Omni-Channel for Administrators

Salesforce, Spring '19

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OMNI-CHANNEL FOR ADMINISTRATORS

Route any type of incoming work item to the most qualified, available support agents in your call center. Omni-Channel integrates seamlessly into the console in both Salesforce Classic and Lightning Experience.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional**, **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Omni-Channel is a flexible, customizable feature, and you can configure it declaratively—that is, without writing code. Use Omni-Channel to manage the priority of work items, which makes it a cinch to route important work items to agents quickly. Manage your agents' capacity to take on work items so that they're given only the number of assignments that they can handle. You can also define which agents can work on different types of assignments. For example, you can create one group of agents to respond to leads and sales inquiries, and another group that helps customers with support questions.

Best of all, Omni-Channel routes all these assignments to the correct agents automatically. Agents no longer have to pick and choose work assignments manually from a queue, which saves everyone in your call center time, effort, and brainpower. Because it's easier for agents to work on their assignments, they can assist your customers faster and more effectively and close assignments more quickly.

Let's get started!

Set Up Omni-Channel with a Guided Setup Flow
Get ready to route cases with Omni-Channel in Lightning Experience with a quick guided setup flow. Create a queue and routing configuration, select your support agents, and add Omni-Channel to the utility bar in your default Lightning Service Console app.

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Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Once you've created your Presence Statuses for Omni-Channel, you need to set up how your users will access them. You can set access through permission sets or profiles.

Add the Omni-Channel Widget to the Salesforce Console
After you get Omni-Channel all set up for your organization, it's time to add the Omni-Channel widget to the Salesforce console so that your agents can start receiving work.

Add the Omni-Channel Utility to a Lightning Console App
Add the Omni-Channel utility to your Lightning Service console to route work to agents in a flash.

Test Your Omni-Channel Implementation
Now that you've got Omni-Channel set up and enabled, test your implementation to make sure it's working correctly.

Use Omni-Channel with Your Existing Live Agent Implementation
Are you loving Live Agent and want to add Omni-Channel to the mix? Here's what changes for you and your organization (and not for your agents!).

Skills-Based Routing for Omni-Channel

Your agents have different skills sets and abilities. Your customers have different needs. Skills-based routing lets your contact center route work to the best agent for the job, so that customer work items are assigned to the agent who is best able to solve the issue. Skills-based routing improves the quality of customer service by automatically routing work items to the agent who has the skills necessary to do the work.

Use External Routing for Omni-Channel

Integrate third-party routing with a partner application with Omni-Channel using Salesforce standard APIs and streaming APIs. External routing is supported with Omni-Channel in both Salesforce Classic and Lightning Experience.

Omni-Channel Reference

Understand how Omni-Channel routing works and reference the fields for agent work records and user presence records.

Set Up Omni-Channel with a Guided Setup Flow

Get ready to route cases with Omni-Channel in Lightning Experience with a quick guided setup flow. Create a queue and routing configuration, select your support agents, and add Omni-Channel to the utility bar in your default Lightning Service Console app.

The Omni-Channel setup flow is the fastest and easiest way to get up and running with case routing in Lightning Experience. When you complete the flow, Omni-Channel is ready to use in the default Lightning Service Console app. Cases are routed to your support agents using your shiny new queue and routing configuration.

EDITIONS
Service Setup is available in Lightning Experience
Available in: All editions with the Service Cloud

> **Note:** This setup flow sets up queue-based routing for Omni-Channel, not skills-based routing. You must set up skills-based routing manually.

Where to Access the Setup Flow

This flow is available from Service Setup in Lightning Experience. You can get to Service Setup by clicking ⚙ and selecting Service Setup.

In Service Setup, you can find recommended setup flows, content, and tips based on what you've set up already. If you don't see the setup flow you're looking for, you can click View All to see the full list.

Select the tile to launch the flow.

What Does This Flow Do?

In this setup flow, we walk you through:

- Enabling Omni-Channel
- Creating a queue to hold incoming cases until they're routed to an agent
- Creating a routing configuration and a presence configuration, which work in tandem to control your agents' workload and set the priority for work in your queue
- Selecting the users who can receive work requests
- Setting agent capacity and the work item size for cases that come in through your new queue

> **Note:** We name a few of these objects for you. The presence configuration name is based on what you entered as the name for the group of agents you created. If you didn't have a routing configuration already, we gave it the same name as your queue. You can change these names in your Omni-Channel settings in Setup.

We turn on several things in the background during the setup flow.

Enable Omni-Channel

If it isn't enabled already, we turn on Omni-Channel.

Create a Service Channel for Cases

Service channels let you choose which objects you want to route in Omni-Channel. We create one for cases to get you started.

Create Presence Statuses

Presence statuses are what agents use to go online in Omni-Channel. We create three presence statuses for your agents to use: Available, On Break, and Busy. The Available status makes the agent available only to accept cases.

Create and Assign a Permission Set with Presence Statuses Assigned to Users

To make sure that your agents have access to the presence statuses we create, we make a permission set that assigns the presence statuses to the users you select in the setup flow. The permission set is called Omni Setup Flow (with developer name `Omni_Setup_Flow`).

Add the Omni-Channel Utility to Your Console

We add the Omni-Channel utility to the default Lightning Service Console app.

Omni-Channel Setup Flow: What's Next?

Learn where you can customize and view what you set up during the Omni-Channel setup flow.

SEE ALSO:

Get to Know Service Setup and Install Service Features

Omni-Channel Utility for Lightning Console Apps

Omni-Channel Setup Flow: What's Next?

Learn where you can customize and view what you set up during the Omni-Channel setup flow.

After completing the setup flow, you have an Omni-Channel queue with agents assigned and ready to get to work!

Get Work into Your New Queue

Set up automatic assignment for cases so incoming work goes straight to your queue, where it's routed to an agent. Head on over to Process Builder to set criteria for your incoming cases.

Make More Queues

If you want to create more queues to cover different support tier levels or work priorities, for example, then run through the setup flow again. And again, and again…

Test it Out

We added Omni-Channel to the utility bar in your default Lightning Service Console app, so when you're ready, hop into your console to test out your implementation as a support agent. Simply log in, create a case, change the case owner to your new queue, and watch the case appear as a work request in the utility.

Note: If you didn't add yourself as an agent during the setup flow, you can add yourself to the permission set we created for you.

Customize Omni-Channel

To route other objects like chats and leads, go to Setup and enter `Omni-Channel` in the `Quick Find` box. Then, select **Service Channels**.

You can create statuses that make the agent available for one or more work types at a time. For example, you can have a presence status that makes the agents available for cases and another for cases and chats. To create and edit presence statuses, go to Setup and enter `Omni-Channel` in the `Quick Find` box. Then, select **Presence Statuses**. To assign presence statuses to you and your team, you can use permission sets or profiles.

You can also add Omni-Channel to any console app. Simply edit or create a console app in the App Manager in Setup, or in your app settings in Salesforce Classic Setup.

Hit the Trails with Trailhead

Don't forget to check out more awesome Omni-Channel features like Omni-Channel Supervisor, decline reasons, and push timeout in the Omni-Channel Basics module on Trailhead.

SEE ALSO:

Trailhead: Omni-Channel Basics

Test Your Omni-Channel Implementation

Give Users Access to Presence Statuses with Profiles

Customize Omni-Channel

The first step towards getting your Omni-Channel implementation up and running is to create the necessary objects in Salesforce.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional**, **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Enable Omni-Channel

Enable Omni-Channel to gain access to the objects that you'll use to set up the feature in your organization.

Create Service Channels

Service channels let you turn nearly any Salesforce object such as a case, lead, SOS session, or even a custom object into a work record. Omni-Channel then plucks these work items from their queues like flowers from the garden of agent productivity and routes them to your agents in real time.

Create Routing Configurations

Routing configurations determine how work items are routed to agents. Use them to prioritize the relative importance and size of work items from your queues. That way, the most important work items are handled accordingly, and work is evenly distributed to your agents. To start routing work items to agents, create routing configurations and assign them to queues.

Associate Routing Configurations and Agents with Queues

Queues are a classic element of Salesforce that help your teams manage leads, cases, contact requests, and custom objects. Omni-Channel supercharges your queues to be able to route work items to your agents in real time. Agents don't have to select work items manually from queues because Omni-Channel routes work items to agents automatically and in real time!

Create Presence Configurations

Let's focus on agents for a minute. Presence configurations determine how much work agents can take on and what Omni-Channel behaviors they can access while they assist customers. Your organization can have multiple configurations for different groups of agents who support different channels.

