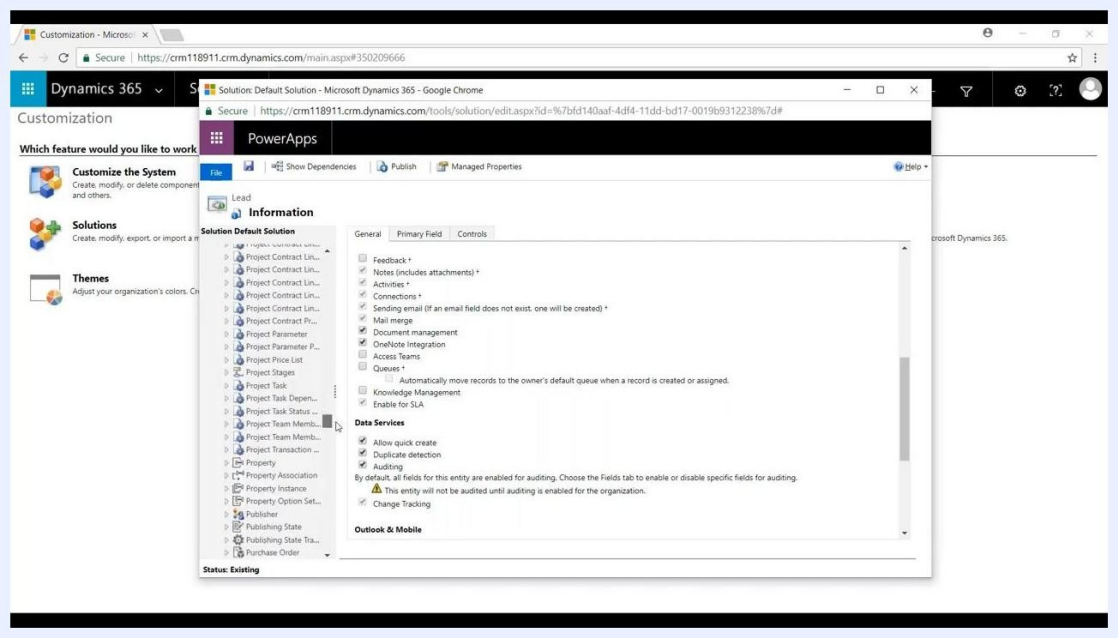


Dynamics 365 Settings menu expanded, showing Customizations, Solutions, Microsoft AppSource, and Plug-In Trace Log under Customization, with the cursor pointing to Customizations.

In the Customization area, select Customize the System to open the PowerApps editor. The editor displays the Default Solution with a list of components in the left navigation pane.

Step 3: Enable SLA on the Lead entity

In the left navigation pane, scroll to find the Lead entity and click it to open its properties. Scroll down to the Communications & Collaboration section and confirm that Enable for SLA is checked.

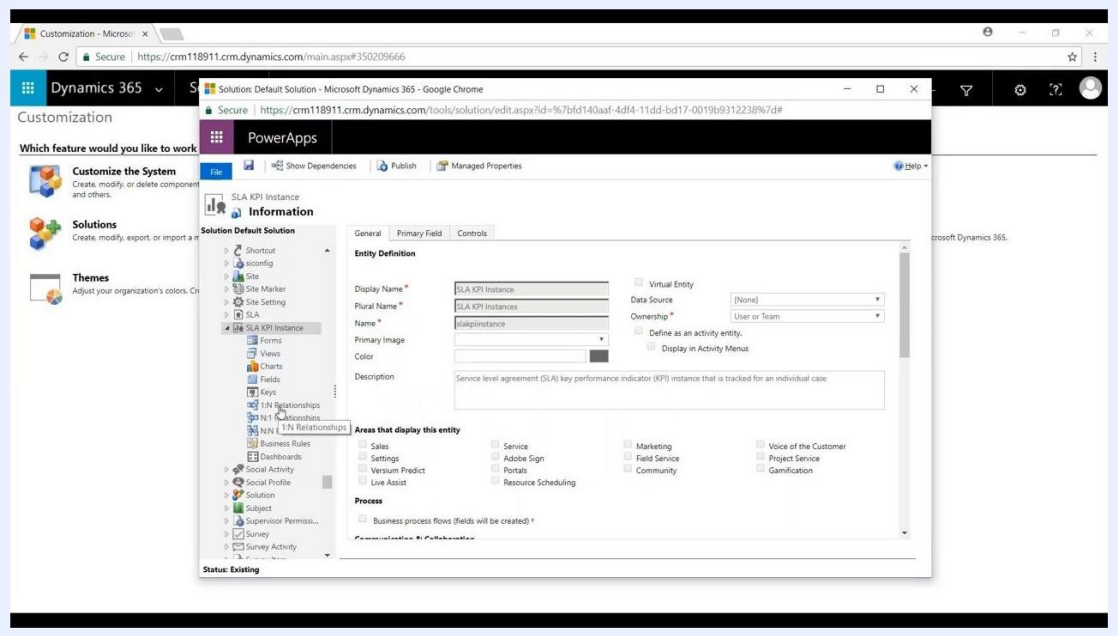


PowerApps editor showing the Lead entity properties with the "Enable for SLA" checkbox visible and checked. Other visible options include Feedback, Notes, Activities, Connections, Mail merge, Document management, OneNote Integration, Access Teams, Queues, Knowledge Management, and Data Services.

