Omni-Channel for Administrators

Salesforce, Spring ’23

@salesforcedocs

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SET UP OMNI-CHANNEL

Set up Omni-Channel to 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: both Salesforce Classic (not available in all orgs) and 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 modify permission sets and profiles:
- Manage Profiles and Permission Sets

1. Guided Setup Flow for Routing Cases with Omni-Channel

   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.

2. Enable Omni-Channel

   Enable Omni-Channel to let agents manage their work in different service channels from the same console. Then enable Omni-Channel features based on your business needs.

3. 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.

4. Add the Omni-Channel Utility to the Service Console

   To give agents easy access to Omni-Channel, add it where they work—in the Service Console.

5. Set Up Omni Supervisor

   Use Omni Supervisor to monitor agent workloads and the status of work items that are routed by Omni-Channel. Agents can raise flags on work items when they require assistance from a supervisor. Supervisors can monitor Service Cloud Voice transcripts and chat messages between agents and customers, and send helpful messages that only the support agent sees. Supervisors can also respond to incoming support requests by changing queues as needed and can update agent skills quickly.

6. Set Up Agents

   In Omni-Channel, set up agents to complete work requests. After agents are set up, they can manage their work from the Omni-Channel widget in the Lightning console. Supervisors can view agents in Omni Supervisor.

7. Set Up Queues

   Prioritize, distribute, and assign records to teams who share workloads. Access queues from list views. Queue members can jump in to take ownership of any record in a queue. They're available for cases, contact requests, leads, orders, custom objects, service contracts, and knowledge article versions.

8. Access Omni-Channel Setup Home

   Set up Omni-Channel to route incoming work items from different service channels to qualified, available agents in your contact center. To learn more about what Omni-Channel components to set up and get a list of setup tasks, go to the new Omni-Channel setup home. The setup home also provides warnings when items aren't correctly configured. You can also view details about and click a link to access every service channel instance defined for your company.

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

Guided Setup Flow for Routing Cases with Omni-Channel

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.

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

EDITIONS

Service Setup is available in Lightning Experience

Available in: All editions with the Service Cloud

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-Case, On Break, and Busy. The Available-Case status makes the agent available only to accept cases.

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

To provide agents access to the presence statuses that we create, we make a permission set that assigns those presence statuses to users selected in the setup flow. The permission set is called Omni Setup Flow (with the 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:

Optimize Setup with the Service Setup Assistant

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 for Lightning Experience module on Trailhead.

SEE ALSO:

Trailhead: Omni-Channel for Lightning Experience

Test Your Omni-Channel Implementation

Give Users Access to Presence Statuses with Profiles

Enable Omni-Channel

Enable Omni-Channel to let agents manage their work in different service channels from the same console. Then enable Omni-Channel features based on your business needs.

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To set up Omni-Channel:
- Customize Application

Note: Digital Engagement for Sales Cloud is available for an extra cost in Enterprise and Unlimited Editions.

1. From Setup, enter *Omni-Channel Settings* in the Quick Find box, then select **Omni-Channel Settings**.
2. Enable Omni-Channel and its features.

Setting	Description
Enable Omni-Channel	Route incoming work items from different service channels to the most qualified, available support agents in your contact center. Allow supervisors to monitor the contact center, agent workloads, and the statuses of work items from one place–Omni Supervisor.
Enable Skills-Based and Direct-to-Agent Routing	Route work to a specific agent or an agent with specific skills. See Enable Skills-Based Routing or Route Work Items Directly to a Specific Agent.
Enable Secondary Routing Priority	Move a work item forward in a queue over older items and resolve conflicts across queues for items with the same routing configuration priority. In a queue, priority is determined by how long the work item has been waiting—first in, first out. However, while a work item is pending in the queue, new work could come in that is more urgent. See Set Up Secondary Routing Priority.
Enable Status-Based Capacity Model	Measure agent capacity based on the status of accepted work rather than the open tabs and sessions. If agents are unavailable, their work remains assigned, and reflected in their capacity, until

Setting	Description
	the work is completed or reassigned. See Set Up Status-Based Capacity Model.
Display a login confirmation upon loading a console with Omni-Channel	Display a prompt that asks the agent to choose which Omni-Channel instance to log in to if they try to log into multiple instances. To prevent agents from accidentally having two active customer sessions, like 2 simultaneous phone calls, each agent can log in to only one instance of Omni-Channel. For example, if an agent is logged in to Omni-Channel on one browser tab, they can't log in to a second Omni-Channel instance on another tab. If an agent is logged in to Omni-Channel and opens a second browser tab with Omni-Channel, they're logged out of one of the two instances. By default, they're logged out of the previous instance and logged in to the new instance. To enable the agent to choose which instance to log in to, use this option to display a prompt.