Create Presence Statuses

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline.

Enable Omni-Channel

Enable Omni-Channel to gain access to the objects that you'll use to set up the feature in your organization.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional**, **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

1. From Setup, enter `Omni-Channel Settings` in the Quick Find box, then select **Omni-Channel Settings**.
2. Select **Enable Omni-Channel**.
3. Click **Save**.

Create Service Channels

Service channels let you turn nearly any Salesforce object such as a case, lead, SOS session, or even a custom object into a work record. Omni-Channel then plucks these work items from their queues like flowers from the garden of agent productivity and routes them to your agents in real time.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional**, **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Service channels let you manage sources of work and their priority compared to other work items. After you create service channels, you'll associate them with queues, which determine how work items are routed to your agents. You can create service channels for support channels, such as cases or SOS calls, or for sales channels, such as leads.

1. From Setup in Salesforce Classic, enter `Service Channels` in the Quick Find box, select **Service Channels**, then click **New**.
2. Specify the settings for your service channel.
3. Click **Save**.

Service Channel Settings

Customize your service channel settings to define how your organization receives work from various sources, such as chat, email, SOS calls, or social channels.

Supported Objects for Omni-Channel

Omni-Channel turbocharges your agents' productivity by assigning records to them in real time. But which objects and records does Omni-Channel support?

Service Channel Settings

Customize your service channel settings to define how your organization receives work from various sources, such as chat, email, SOS calls, or social channels.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional**, **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Setting	What It Does
Service Channel Name	Names the service channel. This service channel name, or a version of it, automatically becomes the API Name.
API Name	Sets the API name for the service channel.
Salesforce Object	The type of Salesforce standard or custom object that's associated with this service channel. For example, if you have a service channel for Web cases set the Related Object Type to *Case*. For a complete list of objects that service channels support, see Supported Objects for Omni-Channel.
Custom Console Footer Component	(Optional) Opens the specified custom console footer component when an agent accepts a work item request. For example, open a marketing campaign widget when an agent accepts a lead.

Supported Objects for Omni-Channel

Omni-Channel turbocharges your agents' productivity by assigning records to them in real time. But which objects and records does Omni-Channel support?

Available in: Salesforce Classic, Lightning Experience

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Omni-Channel currently supports routing for the following objects and records.

- Cases
- Chats
- Contact requests
- SOS video calls
- Social posts
- Orders
- Leads
- Custom objects that don't have a master object

Lightning Omni-Channel Routing (Beta) doesn't support routing for the following objects and records.

- SOS video calls

Create Routing Configurations

Routing configurations determine how work items are routed to agents. Use them to prioritize the relative importance and size of work items from your queues. That way, the most important work items are handled accordingly, and work is evenly distributed to your agents. To start routing work items to agents, create routing configurations and assign them to queues.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional**, **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Create a routing configuration for each service channel in your organization. After you create routing configurations, associate them with queues so your agents can receive work after we get Omni-Channel set up.

1. From Setup in Salesforce Classic, enter *Routing* in the Quick Find box, select **Routing Configurations**, then click **New**.

2. Specify the settings for your routing configuration.

3. Click **Save**.

Routing Configuration Settings
Customize your routing configuration settings to define how work items are pushed to agents.

Omni-Channel Routing Model Options
Specify how incoming work items are directed to agents using Omni-Channel.

Routing Configuration Settings

Customize your routing configuration settings to define how work items are pushed to agents.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional**, **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Basic Information

Setting	What It Does
Routing Configuration Name	Names the service routing configuration.
	This routing configuration name, or a version of it, automatically becomes the Developer Name.
Developer Name	Sets the API name for the service channel.
Overflow Assignee	Sets the user or queue that Omni-Channel routes items to when your org reaches Omni-Channel limits. Ensure that you:
	• Select a user or queue that has access to the objects that the queue(s) using this routing configuration handles

Setting	What It Does
	• Assign a routing configuration with an overflow assignee to all Omni-Channel queues involved in a bulk operation, such as changing the status or owner for multiple requests

Routing Settings

Setting	What It Does
Routing Priority	The order in which work items from the queue that are associated with this routing configuration are routed to agents. Objects in queues with a lower number are routed to agents first.
	For example, if you set the priority for highly qualified leads to *1* and the priority for less qualified leads to *2*, highly qualified leads are routed and assigned to agents before less qualified leads.
	On the backend, we identify agents with available capacity; then we assign work to them based on this priority order:
	1. The priority of the queue from which the work item came
	2. The amount of time that the work item has been waiting in the queue
	3. Members of the queue who are available to receive new work items from the queue
	When the work item is assigned to an agent, the owner of the object changes from the queue to the agent. If an agent declines the work item, we reassign it back to the queue with its original age so that it can be properly rerouted.
Routing Model	Determines how incoming work items are routed to agents who are assigned to the configuration's service channel.
Push Time-Out (seconds)	Sets a time limit for an agent to respond to an item before it's pushed to another agent.

Work Item Size

Setting	What It Does
Units of Capacity	Indicates the amount of an agent's overall capacity that's consumed when the agent is assigned a work item from queues that are associated with this configuration.
	The `Capacity` setting in the presence configuration the agent is assigned to determines the agent's overall capacity. When the agent is assigned a work item from the queue that's associated with this configuration, the `Capacity Weight` is subtracted

Setting	What It Does
	from the agent's overall capacity. Agents can be assigned work items until their overall capacity reaches 0.
	You can select a `Capacity Weight` or a `Capacity Percentage`, but not both.
`Percentage of Capacity`	The percentage of an agent's overall capacity that's consumed when the agent is assigned a work item from queues that are associated with this configuration.
	The agent's overall capacity is determined by the `Capacity` setting in the presence configuration that the agent is assigned to. When the agent is assigned a work item from the queue that's associated with this configuration, the `Capacity Percentage` is deducted from the agent's overall capacity until the agent has 0% capacity remaining.
	You can select a `Capacity Weight` or a `Capacity Percentage`, but not both.

Omni-Channel Routing Model Options

Specify how incoming work items are directed to agents using Omni-Channel.

Available in: Salesforce Classic, Lightning Experience

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In Omni-Channel, work items are automatically routed or "pushed" to agents who are assigned to the appropriate queue.

Routing Option	Description	Example
`Least Active`	Incoming work items are routed to the agent with the least amount of open work. When work items all consume 1 capacity, the agent with the lowest number of work items receives incoming work. The example presents a scenario in which agents have work with varying capacity impacts.	• Agent A and Agent B each have an overall capacity of 5. • Agent A has 3 active work items with capacity impact of 1. Agent B has 1 active work item with capacity impact of 4. • Because Agent A has a lower capacity impact than Agent B, incoming work items are routed to Agent A.
`Most Available`	Incoming work items are routed to the agent with the greatest difference between work item capacity and open work items. Capacity is determined by the presence configuration that the agent is assigned to.	• Agent A and Agent B each have an overall capacity of 5. • Agent A has 3 active work items while Agent B has 1.

Routing Option	Description	Example
		• Because Agent B has the most open capacity, incoming work items are routed to Agent B.

Associate Routing Configurations and Agents with Queues

Queues are a classic element of Salesforce that help your teams manage leads, cases, contact requests, and custom objects. Omni-Channel supercharges your queues to be able to route work items to your agents in real time. Agents don't have to select work items manually from queues because Omni-Channel routes work items to agents automatically and in real time!

Available in: Salesforce Classic, Lightning Experience

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The work items in the queue are assigned the priority that you specified in the routing configuration that you created earlier. If your organization already uses them, you can reuse queues that are available in your organization. That way, you can route work items in real time to the agents who are assigned to those queues.

If your organization doesn't use queues, create at least one queue to integrate with Omni-Channel. You can also create multiple queues to handle the different types of work items. For example, you might create one queue for incoming cases and another queue for incoming leads.

> **Note:** Omni-Channel doesn't limit the number of queues that you can use. However, you can only modify (insert, update, or delete) up to 16 queues in a single batch.

For routing to work correctly, assign each of your agents to the queue from which they are receiving work items.

1. In Setup, enter `Queues` in the Quick Find box, then select **Queues**.

2. Create a queue or edit an existing one.

3. In the `Routing Configuration` field, look up the routing configuration that you want to associate with the queue.

4. In the Queue Members section, add agents to the `Selected Users` field.

   These agents will receive work items from this queue.