If you are configuring SLAs for an entity other than Case or Lead, plan to create SLA KPI timers in QuickView forms before continuing.

Step 4: Create a one-to-many relationship for the SLA KPI timer

In the PowerApps editor, navigate to the SLA KPI Instance entity, expand its options, and select 1:N Relationships. Click New 1-to-Many Relationship.

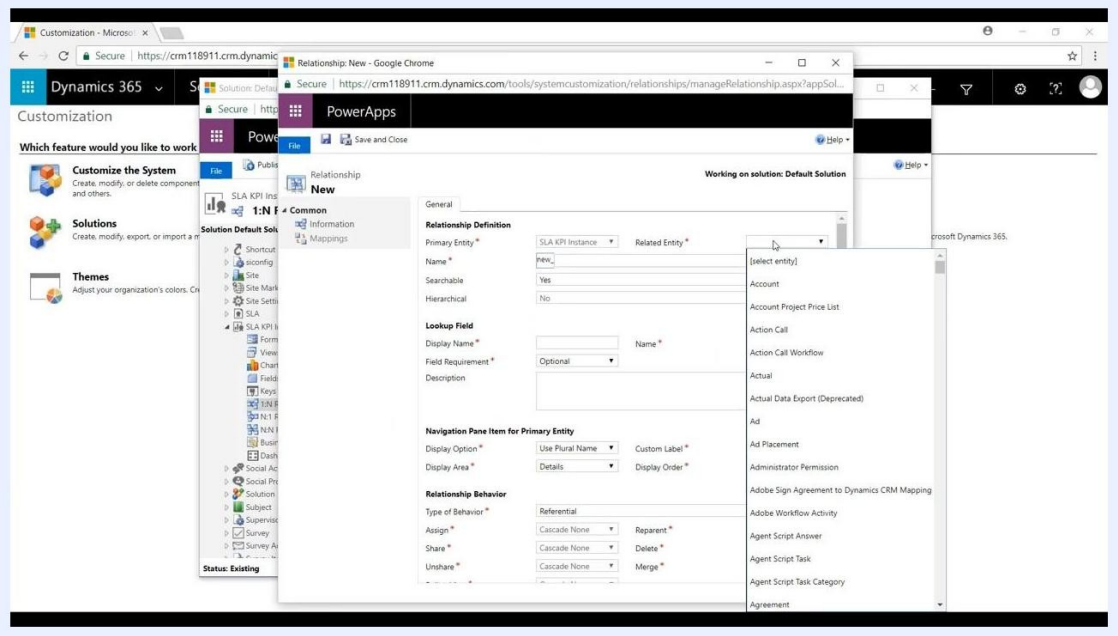


PowerApps editor showing the SLA KPI Instance entity with the 1:N Relationships option selected. The main pane displays the entity definition, including Display Name, Plural Name, Name, and Description fields.

In the Relationship Definition window, configure the following:

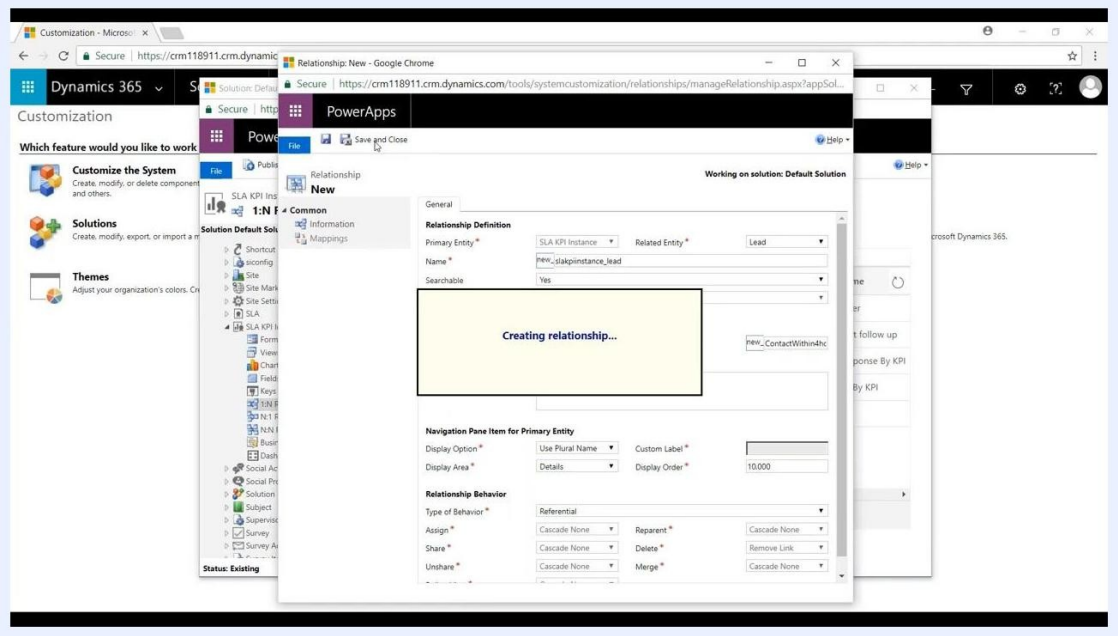
- Primary Entity: SLA KPI Instance
- Related Entity: Lead
- Name: A descriptive name such as new_slakpiinstance_lead
- Lookup Field Display Name: Contact Within 4 hours
- Field Requirement: Leave as Optional

Adjust any other settings as needed for your business process, then click Save and Close to create the relationship.