3. Click **Save**.

Note: To use Omni-Channel to route communications to the right sales team, you must also Enable Messaging.

SEE ALSO:

Salesforce Help: Digital Engagement for Sales Cloud

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: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To set up Omni-Channel:
- Customize Application

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 the Quick Find box, enter `Service Channels`, and then select **Service Channels**. Click **New**.
2. Specify the settings for your service channel.
3. Click **Save**.

Set Up Secondary Routing Priority

Let your agents tackle the right cases first with secondary routing priority.

Available in: Lightning Experience

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

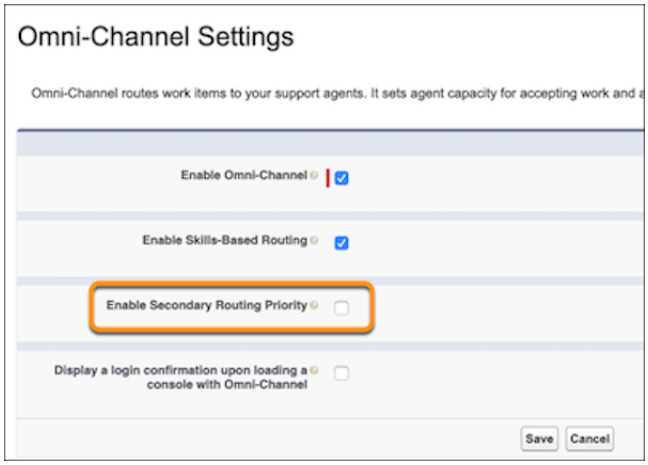
USER PERMISSIONS

To set up Omni-Channel:
- Customize Application

In a queue, priority is determined by how long the work item has been waiting—first in, first out. However, while a work item is pending in the queue, new work could come in that is more urgent. For example, transferred work, an item that has been waiting on someone's response, or work that is about to reach a service agreement deadline. You can shift an item to a different queue, but within that queue, it's behind older items. Also, some queues might have the same priority. Secondary Routing Priority solves this problem by moving a work item forward in a queue over older items and resolving conflicts across queues for items with the same routing configuration priority.

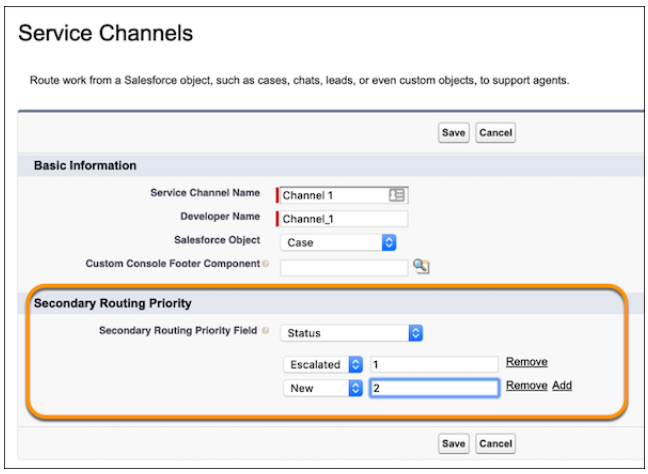
Note: When you enable secondary routing, existing work isn't reevaluated. Secondary routing applies to new work opened after this feature is enabled. Also, secondary routing priority doesn't support voice calls.

1. From Setup, enter *Omni-Channel* in the Quick Find box, then select **Omni-Channel Settings**.
2. Select **Enable Secondary Routing Priority**.



You can now configure secondary routing priority mappings for each channel.

3. From Setup, enter *Service Channels* in the Quick Find box, then select **Service Channels**.
4. Edit an existing service channel or add a new one.
5. In the Secondary Routing Priority section, select a priority field. Then map field values to priorities.



Example: To prioritize escalated cases first and new cases next, select **Status** as the priority field. Then set the Escalated field value to priority 1, and the New field value to priority 2. The highest priority is 0.