5. Click **Save**.

SEE ALSO:

   Create Queues

Create Presence Configurations

Let's focus on agents for a minute. Presence configurations determine how much work agents can take on and what Omni-Channel behaviors they can access while they assist customers. Your organization can have multiple configurations for different groups of agents who support different channels.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional**, **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

When you enable Omni-Channel in your organization, Salesforce creates a presence configuration for you, called the Default Presence Configuration. All your agents are assigned to that configuration automatically. However, you can create a presence configuration and assign individual agents to it to customize Omni-Channel settings for a subset of your agents. If you reassign agents to a custom presence configuration, they're excluded from the Default Presence Configuration.

1. From Setup in Salesforce Classic, enter `Presence` in the Quick Find box, select **Presence Configurations**, then click **New**.
2. Choose the settings for your presence configuration.
3. Click **Save**.

Presence Configuration Settings
Customize your presence configuration settings to define the Omni-Channel settings that are assigned to agents.

Presence Configuration Settings

Customize your presence configuration settings to define the Omni-Channel settings that are assigned to agents.

Available in: Salesforce Classic, Lightning Experience

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Basic Information

These settings configure the basic functionality that's available to agents when they're signed in to Omni-Channel.

Setting	What It Does
Presence Configuration Name	Names the presence configuration.
	This configuration name, or a version of it, automatically becomes the `Developer Name`.
Developer Name	Sets the API name for the configuration.
Capacity	Determines the agent's maximum capacity for work. The size of the work item that you specified in the routing configuration consumes the agent's capacity.
Automatically Accept Requests	Automatically accepts work assignments that are pushed to an agent. These work items open automatically in the agent's workspace, so the agent doesn't have to accept these work items manually from the Omni-Channel footer component (or the utility in Lightning Experience).
	If `Allow Agents to Decline Requests` is enabled, you can't use this setting.

Setting	What It Does
Allow Agents to Decline Requests	Allows agents to decline incoming work items.
	If `Automatically Accept Requests` is enabled, agents can't decline requests.
Update Status on Decline	Automatically changes the agent's status to the status that you specify when the agent declines a work item.
	This setting is available only if `Allow Agents to Decline Requests` is enabled.
Allow Agents to Choose a Decline Reason	Allows agents to choose a reason when declining work assignments.
	This setting is available only if `Allow Agents to Decline Requests` is enabled.
Update Status on Push Time-Out	Automatically changes the agent's status when a work assignment that's been pushed to them times out.
	This setting is available only if `Push Time-Out` is enabled.
Request Sound Enabled	Plays a sound in the agent's widget when a work request is received.
Disconnect Sound Enabled	Plays a sound in the agent's widget when the agent loses connection with Omni-Channel.

Assign Decline Reasons

These settings appear when `Allow Agents to Decline Requests` and `Allow Agents to Choose a Decline Reason` are selected.

Setting	What It Does
Available Decline Reasons	Indicates the decline reasons that are eligible to be assigned to the configuration.
Selected Decline Reasons	Indicates the decline reasons that are assigned to the configuration.

Assign Users

Assign eligible users to the configuration to give them access to Omni-Channel functionality. Later, you'll see that you can also assign profiles to a configuration. If a user is assigned a configuration at the profile and user levels, the user-level configuration overrides the configuration that's assigned to the user's profile.

> ⚠️ **Warning:** Users can be assigned to only one presence configuration at a time. If you assign the same user to a second presence configuration, the system removes that user from the first presence configuration without warning you. So make sure that you know which presence configuration assignment is required for each user!
>
> For example, let's say that User A is assigned to Presence Configuration A. Then, you create Presence Configuration B and assign User A to it without realizing that the user was assigned to another presence configuration. Salesforce removes User A from Presence Configuration A and reassigns the user to Presence Configuration B without notifying you.

Setting	What It Does
`Available Users`	Indicates the users who are eligible to be assigned to the configuration.
`Selected Users`	Indicates the users who are assigned to the configuration.

Assign Profiles

Assign eligible profiles to the configuration to give users who are associated with the profiles access to Omni-Channel functionality. If a user is assigned a configuration at the profile and user levels, the user-level configuration overrides the configuration that's assigned to the user's profile.

Setting	What It Does
`Available Profiles`	Indicates the user profiles that are eligible to be assigned to the configuration.
`Selected Profiles`	Indicates the user profiles that are assigned to the configuration.

Create Presence Statuses

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline.

Available in: Salesforce Classic, Lightning Experience

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USER PERMISSIONS

To set up Omni-Channel:
- Customize Application

A presence status can encompass one or more channels of work items. For example, you might create a presence status called "Available for Web Support" that includes service channels for chats and emails. When agents are signed in to that presence status, they can receive incoming chats and emails. Genius!

1. From Setup in Salesforce Classic, enter `Presence` in the Quick Find box, select **Presence Statuses**, then click **New**.

2. Choose the settings for your presence status.

3. Click **Save**.

Customize your presence status settings to define which service channels are assigned to difference statuses. Agents can sign in to Omni-Channel with different statuses depending on the types of work that they're available to receive.

Presence Status Settings

Customize your presence status settings to define which service channels are assigned to difference statuses. Agents can sign in to Omni-Channel with different statuses depending on the types of work that they're available to receive.

Available in: Salesforce Classic, Lightning Experience

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Basic Information

Use these settings to name your presence status.

Setting	What It Does
Status Name	Names the presence status. This presence status name, or a version of it, automatically becomes the API Name.
API Name	Sets the API name for the presence status.

Status Options

These settings indicate whether agents are online or busy when they use this status.

Setting	What It Does
Online	Lets agents who use this status receive new work items.
Busy	Lets agents who use this status appear away and indicates that they're unable to receive new work items.

Service Channels

Assign service channels to your presence status. Agents who sign in with this presence status can receive work items from the channels that you select.

Setting	What It Does
Available Channels	Indicates the service channels that are eligible to be assigned to the presence status.
Selected Channels	Indicates the service channels that are assigned to the presence status.

Set Access to Presence Statuses

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Once you've created your Presence Statuses for Omni-Channel, you need to set up how your users will access them. You can set access through permission sets or profiles.

Available in: Salesforce Classic, Lightning Experience

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Give Users Access to Presence Statuses with Permission Sets

Make presence statuses available to agents who are assigned to certain permission sets.

Give Users Access to Presence Statuses with Profiles

Make presence statuses available to agents who are assigned to certain profiles.

Give Users Access to Presence Statuses with Permission Sets

Make presence statuses available to agents who are assigned to certain permission sets.

Available in: Salesforce Classic, Lightning Experience

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USER PERMISSIONS

To set up Omni-Channel:
- Customize Application

To modify permission sets:
- Manage Profiles and Permission Sets

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. You can give users access to presence statuses through permission sets, or alternatively, through profiles.

1. In Setup, enter `Permission Sets` in the Quick Find box, then select **Permission Sets**.

2. Click the name of the permission set to which you want to give access to statuses.

3. Click **Service Presence Statuses Access**.

4. Click **Edit**.

5. Select the presence statuses that you want to associate with the permission set.

   Agents who are assigned to this permission set can sign in to Omni-Channel with any of the presence statuses that you make available to them.

6. Click **Save**.

Give Users Access to Presence Statuses with Profiles

Make presence statuses available to agents who are assigned to certain profiles.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional**, **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. You can give users access to presence statuses through profiles, or alternatively, through permission sets.

1. In Setup, enter `Profiles` in the Quick Find box, then select **Profiles**.

2. Click the name of the profile to which you want to give access to statuses.

    Don't click **Edit** next to the profile name. If you do, you won't see the correct page section where you can enable statuses.

3. In the Enabled Service Presence Status Access section, click **Edit**.

4. Select the presence statuses that you want to associate with the profile.

    Agents who are assigned to this profile can sign in to Omni-Channel with any of the presence statuses that you make available to them.

5. Click **Save**.

Add the Omni-Channel Widget to the Salesforce Console

After you get Omni-Channel all set up for your organization, it's time to add the Omni-Channel widget to the Salesforce console so that your agents can start receiving work.

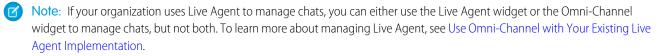Available in: Salesforce Classic, Lightning Experience

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The Omni-Channel widget appears in the bottom right corner of the Salesforce console. From there, agents can change their presence status and triage their incoming work assignments.