PowerApps Relationship Definition window for creating a new 1:N relationship, with Primary Entity set to SLA KPI Instance, Related Entity being set to Lead, and fields for Name, Display Name, and other options visible.

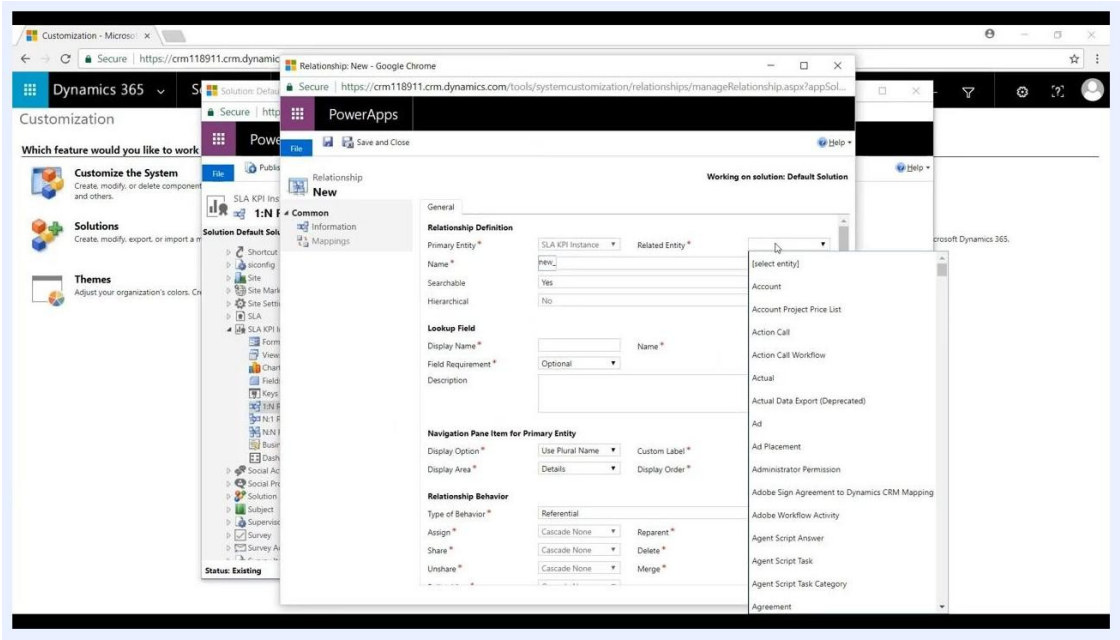
Wait for the system to process the request. A "Creating relationship..." message confirms the relationship is being created.



PowerApps window displaying the "Creating relationship..." message while the new 1:N relationship between SLA KPI Instance and Lead is being created.

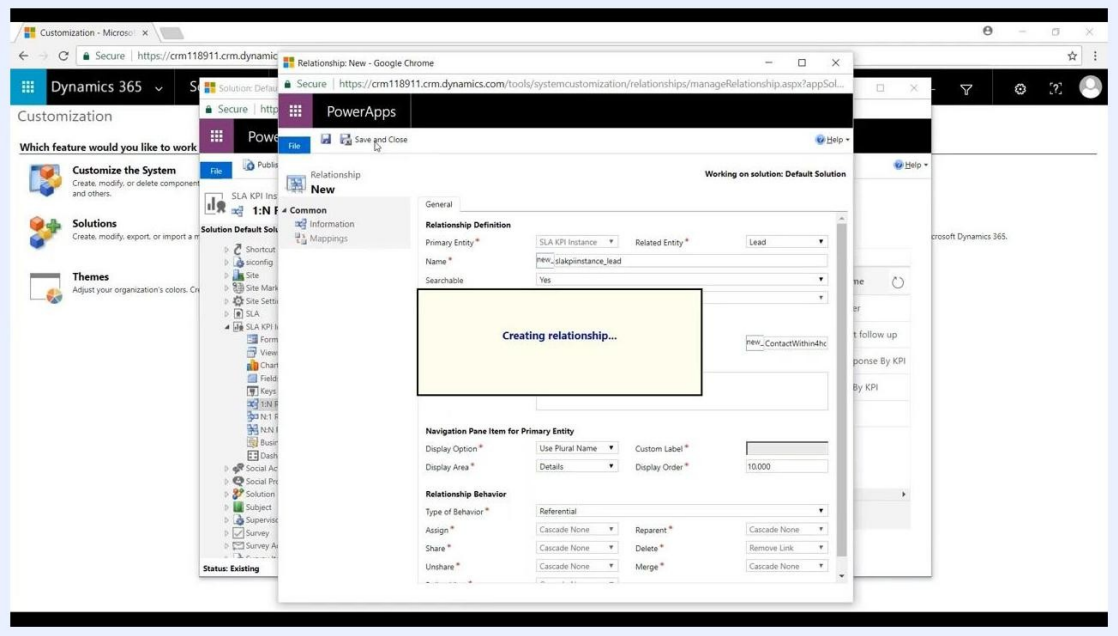
Step 5: Create a Quick View form for the timer

In the left navigation pane, under SLA KPI Instance, select Forms. Click to add a new form and choose Quick View Form.