Note: Secondary Routing Priority is not automatically updated for skills-based routed chat and messaging channels. To update the SecondaryRoutingPriority field on the PendingServiceRouting object, use the API.

Understand Capacity Models

Omni-Channel determines agent capacity in one of two ways: Tab-Based or Status-Based.

Tab-Based Capacity Model

Determines agent capacity using the number of console tabs that are open in the agent's Omni-Channel session. When the agent logs out, all the work that's assigned to the agent is considered closed by Omni-Channel, and the agent's capacity is reset. Omni-Channel also considers the work to be closed when an agent closes the tab that Omni-Channel opened for the work item.

Note: With the Tab-Based Capacity Model, an agent can own up to 100 tabs at one time.

Status-Based Capacity Model

Determines agent capacity using the status of work items assigned the agent. For nonreal-time channels like cases, agents sometimes work on the same work item over multiple days, across multiple Omni-Channel sessions. The status-based capacity model checks the status of a work item to determine if the work consumes an agent's capacity. If the agent closes a tab or logs out of Omni-Channel, their capacity is not reset until the work has a completed status. The status-based capacity model can be used only for cases, leads, and custom objects. It isn't supported for real-time work items such as chat, voice, messaging, and SOS.

Set Up Status-Based Capacity Model

Measure agent capacity more accurately. Omni-Channel can determine agent capacity based on the status of accepted work rather than the open tabs and sessions. If agents are unavailable, their work remains assigned, and reflected in their capacity, until the work is completed or reassigned.

Set Up Status-Based Capacity Model

Measure agent capacity more accurately. Omni-Channel can determine agent capacity based on the status of accepted work rather than the open tabs and sessions. If agents are unavailable, their work remains assigned, and reflected in their capacity, until the work is completed or reassigned.

Available in: Lightning Experience

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

USER PERMISSIONS

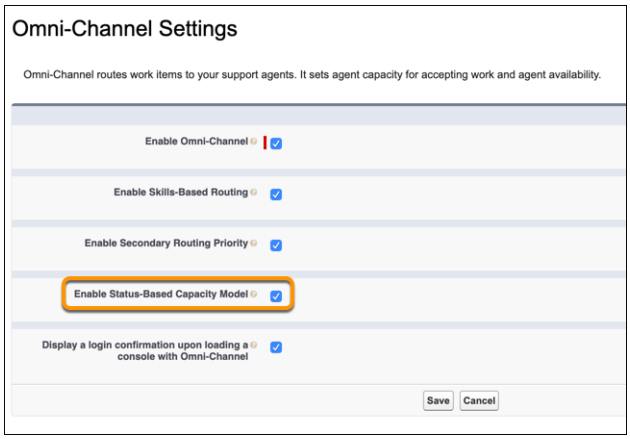
To set up Omni-Channel:

- Customize Application

With the status-based capacity model, work remains assigned and applied to an agent's capacity until the work is completed or reassigned to a different agent. In contrast, the tab-based capacity model releases an agent's capacity when a work tab is closed in the service console.

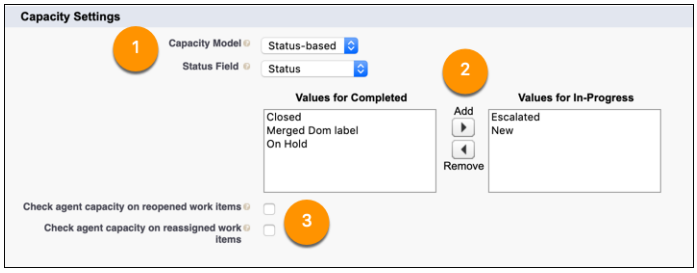
Note: The status-based capacity model can be used only for cases, leads, and custom objects. It isn't supported for real-time work items such as chat, voice, messaging, and SOS.

1. From Setup, enter *Omni-Channel* in the Quick Find box, then select **Omni-Channel Settings**.
2. Select **Enable Status-Based Capacity Model**.



You can now set up the status-based capacity model for each channel.