> Note: If your organization uses Live Agent to manage chats, you can either use the Live Agent widget or the Omni-Channel widget to manage chats, but not both. To learn more about managing Live Agent, see Use Omni-Channel with Your Existing Live Agent Implementation.

1. From Setup, enter `Apps` in the Quick Find box, then select **Apps**.

2. Click **Edit** next to the Salesforce console app that you want to add the Omni-Channel widget to.

3. In the Choose Console Components section, add Omni-Channel to your list of selected items.

4. Click **Save**.

Control Visible Work Item Details in Omni-Channel with Compact Layouts

Ever wanted to customize the information that your agents see when they get a new work item in Omni-Channel? You can! Just customize primary compact layout for that work item's object.

Control Visible Work Item Details in Omni-Channel with Compact Layouts

Ever wanted to customize the information that your agents see when they get a new work item in Omni-Channel? You can! Just customize primary compact layout for that work item's object.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional**, **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:
- Customize Application

If you look closely, you'll notice that a few fields are visible by default on new work item requests. For example, if your agent receives a request to manage a case, the request features the case's priority, status, and case number by default. An object's primary compact layout controls all of the visible fields in the Omni-Channel footer component (or Omni-Channel utility, if you're using Lightning Experience). But what if you want to see more information, such as the case's owner or its subject? Just edit the primary compact layout so that it includes the fields that you want to appear in the widget.

💡 **Tip:** The Omni-Channel footer component and Omni-Channel utility are, well, compact, so there's only so much room to display fields on work item requests. While you can technically put up to 10 fields on a compact layout, Omni-Channel displays only 4 fields. As a best practice, select up to 4 of the most important fields that you want to expose on work item requests, then add those to your compact layout.

1. Decide which object's compact layout you want to edit.

2. From the management settings for the object whose work item you want to edit, select **Compact Layouts**, and then select **New**.

   For example, to edit the compact layout for cases, go to the object management settings for cases, select **Compact Layouts**, then select **New**.

3. Select the settings for your compact layout, including the fields that you want it to include. The fields that you pick appear in Omni-Channel when an agent receives a request.

4. Click **Save**.

5. Change the primary compact layout to your new layout by clicking **Compact Layout Assignment** > **Edit Assignment**.

6. Select your new compact layout from the Primary Compact Layout drop-down list.

7. Click **Save**.

Add the Omni-Channel Utility to a Lightning Console App

Add the Omni-Channel utility to your Lightning Service console to route work to agents in a flash.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional**, **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:
- Customize Application

The Omni-Channel utility appears in the utility bar in your Lightning Console app. From there, agents can change their presence status and triage their incoming work assignments.

1. From Setup in Lightning Experience, enter *Apps* in the Quick Find box, then select **App Manager**.

2. Click the dropdown next to the console app your want to add Omni-Channel to, then click **Edit**.

3. Under Utility Bar, click **Add**.

4. Click **Omni-Channel**.

5. Click **Save**.

6. Click **Done**.

Test Your Omni-Channel Implementation

Now that you've got Omni-Channel set up and enabled, test your implementation to make sure it's working correctly.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional**, **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:
- Customize Application

To test your implementation, route a work item to yourself in the console.

1. Log in to the console where you added Omni-Channel.

   Make sure that you log in as a user who's enabled to use Omni-Channel. For the sake of testing the feature, make sure that you're the only agent who's signed into Omni-Channel.

2. Open Omni-Channel and change your status so that you can receive incoming work items.

3. In the console, navigate to the record that corresponds to the service channel you've set for your current presence status.

   For example, if you're logged in with a status that's called "Available for Cases," navigate to a list of your open cases in the console.

4. If you're using Salesforce Classic, select the checkbox next to the record that you want to route to yourself. If you're using Lightning Experience, open the record you want to route to yourself.

5. Click **Change Owner**.

6. Select *Queue*.

7. Enter the name of the queue that you associated with your routing configuration.

8. Click **Submit**.

Sit back and relax. You'll see an incoming request notification in Omni-Channel within a few seconds.

Use Omni-Channel with Your Existing Live Agent Implementation

Are you loving Live Agent and want to add Omni-Channel to the mix? Here's what changes for you and your organization (and not for your agents!).

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional**, **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

So, you've decided to take your customer service to the next level by using Live Agent and Omni-Channel in tandem. That's great! Once everything's set up, you'll find that the two work together in perfect harmony.

Live Agent is powered by Live Agent Configurations, which control the behaviors and settings that are available to Live Agent users. Similarly, Omni-Channel uses Presence Configurations to control the behaviors and settings that are available to Omni-Channel users. You can integrate Live Agent with Omni-Channel so chats are routed just like other work items, and you can even use Omni-Channel routing for your chats. Whichever way you use Omni-Channel with Live Agent, your agents are then able to accept or reject chat requests right from the Omni-Channel widget.

When you integrate Live Agent and Omni-Channel, your Live Agent users also become Omni-Channel users, so your chat agents need to be associated with both a Live Agent Configuration and a Presence Configuration. Luckily, Salesforce does some of the heavy lifting for you when you enable Omni-Channel with your current Live Agent implementation.

For each Live Agent Configuration that you already have in your org, Salesforce:

- Creates a corresponding Presence Configuration for each of your Live Agent Configurations
- Sets the chat capacity for each Presence Configuration to what's set in its corresponding Live Agent Configuration
- Assigns your chat agents to the new corresponding Presence Configurations

If you have Live Agent enabled but don't have an implementation, when you enable Omni-Channel, Salesforce creates a Live Agent Service Channel.

Salesforce does all this automatically so there's no disruption to your agents' workflow. They can start accepting chats through Omni-Channel in the console. The only difference they see is that they now use Omni-Channel in the console to set their status and accept chat notifications. They may also see a change in their status options, as Omni-Channel presence statuses are configurable.

If you want to use Live Agent and Omni-Channel in Lightning Experience, you must use Omni-Channel routing for your chats. All you have to do is create a chat button with the routing type Omni and assign your chat agents to queues. Then, add the Omni-Channel utility and Live Chat Transcripts to your Lightning Console app, and you agents can start accepting chat requests.

[Compare Live Agent and Omni-Channel Routing for Chats](#)
See the benefits and limitations of using Omni-Channel routing for chats or keeping Live Agent routing for chats. If you want to use Live Agent in Lightning Experience, you must use Omni-Channel routing.

Compare Live Agent and Omni-Channel Routing for Chats

See the benefits and limitations of using Omni-Channel routing for chats or keeping Live Agent routing for chats. If you want to use Live Agent in Lightning Experience, you must use Omni-Channel routing.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional**, **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

There's a lot to keep in mind as you decide whether to try Omni-Channel routing for chats. Omni-Channel routing for chats is enabled when:

- You enable Live Agent for the first time, or
- You create a chat button that uses the routing option **Omni-Channel Queues** or **Omni-Channel Skills**

Let's compare the two routing model options when using Live Agent and Omni-Channel together.

Live Agent Routing (Salesforce Classic only)	Omni-Channel Routing
Agents must chat with customers in the console in Salesforce Classic.	Agents can chat with customers in the console in either Salesforce Classic or Lightning Experience.
Agents use the Omni-Channel widget in Salesforce Classic to handle their work.	Agents use the Omni-Channel widget in Salesforce Classic or the Omni-Channel utility in Lightning Experience to handle their work.
Agents use Omni-Channel Presence, including its configurable statuses.	Agents use Omni-Channel Presence, including its configurable statuses.
Use Omni-Channel sound notifications in the Presence Configuration for chats.	Use Omni-Channel sound notifications in the Presence Configuration for chats.
Agent capacity is set and consumed by Omni-Channel.	Agent capacity is set and consumed by Omni-Channel.
Chats are routed to agents using Skills.	Chats are routed to agents using Omni-Channel queues.
Chats can't be prioritized with Omni-Channel work, or relative to each other. Omni-Channel work items that haven't yet been routed are always routed ahead of chats.	Chats are prioritized with Omni-Channel work, and can be prioritized relative to each other using queues.
Chats always have the size 1.	Chat size is configurable by queue.
Chat supervisors use the Live Agent Supervisor Panel to observe chats and assist agents with their chats.	Chat supervisors can view agent activity in Omni-Channel Supervisor, but they use the Live Agent Supervisor Panel to observe chats and assist agents with their chats. Create a skill for agents handling chats routed with Omni-Channel to make them visible in the Live Agent Supervisor Panel.
Reports and data for chats are separate from Omni-Channel data.	Chat data is included in Agent Work reports in addition to Live Agent reports.