PowerApps editor with the SLA KPI Instance entity expanded and Forms selected. The main pane lists existing 1:N relationships, including the new relationship with Lead.

Name the form Contact Within Four Hours. The form editor opens with a blank layout where you can add controls and fields.



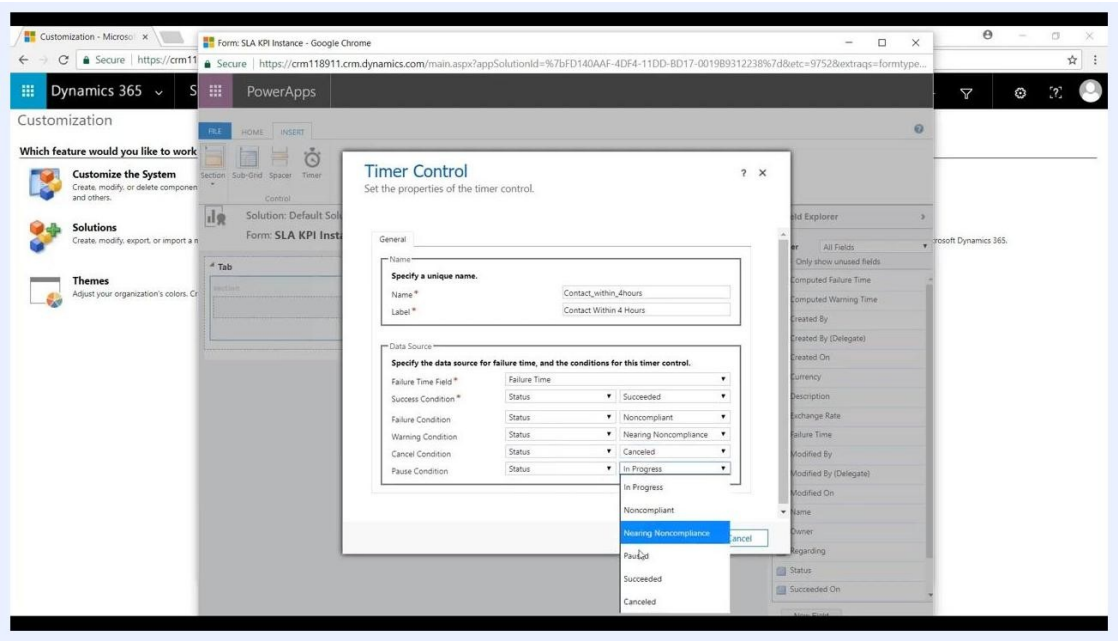
PowerApps form editor for SLA KPI Instance showing a blank form layout with the Field Explorer on the right, while the form is named "Contact Within Four Hours".

Step 6: Add and configure the timer control

In the form editor, insert a Timer Control onto the form. In the Timer Control properties window, configure the following:

- Name: Contact_within_4hours
- Label: Contact Within 4 Hours
- Failure Time Field: Failure Time
- Success Condition: Status = Succeeded
- Failure Condition: Status = Noncompliant
- Warning Condition: Status = Nearing Noncompliance
- Cancel Condition: Status = Canceled