3. From Setup, enter `Service Channels` in the Quick Find box, then select **Service Channels**.
4. Edit an existing service channel or add a new one.
5. For each service channel, select the Status-Based capacity model. (1) Then, specify the picklist field that you use to track work status and the field values that you use for completed and in-progress work. (2) For work that's assigned to a specific agent, you can override the capacity check and keep the work assigned to the agent. (3)



Alternatively, select these options to check an agent's capacity before Omni-Channel reopens or reassigns work. If the agent doesn't have capacity, the work item is rerouted based on how it was most recently routed. For example, if the work item was routed using queue-based routing, Omni-Channel reroutes the work item to the queue that it was assigned to.

Note: If you set up a channel to use the status-based capacity model, work remains assigned even if agents close tabs. The My Work tab in the Omni-Channel widget shows work assigned to the agent until it is completed or reassigned. Agents can open a tab for work from the My Work tab.

A work item consumes agent capacity only if it was first assigned to the agent by Omni-Channel using queues or skills. Don't start working on a work item until Omni-Channel routes it to you.

Work items that were created before you enabled Status-Based Capacity Model don't apply toward agent capacity.

The Omni Supervisor console doesn't support all data points related to this model.

With the status-based capacity model, an agent can be assigned a total of 100 work items. The Omni-Channel widget displays the first 20 work items assigned. An additional 20 work items can remain open and assigned but don't impact agent capacity. To view additional work items, an agent must close other work items, go offline, and come back online.

Configure After Conversation Work Time

Give agents a set amount of time after a customer conversation to wrap up their work before they start a new conversation. Agents can use this After Conversation Work (ACW) time to send follow-up emails, update a case, or finalize their conversation notes. Supervisors can use Omni Supervisor and reports to track the amount of time agents spend on wrap-up work.

Omni-Channel is available in: Salesforce Classic and Lightning Experience
Service Cloud Voice is available in: Lightning Experience
Omni-Channel is available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
Service Cloud Voice is available in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To create a service channel:
- Customize Application

To create and save Lightning pages in the Lightning App Builder:
- Customize Application

To view Lightning pages in the Lightning App Builder:
- View Setup and Configuration

Important: After Conversation Work is available only for call and messaging channels and applies to all agents in the channel. After Conversation Work doesn't work with a status-based capacity model.

The ACW countdown begins the moment a call or message ends. Agents can exit the countdown early by closing the record or let it run its course. When the time runs out, the agent is considered available to help the next customer regardless of whether they've closed the record.

If ACW isn't enabled, agents reserve time for wrap-up tasks by leaving the call record open in the console. When an agent is ready to help the next customer, they must close the record tab to free up their capacity.

You can set up ACW in the presence configuration for a group of agents or in a service channel. ACW at the service channel level overrides the setting at the presence configuration level.

1. Configure ACW.
   a. From the Service Channels page in Setup, edit or create a channel based on Voice Call or Messaging. Alternatively, from the Presence Configurations page in Setup, edit or create a configuration.
   b. In the After Conversation Work Time section, select **Give agents wrap-up time after conversations**.
   c. In the Duration (seconds) field (required), enter the number of seconds that agents have to complete their closing work after a conversation. The value must be from 30 to 3,600 seconds.
   d. To let agents extend their ACW time, select **Let agent extend timer** and add the extension duration in seconds. Also, choose the maximum number of times agents can extend their ACW.
   e. Save your changes.
2. To let agents see the ACW countdown after a conversation ends, add the After Conversation Work component to your Voice Call or Messaging Session page layout.
   a. Open the Voice Call or Messaging Session record page in the Lightning App Builder.
   b. Drag the After Conversation Work component onto the page.
   c. Save your changes.

SEE ALSO:

