

SERVICE CLOUD ASSIGNMENT - 2

Task -1

* Created 1 Record types

Mail cases for Cases with origin as Mail. Picklist Origin value as EMAIL default.
Web cases for cases with origin as Web. Picklist Origin value as WEB default.

<p>Mail Cases</p> <p>Web Cases</p>	<p>Piyush Dhaked, 9/19/2022, 9:07 AM</p> <p>Piyush Dhaked, 9/19/2022, 9:07 AM</p>
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Record Type Edit Case Origin <small>Record Type Edit: Case Origin ~ Salesforce - Developer Edition</small>																									
<div style="display: flex; justify-content: space-between;"> <div style="flex: 1;"> <p>General Properties</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Field Label</td> <td style="width: 85%;">Case Origin</td> </tr> <tr> <td>Record Type</td> <td>Mail Cases</td> </tr> </table> <p>Picklist Values</p> <p>Select an item from the Available Values list and add it to the Selected Values list Type.</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 30%;">Available Values</th> <th style="width: 70%;">Selected Values</th> </tr> <tr> <td style="border: 1px solid #ccc; padding: 5px; height: 150px;">--None--</td> <td style="border: 1px solid #ccc; padding: 5px; height: 150px; vertical-align: top;"> Phone Email Web </td> </tr> <tr> <td style="text-align: right; padding-top: 10px;"> Add </td> <td style="text-align: right; padding-top: 10px;"> </td> </tr> <tr> <td colspan="2" style="text-align: center; padding-top: 10px;"> Default <input style="border: 1px solid #ccc; padding: 2px 10px; margin-left: 10px;" type="button" value="Email"/> </td> </tr> </table> </div> <div style="flex: 1; padding-top: 20px;"> <p>Record Type Edit Record Type Edit: Case Origin ~ Salesforce - Developer Edition</p> <p>General Properties</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Field Label</td> <td style="width: 85%;">Case Origin</td> </tr> <tr> <td>Record Type</td> <td>Web Cases</td> </tr> </table> <p>Picklist Values</p> <p>Select an item from the Available Values list and add it to the Selected Values list Type.</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 30%;">Available Values</th> <th style="width: 70%;">Selected Values</th> </tr> <tr> <td style="border: 1px solid #ccc; padding: 5px; height: 150px;">--None--</td> <td style="border: 1px solid #ccc; padding: 5px; height: 150px; vertical-align: top;"> Phone Email Web </td> </tr> <tr> <td style="text-align: right; padding-top: 10px;"> Add </td> <td style="text-align: right; padding-top: 10px;"> </td> </tr> <tr> <td colspan="2" style="text-align: center; padding-top: 10px;"> Default <input style="border: 1px solid #ccc; padding: 2px 10px; margin-left: 10px;" type="button" value="Web"/> </td> </tr> </table> </div> </div>		Field Label	Case Origin	Record Type	Mail Cases	Available Values	Selected Values	--None--	Phone Email Web	Add 	 	Default <input style="border: 1px solid #ccc; padding: 2px 10px; margin-left: 10px;" type="button" value="Email"/>		Field Label	Case Origin	Record Type	Web Cases	Available Values	Selected Values	--None--	Phone Email Web	Add 	 	Default <input style="border: 1px solid #ccc; padding: 2px 10px; margin-left: 10px;" type="button" value="Web"/>	
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*Created 2 support Processes for Mail and Web cases and Path accordingly.

Edit Del	Case from Mail	✓	Piyush Dhaked, 9/16/2022, 5:06 PM
Edit Del	Case from Web	✓	Piyush Dhaked, 9/16/2022, 5:07 PM

Case from Mail

Select a value from the Available Values list and add it to the Selected Value

Case Status	
Available Values	Selected Values
Working Closed (Closed) On Hold Waiting for Customer Response Received	New Escalated In Progress Merged (Closed)
Add Remove	
Default New	

Case from Web

Select a value from the Available Values list and add it to the Selected Value

Case Status	
Available Values	Selected Values
Working On Hold Waiting for Customer Response Received	New Escalated Closed (Closed) In Progress
Add Remove	
Default New	

*Created 2 Lightning Record Page for Mail and Web origin cases by adding different path.

These paths are further added in respective lightning record page.

Mail to Case Path	<input checked="" type="checkbox"/>	Case	Mail Cases	Delete Edit Deactivate
Web to Case	<input checked="" type="checkbox"/>	Case	Web Cases	Delete Edit Deactivate

[Disable Path](#)
 Remember user's Path preferences ?

TASK - 2,3,4,

Omni-Channel Settings

Omni-Channel routes work items to your support agents. It sets agent capacity for accepting work and agent availability.