- Pause Condition: Status = Paused

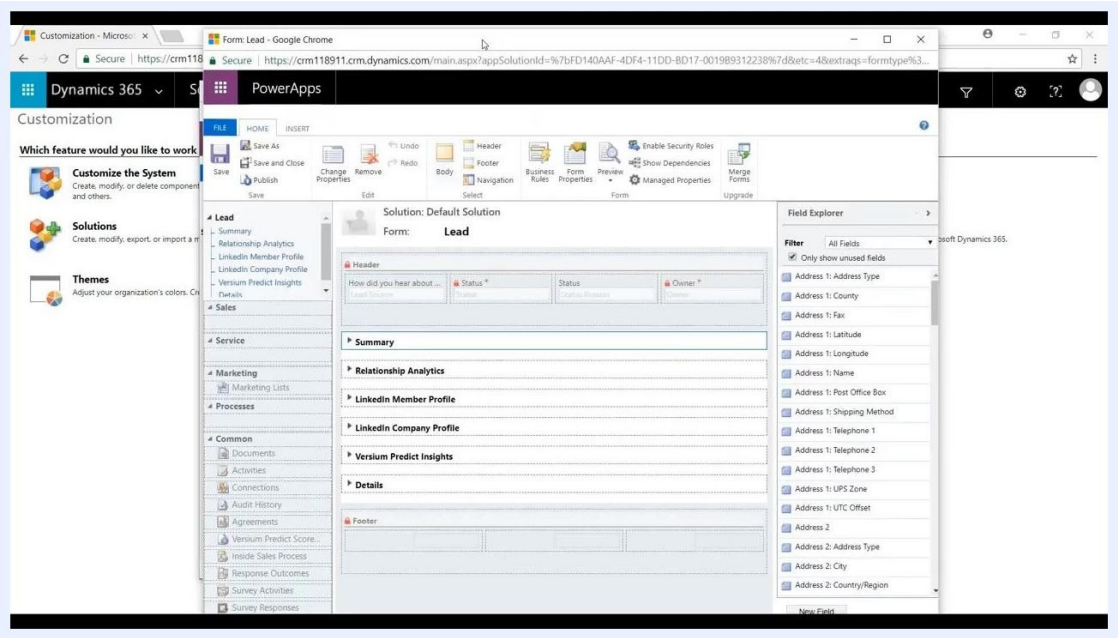


Timer Control configuration window in PowerApps with Name set to Contact_within_4hours, Label set to Contact Within 4 Hours, and dropdowns for Failure Time Field, Success Condition, Failure Condition, Warning Condition, Cancel Condition, and Pause Condition.

Click OK to save the timer control settings, then save the form with the name Contact Within Four Hours and click Save and Close to finalize the setup.

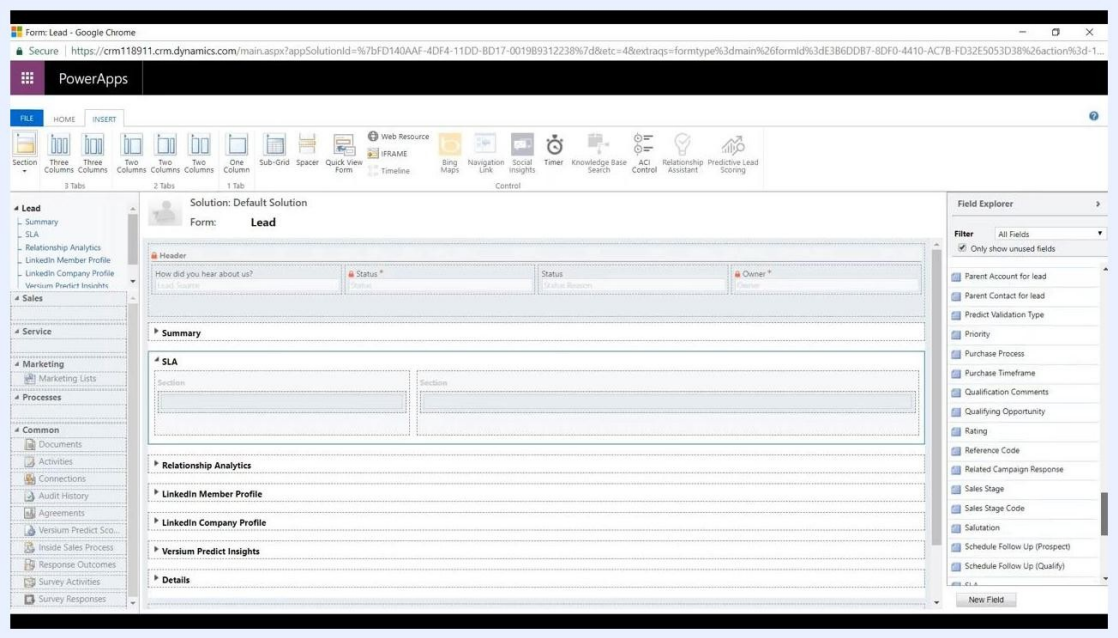
Step 7: Add an SLA section to the Lead form

In the left navigation pane, expand Lead and select Forms, then open the main Lead form for editing.



PowerApps editor showing the Lead form with sections such as Summary, Relationship Analytics, LinkedIn Member Profile, LinkedIn Company Profile, Versium Predict Insights, and Details. The Field Explorer is visible on the right.

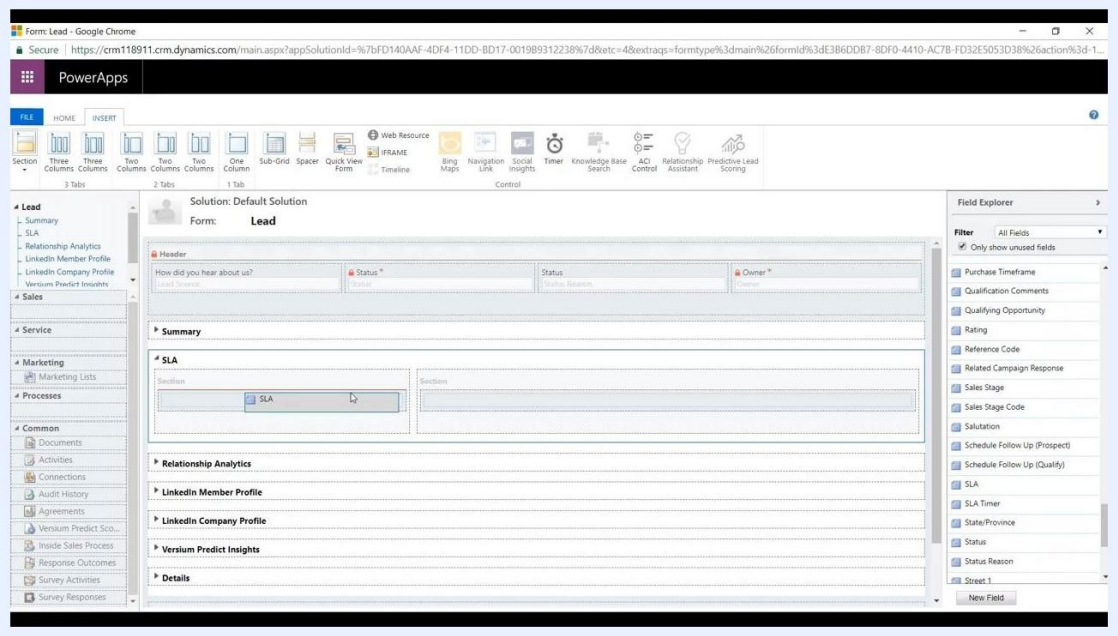
In the form layout, add a new section and name it SLA. The section appears in the form layout, ready for additional fields and controls.



