
Set Up SOS Video Chat and Screen-Sharing

Salesforce, Spring '16



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SET UP SOS VIDEO CHAT AND SCREEN-SHARING

Want to connect with your customers in a whole new way? SOS is the Service Cloud's mobile support solution. With SOS, you can add a help button to your native iOS or Android mobile application so your customers can connect with agents over a one-way video and two-way audio chat.

Gone are the days when your customers had to connect with a nameless, faceless agent over the phone. With one click, your customers can video chat with agents who provide personalized, in-app guidance with screen-sharing and annotations.

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in:
Enterprise, Performance, Unlimited, and Developer Editions



Set Up SOS Video Chat and Screen-Sharing

SOS is integrated into the Salesforce console for the Service Cloud. Your agents can access cases, account records, and customer information quickly and easily during their video calls. Agents can also draw on customers' screens during an SOS session, giving your customers in-app guidance to solve their problems. Your customers get a comprehensive, personal support experience, and your agents have the information they need in the console to solve customer issues.

Even better, SOS is fully integrated into Omni-Channel, the Service Cloud's routing engine. Use Omni-Channel to customize how work items—including SOS video calls—are routed to your agents. Route SOS calls to the most available, capable agents in your organization in real time.—no third-party routing engine required!

For more information on integrating SOS into your mobile applications, see the *SOS iOS SDK*.

Before you set up SOS, enable Omni-Channel in your organization.

IN THIS SECTION:

1. [Assign SOS Licenses to Agents](#)

Each agent who uses SOS must have an SOS license and be part of a permission set that enables the SOS license.

2. [Enable the SOS License](#)

Use a permission set to enable the SOS license for your users.

3. [Create an SOS Presence Status](#)

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Create a presence status that lets your agents indicate that they're online and available to receive SOS calls.

4. [Give Users Access to SOS Presence Statuses with 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. Give SOS agents access to the SOS presence status so they can start receiving SOS calls.

5. [Give Users Access to Your SOS Presence Statuses with Profiles](#)

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Give SOS agents access to the SOS presence status so they can start receiving SOS calls.

6. [Create an SOS Routing Configurations](#)

Routing configurations determine how work items are routed to agents. They let you 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. Create an SOS routing configuration to determine how SOS calls are dispersed to your agents.

7. [Create an SOS Queue](#)

Queues are a classic element of Salesforce that help your teams manage leads, cases, service contracts, and custom objects. Omni-Channel supercharges queues to route work items to agents in real time. Create an SOS queue to funnel SOS calls to SOS agents. We'll associate the SOS queue with the SOS routing configuration we created earlier.

8. [Update Your Salesforce Console Settings](#)

After you get SOS all set up for your organization, it's time to a few settings in your Salesforce console so that your agents can start receiving work.

9. [Create an SOS Deployment](#)

Create an SOS deployment to integrate your SOS settings from Salesforce into your mobile application.

Assign SOS Licenses to Agents

Each agent who uses SOS must have an SOS license and be part of a permission set that enables the SOS license.

1. From Setup, enter *Users* in the *Quick Find* box, then select **Users**.
2. Select the user that you want to assign an SOS license to.
3. Click **Permission Set License Assignments**.
4. Click **Edit Assignments**.
5. Check the **Enabled** checkbox for **SOS User**.
6. Click **Save**.

EDITIONS

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Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To set up SOS:

- "Customize Application"

Enable the SOS License

Use a permission set to enable the SOS license for your users.

You can add only users who have been assigned the SOS license to the permission set.

1. From Setup, enter *Permission Sets* in the *Quick Find* box, then select **Permission Sets**.
2. Select the SOS permission set.
If you don't have an SOS permission set, create one. For *User License*, select *None*.
3. Click **App Permissions**.
4. Click **Edit**.
5. Select **Enable SOS Licenses**.
6. Click **Save**.

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Available in: Salesforce Classic

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Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To set up SOS:

- "Customize Application"

Create an SOS Presence Status

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Create a presence status that lets your agents indicate that they're online and available to receive SOS calls.

A presence status can be associated with one or more channels of work items. Associate the SOS presence status with the SOS service channel. That way, your agents can receive SOS calls when they're signed in with the SOS presence status.

1. From Setup, enter *Presence* in the *Quick Find* box, select **Presence Statuses**, then click **New**.
2. Name your status.
Let's call our status "Available for SOS." A version of that name becomes the Developer Name automatically.
3. In the Status Options section, select **Online**.
4. In the Service Channels section, add SOS to the Selected Channel list.
5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To set up SOS:

- "Customize Application"

Give Users Access to SOS Presence Statuses with 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. Give SOS agents access to the SOS presence status so they can start receiving SOS calls.

Alternatively, you can give users access to presence statuses through profiles.

1. From Setup, enter *Permission Sets* in the *Quick Find* box, then select **Permission Sets**.
2. Click the name of the permission set that contains your SOS agents.
3. Click **Service Presence Statuses Access**.
4. Click **Edit**.
5. Select the SOS presence status that we created earlier, "Available for SOS."
6. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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USER PERMISSIONS

To set up SOS:

- "Customize Application"

To modify permission sets:

- "Manage Profiles and Permission Sets"

Give Users Access to Your SOS Presence Statuses with Profiles

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Give SOS agents access to the SOS presence status so they can start receiving SOS calls.

Alternatively, you can give users access to presence statuses through permission sets.

1. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles**.
2. Click the name of the profile that contains your SOS agents.
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 your SOS presence status, "Available for SOS," to associate it with the profile.
5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS

To set up SOS:

- "Customize Application"

To modify profiles:

- "Manage Profiles and Permission Sets"

Create an SOS Routing Configurations

Routing configurations determine how work items are routed to agents. They let you 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. Create an SOS routing configuration to determine how SOS calls are dispersed to your agents.

After you create this configuration, we'll create an SOS queue for your SOS calls. Then, we'll associate our routing configuration with our SOS queue so that your agents can receive calls after we get SOS set up.

1. From Setup, enter *Routing* in the **Quick Find** box, select **Routing Configurations**, then click **New**.
2. Name your routing configuration.
Let's call our routing configuration "SOS Routing Configuration." A version of that name becomes the Developer Name automatically.
3. Set your routing priority.
If SOS calls are the most important or the only work items your agents handle, set your routing priority to *1*. That priority ensures that SOS calls are routed to your agents before other types of work items.
4. Select your routing model.
5. Set the value of the **Percentage of Capacity** field to *100*.
Agents can accept only one SOS call at a time, so SOS calls take 100% of an agent's capacity.
6. Click **Save**.

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USER PERMISSIONS

To set up SOS:

- "Customize Application"

Create an SOS Queue

Queues are a classic element of Salesforce that help your teams manage leads, cases, service contracts, and custom objects. Omni-Channel supercharges queues to route work items to agents in real time. Create an SOS queue to funnel SOS calls to SOS agents. We'll associate the SOS queue with the SOS routing configuration we created earlier.

The work items in the SOS queue are assigned the priority that you specified in the SOS routing configuration that you created earlier.

For routing to work correctly, assign each of your agents to a queue from which they'll be receiving work items.

For more information about queues, see "Queues Overview" in the Salesforce Help.

1. From Setup, enter *Queues* in the *Quick Find* box, then select **Queues**.
2. Click **New**.
3. In the *Label* field, name your queue.
Let's call our queue "SOS Queue." A version of this name becomes the *Queue Name* automatically.
4. In the *Routing Configuration* field, look up and select the routing configuration that you created earlier, "SOS Routing Configuration."
5. In the *Supported Objects* section, add *SOS Session* to the list of selected objects.
6. In the *Queue Members* section, add each of the agents to whom you want to route SOS calls to the *Selected Users* field.
7. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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USER PERMISSIONS

To set up SOS:

- "Customize Application"

Update Your Salesforce Console Settings

After you get SOS all set up for your organization, it's time to a few settings in your Salesforce console so that your agents can start receiving work.

You need to add the Omni-Channel and SOS widgets to your console, as well as whitelist the URL *salesforceliveagent.com*.

The SOS and Omni-Channel widgets appear in the footer of the Salesforce console. From the Omni-Channel widget, agents can change their presence status and triage their incoming work assignments, including SOS calls. When an agent accepts an SOS call, the call opens in the SOS widget, where agents can view the customer's screen.

You also need to whitelist the URL *salesforceliveagent.com* to make sure your calls aren't blocked by your company's firewalls. This ensures that all of your customers' SOS calls make it safely to your agents.

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 and SOS widgets to.
3. In the *Choose Console Components* section, add Omni-Channel and SOS to your list of selected items.
4. In the *Whitelist Domain* field, add *salesforceliveagent.com* to the list of whitelisted domains.

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS

To customize a console app:

- "Customize Application"

5. Click **Save**.

Create an SOS Deployment

Create an SOS deployment to integrate your SOS settings from Salesforce into your mobile application.

When you create an SOS deployment, your deployment is assigned a unique ID number. Your mobile developers use this deployment ID to integrate your SOS settings in Salesforce into SOS in your mobile application.

1. From Setup, enter *SOS Deployments* in the **Quick Find** box, then select **SOS Deployments**.
2. Click **New**.
3. Choose the settings for your deployment.
4. Click **Save**.
5. Copy the SOS Deployment ID from the detail page and send it to your mobile developers.
To integrate the SOS deployment with a mobile application, mobile developers use the *SOS iOS SDK*.

IN THIS SECTION:

[SOS Deployment Settings](#)

SOS deployment settings control how your Salesforce SOS settings integrate into your mobile application.

SOS Deployment Settings

SOS deployment settings control how your Salesforce SOS settings integrate into your mobile application.

Apply settings when you create or edit an SOS deployment.

Setting	What It Does
SOS Deployment Name	Names the deployment. This deployment name, or a version of it, automatically becomes the API Name .
API Name	Sets the API name for the Live Agent deployment.
Activate Deployment	Activates the deployment so customers can request SOS calls when SOS is deployed in your mobile application.
Voice-Only Mode	Disables video functionality and allows agents and customers to communicate with audio only.

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in:
Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To create SOS deployments:

- “Customize Application”

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in:
Enterprise, Performance, Unlimited, and Developer Editions

Setting	What It Does
Enable Backward-Facing Camera	Allows the customer to relay video from the customer's backward-facing mobile camera to agents.
Queue	Determines the queue that you want to route incoming SOS calls to.
Session Recording Enabled	Automatically records SOS sessions.
Session Recording Storage Provider	Determines the data storage provider that stores your SOS session recordings. Available only if session recording is enabled.
Session Recording Storage Provider API Key	The ID of the access key that's associated with your Amazon S3 storage account. Available only if session recording is enabled.
Session Recording Storage Provider API Secret	The ID of the access secret that's associated with your Amazon S3 storage account. Available only if session recording is enabled.
Session Recording Storage Provider Bucket	The name of the Amazon S3 bucket where you want to store your SOS session recordings. Available only if session recording is enabled.

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