- Enable Omni-Channel Enabled omni channel
- Enable Skills-Based and Direct-to-Agent Routing
- Enable Secondary Routing Priority Enabled priority based routing
- Enable Status-Based Capacity Model Enabled status based capacity
- Display a login confirmation upon loading a console with Omni-Channel

Save **Cancel**

* Capacity of Agent and Presence Configurations -

Presence Configurations

[« Back to List: Presence Configurations](#)

Basic Information

[Edit](#) [Delete](#)

Presence Configuration Name	Config 1
Developer Name	Config_1
Capacity	3
Automatically accept work requests	<input checked="" type="checkbox"/>
Allow agents to decline work requests	<input type="checkbox"/>
Update Status on Decline	
Allow agents to choose a decline reason	<input type="checkbox"/>
Update Status on Push Timeout	

[Edit](#) [Delete](#)

Audio Settings

Play a notification sound for work requests	<input checked="" type="checkbox"/>
Notification Sound	Default
Sound Length (Seconds)	
Play a notification sound if Omni Channel loses connection	<input checked="" type="checkbox"/>

Assigned Users

[▼ Users](#)

Assigned Profiles

[▼ Profiles](#)

[System Administrator](#)
[Employee Profiles](#)

Routing Configuration -

Routing Configurations

[« Back to List: Routing Configurations](#)

Basic Information	
Routing Configuration Name	Case Routing
Developer Name	Case_Routing
Overflow Assignee	<u>Customer Suport Team</u>
▼ Routing Settings	
Routing Priority	1
Routing Model	Most Available
Push Time-Out (seconds)	
Drop Additional Skills Time-Out (seconds)	
Units of Capacity	1.00
Percentage of Capacity	
▼ Skills-Based Routing Rules	
Use with Skills-Based Routing Rules	<input type="checkbox"/>
▼ Related Queues	
Label	Queue Name

* Service Channel settings -

Service Channels

[« Back to List: Service Channels](#)

Basic Information	
Service Channel Name	Customer Support Channel
Developer Name	Customer_Support_Channel
Salesforce Object	Case
Custom Console Footer Component	
Minimize the Omni-Channel widget when work is accepted	<input type="checkbox"/>
Automatically accept work requests	<input type="checkbox"/>
▼ Audio Settings	
Override agents' audio settings	<input type="checkbox"/>
▼ Secondary Routing Priority	
Secondary Routing Priority Field	Priority
Priority values	High 1 Low 3 Medium 2
▼ Capacity Settings	
Capacity Model	Status-based
Status Field	Status
Values for In-Progress	New Working Escalated
Check agent capacity on reopened work items	<input checked="" type="checkbox"/>
Check agent capacity on reassigned work items	<input checked="" type="checkbox"/>

TASK - 5

Omni Supervisor -

Supervisors can check the health of their call-centre in real time using the Agents, Queues Backlog, Assigned Work, and Skills Backlog tabs in Omni Supervisor. It helps automatic routing of different kinds of work items (such as Leads and Cases) to agents.

The screenshot shows the Service Cloud - 2 interface with the 'Omni Supervisor' tab selected. The main area displays the 'Agents' tab, which includes a table of agent status and a sidebar with channel and work details.

AGENT	STATUS	ACTION	WORK SUMMARY	STATE	LOGIN	ACCEPT	CAPACITY	WORKLOAD	CHANNELS	ASSIGNED QUEUES	SKILLS
Piyush Dhaked	Available - Chat since Sep 18, 2022, 10:55:56 AM	Change Status		2 min 50 s	2 min 50 s	--	0%	0 / 5	Customer Support Chat, Live Web Support		

Omni-Channel

- Available - Chat
- You have no active requests.

New (0) My work (0)

1 - 1 of 1 Display 10 records per page Previous Next Page 1

Macros Omni-Channel (Online)

Omni Supervisor have these flooring tabs.

- 1) Agents - With this supervisor can check agent's all status in detail in real-time. Presence and chatting status, last online etc are shown in this tab. But only Online agents are shown here.

-> There are further 2 tabs “AGENTS” & “AGENTS by QUEUE”

2) Queue Backlog - The Queues Backlog tab is shown if either queue-based routing or external routing for Omni-Channel is enabled in your org.

QUEUE ↑↓	PRIORITY ↑↓	WORK SIZE	TYPE ↑↓	TOTAL WAITING ↑↓	LONGEST WAIT TIME ↑↓	AVERAGE WAIT TIME ↑↓
Customer Support Chat	4	3 units	💬	0	--	--
Live Web Support	2	1 unit	💬	0	--	--

Omni-Channel

- Available - Chat
- You have no active requests.

New (0) My work (0)

3) Assigned Work - We can assigned work summary view to get info about what type of work he is assigned into.

QUEUE ↑↓	TYPE ↑↓	ASSIGNED ↑↓	OPEN ↑↓	AHT ↑↓	ASA ↑↓
Customer Support Chat	💬	0	0	--	--
Live Web Support	💬	0	0	--	--

4) Skills Backlog - Provide information to supervisors of pending work items for skills-based routing of agent.

The screenshot shows the 'Skills Backlog' section of the Service Cloud interface. At the top, there are four tabs: 'Agents', 'Queues Backlog', 'Assigned Work', and 'Skills Backlog'. The 'Skills Backlog' tab is selected. Below the tabs, there is a summary section titled 'Skills Backlog Summary' with three metrics: 'TOTAL WAITING' (0), 'LONGEST WAIT TIME' (--), and 'AVERAGE WAIT TIME' (--). A 'Clear Filters' button is located in the bottom right corner of this summary area. Below the summary, there is a table header with columns: 'TYPE', 'DETAILS', 'SKILLS', 'PRIORITY ↑↓', 'WORK SIZE ↑↓', 'WAIT TIME ↑↓', and 'REQUESTED TIME ↑↓'. A message 'No records to display.' is centered below the table header. At the very bottom of the screenshot, there is a footer bar with icons for 'Macros' and 'Omni-Channel (Online)'.

END OF ASSIGNMENT