Lead form editor in PowerApps with a new section labeled SLA added to the layout. The section is empty and ready for configuration.

Step 8: Add the SLA lookup field

In the Field Explorer on the right, locate the SLA field and drag it into the new SLA section.



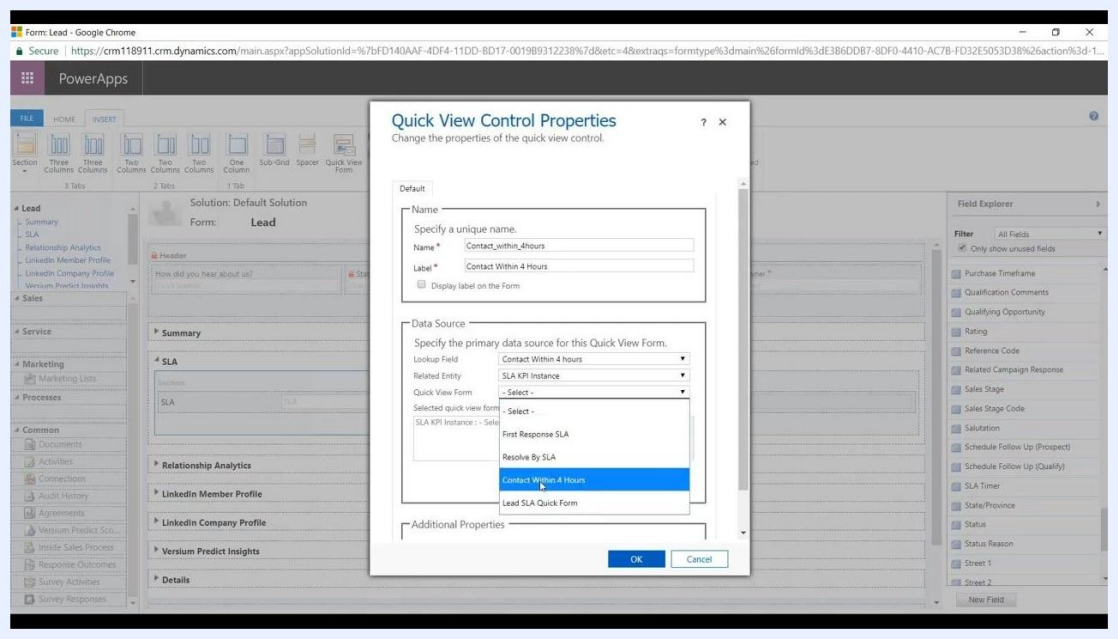
Lead form editor with the SLA field added to the SLA section. The cursor shows the field being placed in the section.

Step 9: Add a Quick View form to the SLA section

In the form editor ribbon, click Quick View Form. In the Quick View Control Properties window, configure the following:

- Name: Contact_within_4hours
- Label: Contact Within 4 Hours
- Lookup Field: Contact Within 4 hours
- Related Entity: SLA KPI Instance

- Quick View Form: Contact Within 4 Hours



Quick View Control Properties window in PowerApps with Name set to Contact_within_4hours, Label set to Contact Within 4 Hours, Lookup Field set to Contact Within 4 hours, Related Entity set to SLA KPI Instance, and Quick View Form being selected as Contact Within 4 Hours.

Click OK to add the Quick View Form to the SLA section.

Step 10: Add a subgrid for related SLA KPI instances

In the form editor, add a Sub-Grid control to the SLA section. This subgrid displays all related SLA KPI Instance records for the lead, filtered by the relationship you created earlier.