How After Conversation Work Affects Agent Capacity

Wrap Up After a Call

Configure Omni-Channel for Service Cloud Voice

Service Channel Settings

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

Available in: both Salesforce Classic (not available in all orgs) and 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`.
`Developer 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.
`Minimize the Omni-Channel widget when work is accepted`	Automatically minimize the Omni-Channel widget when your agents accept work. (Lightning Experience only)
`Automatically accept work requests`	Automatically assign work from this service channel to the agent so that they're not required to manually accept the incoming work item. Note: You can enable this feature at the service channel level (for the entire channel) and presence configuration level (for a group of agents). Enabling this feature at the service-channel level provides you with finer control. For example, you can enable Auto Accept for phone calls, but not chats.
`Override agents' audio settings`	Select the sound that agents hear when work from this service channel is routed to them in Omni-Channel. You can play a different sound for each service channel or group of agents. For example, to differentiate the type of work, you can play a ringing sound for incoming calls and a ta-dah sound for incoming messages. Audio settings at the service-channel level override the settings for each agent's presence configuration.
`Notification Sound`	To play the default sound, select **Default**. To play a custom sound, select **Custom Sound**, and then select the audio file that's uploaded to Static Resources. Valid file types are aac, flac, mp3, ogg, opus, and wav. You can also set this option at the presence-configuration level. If you set it at both levels, the service channel setting overrides the presence configuration setting.
`Sound Length (Seconds)`	Select how long to play the notification sound. The maximum length is 30 seconds. The sound loops until the maximum length is reached.

Setting	What It Does
	You can also set this option at the presence-configuration level. If you set it at both levels, the service channel setting overrides the presence configuration setting. Note: If the customer ends the session before the agent joins the conversation, the agent still hears the notification sound for the specified length of time.
`Secondary Routing Priority Field`	Use field values to determine the routing priority of work items within and across queues when the queue routing configuration priority is the same. Select a priority field, then assign a priority for each field value. 0 is the highest priority. Note: This option appears when you enable secondary routing in the Omni-Channel settings under Setup. When you enable secondary routing, existing work isn't reevaluated. Secondary routing applies to new work opened after this feature is enabled. Also, secondary routing priority doesn't support voice calls.
`Capacity Model`	With the status-based capacity model, work remains assigned and applied to an agent's capacity until the work is completed or reassigned to a different agent. In contrast, the tab-based capacity model releases an agent's capacity when a work tab is closed in the service console. Note: This option appears when you enable the status-based capacity model in the Omni-Channel settings under Setup. The status-based capacity model can be used only for cases, leads, and custom objects. It isn't supported for real-time work items such as chat, voice, messaging, and SOS.
`Override After Conversation Work settings in presence configuration`	Overrides the After Conversation Work (ACW) settings in the presence configuration with the service channel settings.
`Duration (seconds)`	Indicates how many seconds agents have, from 30 to 3,600, to complete their closing work after a conversation. If `Give agents wrap-up time after conversations` is selected, this field is required.
`Let agent extend timer (seconds)`	Gives agents the option to pause the After Work Conversation timer to prevent being put back into available status before completing after conversation work.
`Extension duration (seconds)`	Indicates how many seconds agents have, from 15 to 3,600, to extend their closing work after a conversation. If `Let agent extend timer (seconds)` is selected, this field is required.

Setting	What It Does
`Max Extensions`	Indicates how many times, from 1 to 10, agents can pause the After Work Conversation timer. If `Let agent extend timer (seconds)` is selected, this field is required.

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: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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

- Cases
- Chats
- Claims
- Claim coverages
- Claim recoveries
- Contact requests
- Incidents
- Leads
- Messaging (Lightning Experience only)
- Orders
- Payment requests
- Social posts
- SOS video calls (Salesforce Classic only)
- Swarm members
- Custom objects that don't have a master object

Add the Omni-Channel Utility to the Service Console

To give agents easy access to Omni-Channel, add it where they work—in the Service Console.

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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.

Add the Omni-Channel Widget to the Classic Console
After you get Omni-Channel all set up for your organization, it's time to add the Omni-Channel widget to the Salesforce classic 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.

Available in: both Salesforce Classic (not available in all orgs) and 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 *App* in the Quick Find box, then select **App Manager**.
2. Click the dropdown next to the console app that you 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**.

Add the Omni-Channel Widget to the Classic Console

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

Available in: both Salesforce Classic (not available in all orgs) and 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 widget appears in the bottom right corner of the classic console. From there, agents can change their presence status and triage their incoming work assignments.

Note: If your organization uses Chat, you can either use the Chat widget or the Omni-Channel widget to manage chats, but not both. To learn more about managing Chat, see Migrate from Legacy Live Agent to Omni-Channel for Chat.

1. From Setup, enter *Apps* in the Quick Find box, then select **Apps**.
2. Click **Edit** next to the classic 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.

SEE ALSO:

Service Channel Settings

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: both Salesforce Classic (not available in all orgs) and 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**.