Live Agent Routing (Salesforce Classic only)	Omni-Channel Routing
For a queue to appear as an option on the Live Agent chat button, the queue must include the Live Agent Sessions object in its support objects.	For a queue to appear as an option on the Live Agent chat button, the queue must include the Live Chat Transcript object in its supported objects.
The Live Chat Transcript is created when the chat ends.	The Live Chat Transcript is created when the chat is requested.
You can customize the Live Chat Transcript page layout for Ended chats.	In Salesforce Classic, you can customize the Live Chat Transcript page layout for Waiting, In Progress, and Ended chats. In Lightning Experience, you can customize Live Chat Transcript pages in the Lightning App Builder.
Agents associate records with the chat transcript only after the chat has ended.	Agents can associate records with the chat transcript during the chat. Agents can associate records on the chat transcript itself or use a console sidebar lookup component in Salesforce Classic.
Uses the Console Integration Toolkit Methods for Live Agent.	Uses the Console Integration Toolkit Methods for Omni-Channel for Salesforce Classic, or Omni-Channel Objects for the Lightning Console JavaScript API for Lightning Experience.
If you use the `findorCreate` code to find or create related records, the code triggers only when an agent accepts the chat request.	If you use the `findorCreate` code to find or create related records, the code triggers even if the chat visitor cancels the chat before the agent accepts.

However, there are a few limitations to using Omni-Channel routing for chats:

- You can't transfer a chat from a button using Live Agent routing to a button using Omni-Channel routing.
- You can't use direct-to-agent routing with chats routed by Omni-Channel.
- Queues with multiple object types can cause problems when using Omni-Channel routing. We recommend creating a queue for each object type, such as Chats, Cases, and Leads, instead of setting queues to handle multiple object types.
- When an agent uses "Transfer to Agent" for a chat routed with Omni-Channel and the receiving agent has an admin profile, the agent who initiated the transfer can lose visibility of the chat transcript until the receiving agent accepts the chat request. This situation occurs because Omni-Channel changes ownership of the chat transcript when the transfer is initiated, before the next agent accepts the chat.

Skills-Based Routing for Omni-Channel

Your agents have different skills sets and abilities. Your customers have different needs. Skills-based routing lets your contact center route work to the best agent for the job, so that customer work items are assigned to the agent who is best able to solve the issue. Skills-based routing improves the quality of customer service by automatically routing work items to the agent who has the skills necessary to do the work.

Available in: Salesforce Classic and Lightning Experience

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

How Does Skills-Based Routing Work?

Skills-based routing looks at the skills required to complete a work item (requested skills) and matches these skills to the skills that are assigned to the agent (agent's skills). Omni-Channel routes the work to the first agent who has all requested skills and who is available (that is, has the capacity to take the work item).

Available in: Salesforce Classic and Lightning Experience

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

Skills-based routing is supported on the following objects: Cases, Leads, Orders, Custom Objects, Live Agent chats, and LiveMessage sessions in Lightning Experience.

We use the term "work items" to refer to the cases, chats, leads, orders, and custom records that Omni-Channel routes.

You can define whatever skills that you need for your company. Skills typically are used to represent attributes such as language ability, product knowledge, certifications, case origin, and account history. For example, you could define skills for language (Spanish, French, and English); for product knowledge (software and hardware); and for certifications (CompTIA, CCNP).

Assign each agent a skill and optionally assign a skill proficiency level (0–10, where 0 indicates the lowest skill level and 10 indicates the highest level). For example, an agent who speaks fluent Spanish could have the skill = Spanish and the proficiency level = 10 for expert.

Skills are assigned to incoming work items by the SkillRequirements object in the API. The PendingServiceRouting object adds attributes to the work item that represent the skill (skill id), priority, skill proficiency, and timestamp.

Work items are routed by creating a PendingServiceRouting object. The PendingServiceRouting object can have multiple SkillRequirements objects associated with it.

When a work item requires multiple skills, it's routed to an agent who possesses all of the required skills.

When multiple agents have the same skill, the work item is routed to the agent who is first available based on the routing type (either most available or least active) that you use in your org. If the agent doesn't accept the work item, then it's routed to the next available agent. The Salesforce API remembers the agent who last declined the work (Last Declined Agent) or who last didn't accept the work within the specified time (Push Timeout), and doesn't route the work to that agent again.

Omni-Channel for Administrators

How Does Skills-Based Routing Differ from Queue-Based
Routing?

Set the push timeout on the PendingServiceRouting object to automatically push work to another agent if the first agent doesn't accept the work within a specified time.

Agents can transfer a work item to another skill on page 31. For example, if an agent accepts a case but realizes that she doesn't have the right skills, she can specify the required skills and transfer the case. The case is transferred to an agent who possesses at least all of the required skills.

Supervisors can monitor agent workload and unassigned work items in Omni-Channel Supervisor. The Agent Summary tab shows agent availability, capacity, and what work items agents are working on. The Skills Backlog tab shows work items that aren't assigned to an agent, and it shows which skills are needed for the work item.

SEE ALSO:

Omni-Channel Developer Guide: PendingServiceRouting

SOAP API Developer Guide: SkillRequirement

Transfer a Work Item to a Different Skill Set

The Routing Lifecycle

How Does Skills-Based Routing Differ from Queue-Based Routing?

Skills-based routing allows work items to be routed using more sophisticated and dynamic criteria than queue-based routing.

Available in: Salesforce Classic and Lightning Experience

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

Queues generally are designed to represent a single skill. For example, you might have a Spanish-language queue and a Level 3 technical support queue.

Queues route work to agents who are members of the queue. Although you can have multiple queues, and agents can be members of multiple queues, a work item can be assigned only to one queue at a time.

In contrast, skills-based routing looks at the skills required to complete the work item, identifies agents who have those skills, and routes the work item to an agent who has all of the requisite skills and who has available capacity to take on the work.

Considerations

Skills-based routing is set up using the Salesforce setup pages and the API. Administrators who are setting up skills-based routing should be familiar with Apex and using the API.

Available in: Salesforce Classic and Lightning Experience

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

Skills-Based Routing Limitations

Skills-based routing has the following limitations.

Available in: Salesforce Classic and Lightning Experience

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

Skills-based routing isn't supported for external routing.

Skills-based routing for Omni-Channel is supported only on the following objects: Cases, Live Agent Chats, LiveMessage sessions, Leads, Orders, and Custom Objects. You can't route SOS video chats, or Salesforce records for other objects using skills-based routing.

If a work item requires certain skills, but no agents have those skills, then the work item isn't routed. This situation is similar to how items in a queue are treated when no agents are online. If your org uses Omni-Channel Supervisor, the support manager can look at the Skills Backlog and see which work items haven't been assigned to an agent.

Set Up Skills-Based Routing

Follow these steps to set up skills-based routing for Omni-Channel in your org.

Available in: Salesforce Classic and Lightning Experience

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

The setup instructions start at the beginning and assume that you aren't using Omni-Channel. If you're already using Omni-Channel in your org, that's great! In that case, start by reviewing the considerations on page 23 and limitations on page 23, and then enable skills-based routing on page 25.

You can route different work items in the same org using queue-based routing and skills-based routing. To use both types of routing, set up queue-based routing to route certain work items and set up skills-based routing to route other work items.

1. Enable Omni-Channel

   Enable Omni-Channel to gain access to the objects that you'll use to set up the feature in your organization.

2. Enable Skills-Based Routing

   Enable skill-based routing in your org.

3. Create Skills for Skills-Based Routing

   Skills identify your agents' areas of expertise.

4. Create Service Resources for Agents

   Service resources represent individual agents. Create a service resource for each agent.

5. Assign Skills to Service Resources

   Assign skills to your agents to track their areas of experience and their level of proficiency for each skill.

6. Route Work Items Using Skills

   To route work items using skills, create a PendingServiceRouting object and the associated SkillRequirement objects. The PendingServiceRouting object is a standard Salesforce object that represents the work item that is going to be routed. The SkillRequirement object is a standard Salesforce object that represents the skill and the proficiency level.

Enable Omni-Channel

Enable Omni-Channel to gain access to the objects that you'll use to set up the feature in your organization.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional**, **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

1. From Setup, enter `Omni-Channel Settings` in the Quick Find box, then select **Omni-Channel Settings**.
2. Select **Enable Omni-Channel**.
3. Click **Save**.