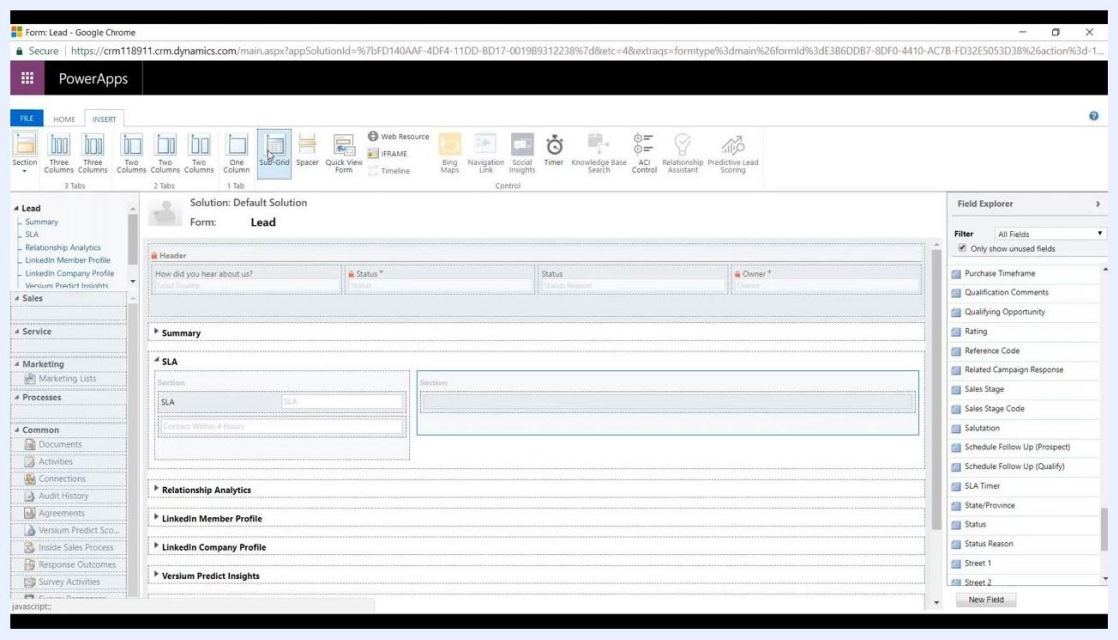
When prompted, name the subgrid SLAs and click OK to confirm. The subgrid helps you keep track of what's due and what's coming for each lead.

Step 11: Set subgrid properties

In the Set Properties dialog, configure the following:

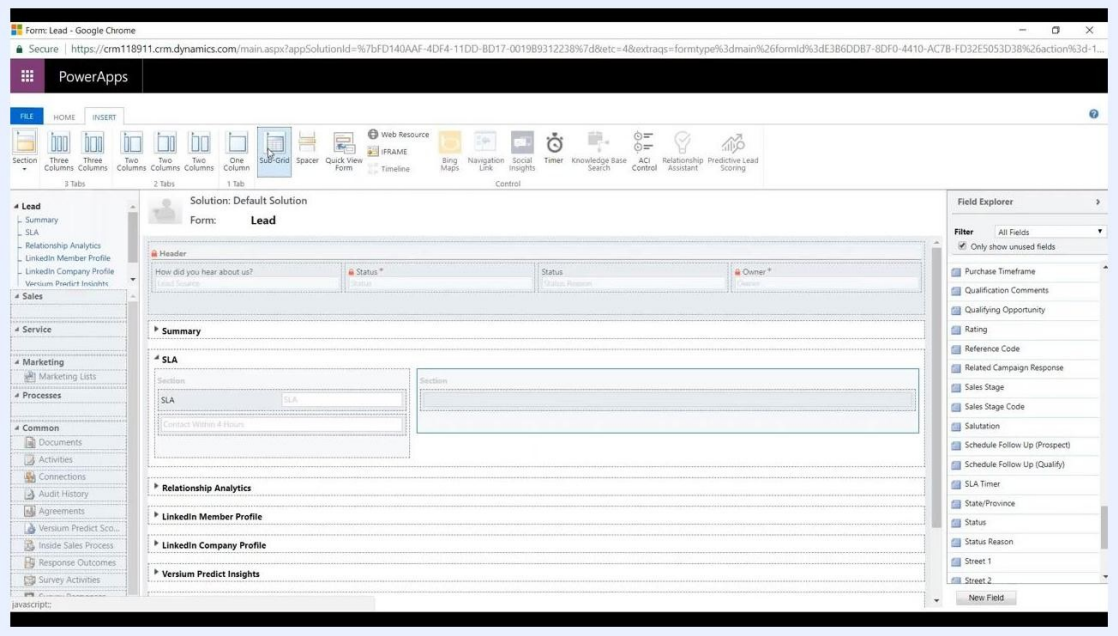
- Name: A unique name for the subgrid, such as SLAs
- Label: A display label, such as SLAs
- Entity: SLA KPI Instance
- Default View: An appropriate view, such as My Active SLA KPI Instances

Adjust any additional options as needed, such as enabling the search box or view selector, then click OK to save the subgrid properties.



Set Properties dialog in PowerApps showing configuration options for the subgrid, including Name, Label, Entity, and Default View, with the Entity dropdown expanded to show a list of available entities.