Enable Skills-Based Routing

Enable skill-based routing in your org.

Available in: Salesforce Classic and Lightning Experience

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

🛑 **Important:** Previously, if you used queue-based routing in your org and you switched to using skills-based routing before Winter '19, Omni-Channel stopped routing work to queues. When Winter '19 was released to your org, Omni-Channel resumed routing work to queues in addition to routing work to skills.

1. From Setup, enter `Omni-Channel` in the Quick Find box, then select **Omni-Channel Settings**.
2. Select **Use Skills-Based Routing**.
3. Click **Save**.

Create Skills for Skills-Based Routing

Skills identify your agents' areas of expertise.

Available in: Salesforce Classic and Lightning Experience

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

Agents can transfer work items to skills, so an agent with the right skills can resolve the issue.

When agents open the transfer dialog and search for skills, the search process looks for matching skills within only the first 2,000 skills. If more than 2,000 skills are set up, then the search results show matching skills from only the first 2,000 skills that were created.

1. From Setup, enter `Omni-Channel` in the Quick Find box, then select **Skills**.
2. Click **New**.

3. Enter a name for the skill.

For example, you can create a skill that's called "Spanish" to denote agents who speak Spanish.

4. Optionally, enter a description of the skill.

5. Skip the Assign Users and Assign Profiles sections. Instead, add these skills to service resources.

6. Click **Save**.

SEE ALSO:

Transfer a Work Item to a Different Skill Set

Create Service Resources for Agents

Service resources represent individual agents. Create a service resource for each agent.

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create service resources:
- "Create" on service resources

📝 **Note:** The visibility of the Service Resource tab might be turned off by default. If you don't see it, check the tab visibility. For more details, see the topic Tab Settings in Salesforce Help.

1. Open the Service Resources tab.

2. Click **New**.

3. For **Name**, enter the name of the agent.

4. Select the **Active** checkbox.

A service resource must be active to receive work items.

5. For **User**, use the lookup icon to select the agent.

6. For **Resource Type**, select *Agent*.

7. Click **Save**.

Assign Skills to Service Resources

Assign skills to your agents to track their areas of experience and their level of proficiency for each skill.

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To assign skills to service resources:
- "Edit" on service resources

Create skills before you can assign skills to agents.

1. Open the Service Resources tab.

2. Select the service resources that you want to assign skills to.

3. In the Skills related list, click **New Service Resource Skill**.

4. Select a skill.

   Skills must be created before they can be assigned to a resource; to learn how, see topic Create Skills for Skills-Based Routing in Salesforce Help.

5. Optionally, enter a skill level 0–10 based on how your business measures skill level.

6. Enter a start date, and if needed, an end date.

   For example, if an agent must be recertified in a skill every six months, enter an end date that's six months later than the start date.

7. Click **Save**.
   The service resource's skill now appears in their Skills related list.

Route Work Items Using Skills

To route work items using skills, create a PendingServiceRouting object and the associated SkillRequirement objects. The PendingServiceRouting object is a standard Salesforce object that represents the work item that is going to be routed. The SkillRequirement object is a standard Salesforce object that represents the skill and the proficiency level.

Available in: Salesforce Classic and Lightning Experience

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

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This example shows a sample process that uses an Apex action class to create the PendingServiceRouting object and the SkillRequirement object. The example assumes that there's a Service Channel object with the DeveloperName "Case." It assumes that there are skill objects with the DeveloperNames "English," "French," and "Spanish."

Define an Apex Action Class for a Skills-Based Workflow

Define an Apex class that routes work items using skills. Here's an example of an Apex action class for skills-based routing that creates the PendingServiceRouting object and SkillRequirement object.

Create a Process to Trigger Skills-Based Routing

Use the Process Builder to define a process that triggers skills-based routing. In this example, the process operates on the Case object and triggers the Apex action class when a case record is created.

SEE ALSO:

The Routing Lifecycle

Define an Apex Action Class for a Skills-Based Workflow

Define an Apex class that routes work items using skills. Here's an example of an Apex action class for skills-based routing that creates the PendingServiceRouting object and SkillRequirement object.

Available in: Salesforce Classic and Lightning Experience

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

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USER PERMISSIONS

To define and edit Apex classes:
- "Author Apex"

27

See the Salesforce Developer Guide for details about these objects:

- PendingServiceRouting
- ServiceResources
- SkillRequirement

When you create a skills-based PendingServiceRouting object, make sure that any existing code (including triggers and workflows, etc.) doesn't simultaneously add work items to an Omni-Channel queue.

📝 **Note:** By default, the Skill Level field is protected by field-level security. You might need to change the access level for this field so your users can create the SkillRequirement object with Skill Levels.

1. From Setup, enter *Apex* in the Quick Find box, then select **Apex Classes**.

2. Click **New**.

3. In the **Apex Class** field, enter the Apex code similar to what's shown in the example.

4. Click **Save**.

👁 Example:

```
Global class SkillsBasedRouting {
    @InvocableMethod
    public static void routeUsingSkills(List<String> cases) {
        List<Case> caseObjects = [SELECT Id, Description FROM Case WHERE Id in :cases];

        for (Case caseObj : caseObjects) {
            try {
                // Create a PendingServiceRouting to initiate routing
                createPendingServiceRouting(caseObj);
            } catch(exception e) {
                System.debug('ERROR:' + e.getStackTraceString());
                throw e;
            }
        }
    }

    static void createPendingServiceRouting(Case caseObj) {
        // Create a new SkillsBased PendingServiceRouting
        PendingServiceRouting psrObj = new PendingServiceRouting(
            CapacityWeight = 1,
            IsReadyForRouting = FALSE,
            RoutingModel  = 'MostAvailable',
            RoutingPriority = 1,
            RoutingType = 'SkillsBased',
            ServiceChannelId = getChannelId(),
            WorkItemId = caseObj.Id,
            PushTimeout = 0
        );
        insert psrObj;
        psrObj = [select id, IsReadyForRouting from PendingServiceRouting where id =
: psrObj.id];

        // Now add SkillRequirement(s) to the PendingServiceRouting
        SkillRequirement srObj = new SkillRequirement(
            RelatedRecordId = psrObj.id,
```

```
        SkillId = getSkillId(caseObj.Description),
        SkillLevel = 5
    );
    insert srObj;

    // Update PendingServiceRouting as IsReadyForRouting
    psrObj.IsReadyForRouting = TRUE;
    update psrObj;
}

static String getChannelId() {
    ServiceChannel channel = [Select Id From ServiceChannel Where RelatedEntity =
'Case'];
    return channel.Id;
}

static String getSkillId(String caseDescription) {
    String skillName = 'English';
    if (caseDescription != null) {
        if (caseDescription.contains('Spanish')) {
            skillName = 'Spanish';
        } else if (caseDescription.contains('French')) {
            skillName = 'French';
        }
    }

    Skill skill = [Select Id From Skill Where DeveloperName = :skillName];
    return skill.Id;
}
}
```

After defining the Apex action class, create a workflow on page 29 that triggers the Apex action class on work items.

Create a Process to Trigger Skills-Based Routing

Use the Process Builder to define a process that triggers skills-based routing. In this example, the process operates on the Case object and triggers the Apex action class when a case record is created.

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create, edit, or view processes:
- "Manage Flow" AND "View All Data"

Before you start, define the Apex action class on page 27 that creates the PendingServiceRouting object and SkillRequirement object.

1. From Setup, enter Process Builder in the Quick Find box, then select Process Builder.

2. Click **New**.

3. In the New Process modal window, complete the following fields:

   a. For **Process Name**, specify the name for this process, such as "Skills-based routing."

   b. The **API Name** is automatically populated.

c. For **Description**, optionally describe what this process does.

d. For **This process starts when**, select **A record changes**.

4. On the next page, in the **Choose Object and Specify When to Start the Process** configuration, select the **Case** object.

5. For **Start the process**, select **Only when a record is created**.

6. Click **Save**.
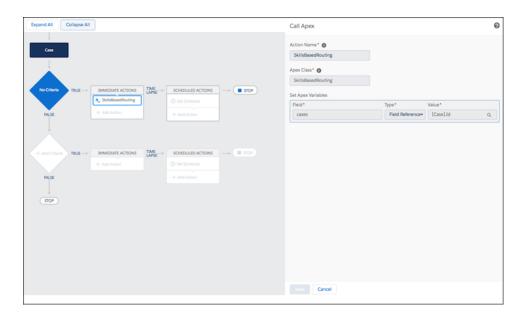   In the diagram, the Add Object box is changed to Case.

7. Click the **Add Criteria** diamond.

8. For **Criteria for Executing Actions**, select **No criteria--just execute the actions!**

9. Click **Save**.

10. In the **Immediate Actions** box, click **Add Action**.

11. In **Action Type**, select **Apex**.

12. For **Action Name**, enter the name of your action.

13. For **Apex Class**, enter the name of the Apex class that you created.

14. For **Set Apex Variables**, set the following parameters:

    a. For **Field**, select **cases**.

    b. For **Type**, select **Field Reference**.

    c. For **Value**, use the lookup icon to select **[Case].Id**.

15. Click **Save**.
    The activation window opens.

16. To activate this process, click **Confirm**.
    The activation window closes. When a case is created, it triggers this process and routes the case based on skills.

👁 Example:

Transfer a Work Item to a Different Skill Set

You can transfer a work item, such as a case, to a different skill set, so an agent with the right skills can resolve the issue.

Available in: Lightning Experience

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

When agents open the transfer dialog and search for skills, the search process looks for matching skills within only the first 2,000 skills. If more than 2,000 skills are set up, then the search results show matching skills from only the first 2,000 skills that were created.

Work items are transferred to an agent who possesses all of the required skills. If an agent who has all of the required skills isn't available, then the work item is not assigned. Supervisors can manually assign the work item to an agent.

If the transferring agent possesses all of the required skills, then the work item can be reassigned to that agent.

When a work item is transferred, the status changes to *Transferred*.

> 📝 Note: The transfer to skill dialog isn't supported in Salesforce Classic. Agents using Salesforce Classic can accept work items that are transferred to skills, but they can't transfer work items to skills.

1. Click the transfer icon.

   The transfer dialog is displayed. The transfer dialog shows the skills that are attached already to the work item.

2. Search for the skill that the work item needs.

3. To add the skill to the work item, select the skill.

   You can add several skills to the work item. For example, you could select billing and Spanish for a case that needs a Spanish-speaking agent who's knowledgeable about your company's billing practices. First, search for the "billing" skill and add it. Next, search for "Spanish" and add it, and so on.

4. Click **Transfer**.
   The work item is transferred to an agent who has the required skills. If there isn't an agent available with the required skills, then the work item isn't assigned and is shown in the Skills Backlog tab in Omni-Channel Supervisor. When an agent with the required skills becomes available, Omni-Channel routes the work to that agent.

Use External Routing for Omni-Channel

Integrate third-party routing with a partner application with Omni-Channel using Salesforce standard APIs and streaming APIs. External routing is supported with Omni-Channel in both Salesforce Classic and Lightning Experience.

Available in: Salesforce Classic and Lightning Experience

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

Multiple routing options, one console. Give your agents more routing options by integrating an external routing implementation with Omni-Channel. Learn more about external routing and how to set it up in the Omni-Channel Developer Guide.

Omni-Channel Reference

Understand how Omni-Channel routing works and reference the fields for agent work records and user presence records.

The Routing Lifecycle

When you dig more deeply into Omni-Channel and the routing process, there are two particular objects that are worth understanding better: PendingServiceRouting (PSR) and AgentWork.

How Does Omni-Channel Queue-Based Routing Work?

Do data models make your heart skip a beat? Want to understand the ins and outs of how Omni-Channel routes work items to your agents? Then we have a treat for you. Omni-Channel pushes work items to the right agent at the right time so that your support team can efficiently help customers with their problems. But how does queue-based routing work under the hood? Let's dive in.

Fields for Agent Work Records

Every time an object is routed to an agent through Omni-Channel, Salesforce creates an Agent Work record that logs information about the work assignment and how it's routed. Agent Work records contain fields that help you track information about the assignments your agents are working on. If the same work item is routed multiple times, that work item is associated with multiple Agent Work records.

Fields for User Presence Records

Every time agents change their Presence Statuses in Omni-Channel, Salesforce creates a User Presence record to log all of the agents' activities while they're signed logged in with that status. User Presence records contain fields that help you track information about your agents' availability.

The Routing Lifecycle

When you dig more deeply into Omni-Channel and the routing process, there are two particular objects that are worth understanding better: PendingServiceRouting (PSR) and AgentWork.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional**, **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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What Is PSR? What Is AgentWork?

PSR (PendingServiceRouting) is a Salesforce object that gets created when work is routed using Omni-Channel. PSR is a transient object that contains routing information about a work item that is in the midst of being routed. In most scenarios, the system automatically creates the object; in a few scenarios (like when using skills-based routing with non-real-time channels), you must create this object. The PSR is deleted by the system when an agent accepts the work item.

AgentWork is a Salesforce object that automatically gets created when the routing system finds a potential agent to handle the work item. It contains information about the work item and the routing status. This object is never automatically deleted, but you can manually delete it when the State field is in a non-active state. (Active states are Assigned and Opened. All other states are considered non-active states.)

Why Should I Care?

When you're using skills-based routing (SBR) with non-real-time channels, you must manually create the PSR record (using Apex or an invocable action) to initiate the routing process.
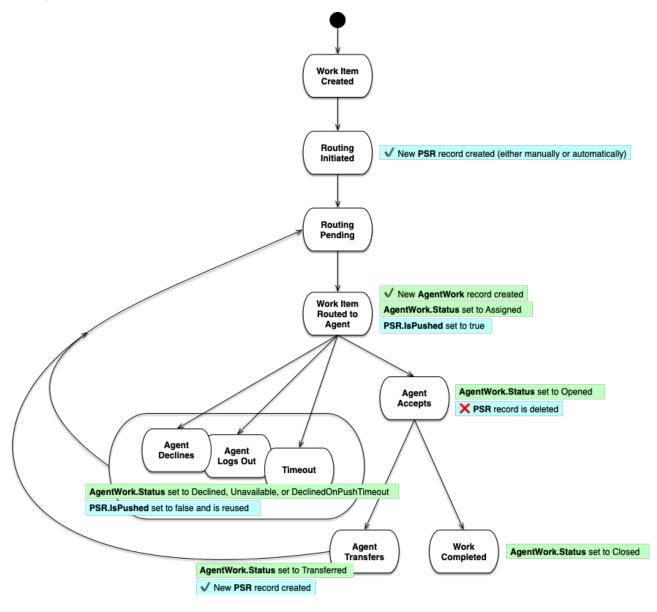
In queue-based routing or skills-based routing using a real-time channel (like LiveMessage and Chat), the PSR record is created automatically. However, you still may want to access this object for more complex use cases or for troubleshooting.

What Is the Basic Lifecycle?

In the simplest scenario, a PSR record is created when a work item is routed using Omni-Channel. When the system finds a potential agent to handle the work item, an AgentWork record is created. When an agent accepts the work item, the system deletes the PSR record. The AgentWork record is never deleted automatically by the system, but it can be deleted manually when it enters a non-active state (such as Closed, Unavailable, Declined, Canceled, Transferred).

What Is the Detailed PSR and AgentWork Lifecycle?

To fully understand the lifecycle of these two objects, refer to this state diagram. In addition to the creation and deletion of PSR and AgentWork records, this diagram describes the `PSR.IsPushed` state and the `AgentWork.Status` value in different phases of the lifecycle.

The PSR record is transient whereas the AgentWork record sticks around until it is explicitly deleted.

How Does Omni-Channel Queue-Based Routing Work?

Do data models make your heart skip a beat? Want to understand the ins and outs of how Omni-Channel routes work items to your agents? Then we have a treat for you. Omni-Channel pushes work items to the right agent at the right time so that your support team can efficiently help customers with their problems. But how does queue-based routing work under the hood? Let's dive in.

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Omni-Channel routes work through two separate processes.

- First, when a new work item is assigned to an Omni-Channel queue, Omni-Channel attempts to route it to an agent. Omni-Channel routes work items by the priority of the queue that they're assigned to, so the most important work items are pushed to agents first. Next, items are routed based on how long they've been sitting in the queue. The oldest work items are pushed to agents before more recent ones. (Let's talk about the details of how that happens in a minute.)

- Second, when an agent's ability to receive work changes (perhaps they come back from "away" status, or they finish another work item), Omni-Channel tries to find work that can be routed to that agent.

Routing New Work Items

When a work item is created, it gets assigned to a queue. If that queue is associated with a Routing Configuration, it's added to a list of items that are still waiting to be routed to agents.