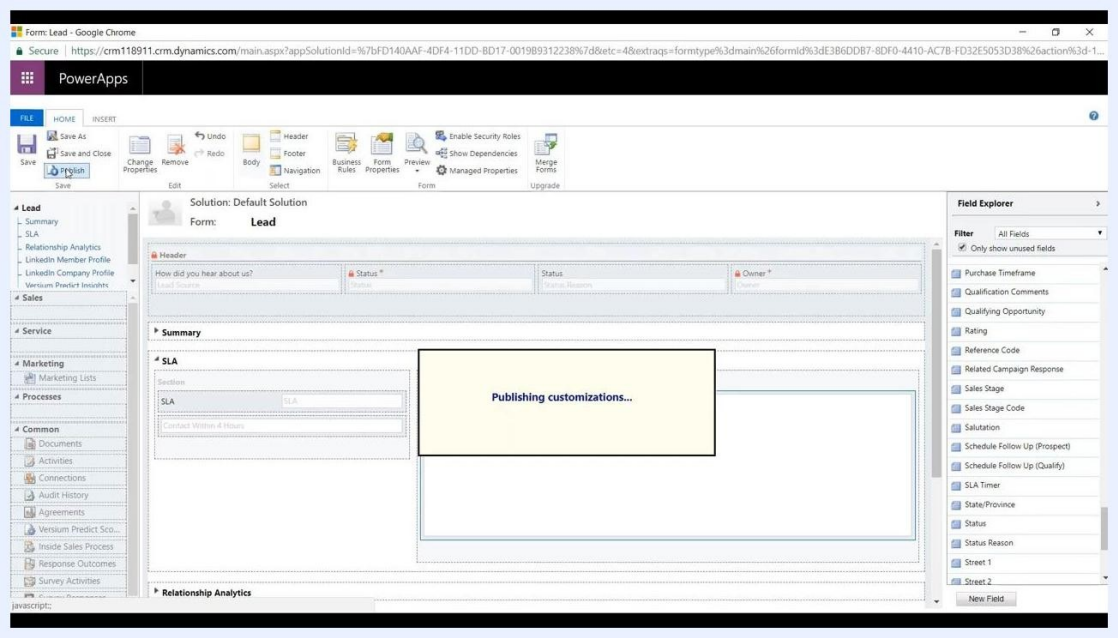
Confirm that the subgrid appears in the SLA section of the Lead form layout, labeled appropriately and ready to display related records.



Lead form editor in PowerApps with the SLA section containing the SLA lookup field, Quick View Form, and a newly added subgrid labeled SLA KPI Instances (Regarding). The subgrid area is empty and ready to display records.

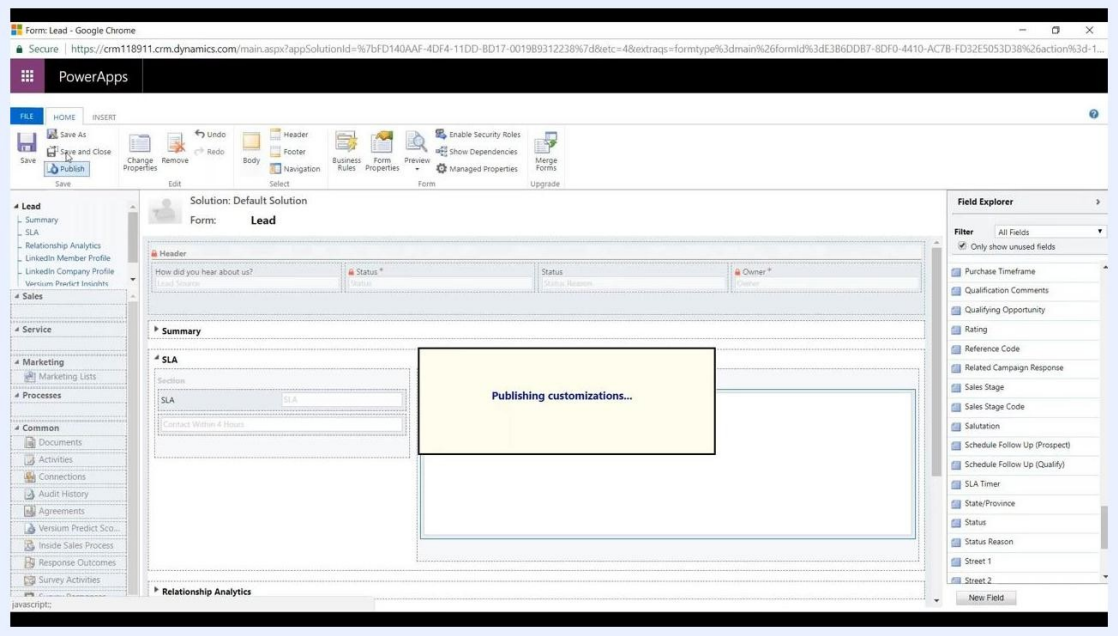
Step 12: Save and publish the form

Click Save in the form editor toolbar to save your changes, then click Publish to apply the customizations. A dialog appears indicating that customizations are being published.



PowerApps form editor showing the Lead form with a "Publishing customizations..." dialog overlay. The SLA section contains the SLA lookup, Quick View Form, and subgrid.

Remain on the page until the "Publishing customizations..." dialog disappears, confirming your changes are live.



PowerApps form editor with the "Publishing customizations..." dialog still visible, indicating the publishing process is ongoing.

Summary

You have configured an SLA in Dynamics 365 for the Lead entity by enabling SLA support, creating a one-to-many relationship between SLA KPI Instance and Lead, building a Quick View form with a timer control for the "Contact Within Four Hours" SLA, and adding a dedicated SLA section to the Lead form with a lookup field, Quick View form, and subgrid. This setup enforces timely follow-up on leads and gives users clear visibility into SLA compliance directly from each Lead record.

What's next

Continue defining additional SLA details and KPI timers as required for your business process, and repeat the QuickView form and timer control setup for any other entities beyond Case and Lead that need SLA tracking.