Then Omni-Channel determines which agents are available and how much work each agent is working on. This information comes from the UserServicePresence API object, which tracks an agent's current capacity for work items.

Routing Pending Work Items

When a new work item is added to the list of pending items, Omni-Channel determines whether it can immediately route the work item to an agent.

First, Omni-Channel identifies if any agents are online with a Presence Status that's linked to the correct Service Channel. Let's say your organization receives a new case that's assigned to an Omni-Channel queue. Omni-Channel determines if there's a Service Channel for cases. Then it checks which agents are online with a status that lets them receive new work items.

Scenario	What Happens
No agents are available.	If there isn't an agent online who has the right status, Omni-Channel keeps the work item in the list of items that need to be assigned to an agent.
Agents are available, but don't have capacity for new work.	If there are one or more agents who are available, Omni-Channel checks to see if any of those agents have the capacity to take on a new work item. If there are no agents with enough capacity for more work, it leaves the work item in the list.

Scenario	What Happens
Agents are available and have capacity for more work.	If there are agents that 1) are available and 2) have capacity to work on the item, Omni-Channel checks which agent to send the work to based on your organization's routing settings. **If your routing configuration uses the Least Active routing model**, Omni-Channel looks for the agent who currently has the least amount of work compared to other agents who could take on the work item. It then routes the work item to that agent. **If your routing configuration uses the Most Available routing model**, Omni-Channel looks for the agent who has the largest gap between the maximum amount of work that they can handle and the amount of work that they are working on. It then routes the work item to that agent. **But what if there's a tie between two or more agents?** In that case, Omni-Channel routes the work to the agent who received a work item the longest ago. Suppose that Agent A received work 10 minutes ago and closed it 2 minutes ago. Agent B received work 8 minutes ago and closed it 5 minutes ago. In this situation, the work would go to Agent A.

When an Agent's Ability to Receive Work Changes

When an agent logs in to Omni-Channel, finishes a work item, or changes status, Omni-Channel checks to see if there is any work that it can route to the agent.

Scenario	What Happens
The agent is away.	Omni-Channel looks for another agent who can take the work.
The agent is available, but doesn't have capacity for work.	Omni-Channel looks for another agent who can take the work.
The agent is available and has capacity for more work	Omni-Channel looks at the list of work items that are waiting to be routed to an agent. It checks to see if the agent is qualified to work on any of the objects, based on how much of the agent's capacity the objects will take up, and the service channel that's associated with the agent's status. For example, if the agent is online with a status that makes them available for cases, it checks the list to see if there are any cases. If the list has work items that the agent is qualified to work on, then the item with the highest priority is routed to the agent. If two or more items have the same priority, the oldest one is routed.

Rerouting a Work Item

Sometimes an agent declines a work item or changes their presence status and are no longer available to accept work. In that case, the work item is rerouted until it finds a qualified agent.

Here's what happens. First, Omni-Channel automatically changes the owner of the work item to the queue from which the object was originally routed. If an agent (Agent A) declines a work item, then Omni-Channel looks for another agent (Agent B) to route it to. However, the work item can be routed to Agent A again if Agent B declines it.

If an agent changes their status and is unavailable, then Omni-Channel looks for another agent to route the work to.

Omni-Channel repeats this process until the work item is routed to a qualified agent.

Assignment Rules, Auto-Response Rules, Escalation Rules, and Workflow Rules

Automation rules, such as assignment, auto-response, escalation, and workflow rules, aren't triggered when Omni-Channel routes a work item to an agent and the agent accepts the work.

When an agent accepts the work and then edits and saves the work item record, automation rules are triggered.

Fields for Agent Work Records

Every time an object is routed to an agent through Omni-Channel, Salesforce creates an Agent Work record that logs information about the work assignment and how it's routed. Agent Work records contain fields that help you track information about the assignments your agents are working on. If the same work item is routed multiple times, that work item is associated with multiple Agent Work records.

An Agent Work record has the following fields, listed in alphabetical order.

Field	Definition
Accept Date	The date and time that the work item was accepted by an agent.
Active Time	The amount of time an agent actively worked on the work item. It tracks when the item is open and in focus in the agent's console.
Agent Capacity when Declined	The amount of an agent's capacity that was available when the agent declined the work item.
Agent Work ID	The Salesforce ID of the Agent Work record.
Assign Date	The date and time that the work item was assigned to an agent and pushed to the agent.
Cancel Date	The date and time that the work item was canceled.
Close Date	The date and time that the agent closed the console tab associated with the work item, setting the Agent Work record's status to "Closed."
Created By	The name of the agent who accepted the work item.
Created Date	The date that the work item was created.
Decline Date	The date that an agent declined the work item request.
Decline Reason	The provided reason for why an agent declined the work request.
Handle Time	The amount of time an agent has the work item open, from the accepted time to the closed time.
Last Modified By	The name of the user who last modified the work item.

Field	Definition
Last Modified Date	The date the work item was last modified.
Live Agent Session ID	The session ID for Live Agent chats routed with Omni-Channel.
Name	The unique, Salesforce-generated number of the Agent Work record.
Percentage of Capacity	The percentage of capacity that the work item consumes of the agent's total, possible capacity.
Push Time-Out	The number of seconds set for push time-out. 0 is returned when push time-out isn't enabled.
Push Time-Out Date	The date and time when push time-out occurred.
Queue	The Salesforce queue from which the work item was routed.
Request Date	The date and time that the Salesforce object was assigned to the queue, creating the associated work item.
Service Channel	The service channel that's associated with the work item.
Should Skip Capacity Check	Indicates whether the check for an agent's available capacity is skipped (true) or not (false) when an externally routed work item is created. This field is used when agents can simultaneously handle work from both Omni-Channel queues and queues using external routing. When true, the receiving agent may exceed their set capacity to accept the item, but they don't receive more Omni-Channel routed work. When false, the receiving agent can't exceed their set capacity and must have enough open capacity to accept the item.
Speed to Answer	The amount of time in seconds between the time the work item was created (the Request Date) and the time the work item was accepted by an agent (the Accept Date).
Status	The status of the Agent Work record. Valid values are: • Assigned – The item is assigned to the agent but hasn't been opened. • Opened – The item was opened by the agent. • Unavailable – The item was assigned to the agent but the agent became unavailable (went offline or lost connection). • Declined – The item was assigned to the agent but the agent explicitly declined it. • DeclinedOnPushTimeout – The item was declined because push time-out is enabled and the item request timed out with the agent. • Closed – The item is closed.

Field	Definition
	• Canceled – The item no longer needs to be routed. For example: a chat visitor cancels their Omni-Channel routed chat request before it reaches an agent.
Units of Capacity	The number of units of an agent's capacity that the work item consumes of the agent's total, possible capacity.
User	The name of the agent to whom the work item was routed.
Work Item	The name of the work item that's associated with the Agent Work record—for example, "Case 123456."

Fields for User Presence Records

Every time agents change their Presence Statuses in Omni-Channel, Salesforce creates a User Presence record to log all of the agents' activities while they're signed logged in with that status. User Presence records contain fields that help you track information about your agents' availability.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional**, **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

A User Service Presence record has the following fields, listed in alphabetical order. Depending on your field-level security settings, some fields might not be visible or editable.

Field	Definition
At Capacity Duration	The amount of time in seconds that the agent was working at 100% of the agent's capacity, as indicated in the agent's Presence Configuration.
Configured Capacity	The agent's overall capacity, as indicated in the agent's Presence Configuration.
Created By	The name of the agent who set the Presence Status in Omni-Channel.
Created Date	The date when the User Presence record was created.
Idle Duration	The amount of time in seconds that the agent was assigned no work items.
Is Away	Indicates whether the agent's status is a "busy" status.
Is Current Status	Indicates whether the agent's Presence Status in the Service Presence Status field is the agent's current Presence Status.
Last Modified Date	The date the User Presence record was last modified.

Field	Definition
Service Presence Status	The API name of the Presence Status the agent used to log in to Omni-Channel.
Status Duration	The amount of time in seconds that the agent's status was set to the Presence Status indicated by the Status Name field.
Status End Date	The date and time that the agent logged out of Omni-Channel or changed to another Presence Status.
Status Start Date	The date and time that the agent set the Presence Status.
User	The name of the agent who is signed in to Omni-Channel.
User Presence ID	The autogenerated Salesforce ID of the User Presence record.
Alias	The agent's custom name.
Username	The agent's Salesforce username.
Status Name	The name of the Presence Status the agents used to log in to Omni-Channel.

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