Set Up Omni Supervisor

Use Omni Supervisor to monitor agent workloads and the status of work items that are routed by Omni-Channel. Agents can raise flags on work items when they require assistance from a supervisor. Supervisors can monitor Service Cloud Voice transcripts and chat messages between agents and customers, and send helpful messages that only the support agent sees. Supervisors can also respond to incoming support requests by changing queues as needed and can update agent skills quickly.

See real-time information about your Omni-Channel agents, queues, and work in the Omni Supervisor panel, including waiting times, open work, and more. Omni Supervisor updates continuously to reflect the most up-to-date data, so that you always know how your agents are doing.

Keep an eye on Omni-Channel activity with intuitive tab views that show you the big picture of how your agents are doing. Take advantage of filtering and sorting to help you find what you need. Sort by the flag raise column to see which agents need assistance that you can provide through whisper messages that the agent sees but not the customer.

EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience

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

Drill down in the tabs to see detailed information about what agents are working on and backlogged work items.

Omni Supervisor is supported for:

- Queue-based routing for Omni-Channel
- Skills-based routing for Omni-Channel
- External routing for Omni-Channel

Enable Omni Supervisor

Train and monitor agents with Omni Supervisor. View your agents' voice transcripts and chats as they help customers. Send private messages to agents as needed during chats. You can view chats that are routed by Omni-Channel in Omni Supervisor.

Enable Supervisors to Change Agent Queues and Skills

Let supervisors change agents' queues and skills to provide faster and better service to your customers.

Show the Default Actions on Omni Supervisor Tabs

To enable supervisors to take action from Omni Supervisor, set up the default actions. For example, enable the Change Queues and Change Skills action buttons on the Agents tab so supervisors can change the queues and skills assigned to agents right from where they work.

Setting Up Custom Actions on Omni Supervisor Tabs

Improve supervisor productivity and contact center efficiency by adding custom actions to Omni Supervisor. For example, add actions that let supervisors send emails or Slack messages to agents, reassign work in a queue, or assign an agent to a different shift. Supervisors invoke these actions on the selected agents, queues, or work items in an Omni Supervisor tab.

Change What Supervisors See in Omni Supervisor

A supervisor configuration determines which agents, queues, skills, and actions that a group of supervisors can see when they're using Omni Supervisor. It also determines if they can see the agent timeline. If needed, you can set up a separate supervisor configuration for each group of supervisors.

Show All Offline Agents in Omni Supervisor

Supervisors can monitor agents and their work in the Agents tab of Omni-Channel Supervisor. By default, supervisors can view all online agents and only offline agents whose service resources are shared with them. To view all offline agents, share the service resources of all agents with the supervisors.

Add Omni Supervisor to the Service Console

To give supervisors easy access to Omni Supervisor, add it where they work—in the Service Console.

Enable Omni Supervisor

Train and monitor agents with Omni Supervisor. View your agents' voice transcripts and chats as they help customers. Send private messages to agents as needed during chats. You can view chats that are routed by Omni-Channel in Omni Supervisor.

1. From Setup, enter `Supervisor` in the Quick Find box, and select **Supervisor Settings**.
2. Select the features that you want to enable.

Setting	Description
Conversation monitoring	Lets supervisors view Service Cloud Voice transcripts and chat messages between agents and customers.
Agent sneak peek	Lets supervisors see what agents are typing before they send a message.
Customer sneak peek	Lets supervisors see what customers are typing before they send message.
Whisper messaging	Lets supervisors send private messages to agents during a chat.

3. Click **Save**.

Note: To change the title of the component that displays the Service Cloud Voice transcript, modify the Compact Layout.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Omni-Channel
- "Customize Application"

Enable Supervisors to Change Agent Queues and Skills

Let supervisors change agents' queues and skills to provide faster and better service to your customers.

1. In Setup, add the Manage Queue Memberships permission to the permission set or profile for your supervisors.
2. From Setup, enter *Supervisor* in the Quick Find box, and select **Supervisor Settings**.
3. Select **Queues and skills**.
4. Click **Save**.

Your supervisors can then change agents' queues and skills as needed on the Agent tab in Omni Supervisor. If the Change Queues and Change Skills buttons still aren't visible, check if those actions were added to the supervisor configuration.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Omni-Channel:
- Customize Application

To create or change queues:
- Manage Queue Memberships

  OR

  Customize Application

  AND

  Manage Public List Views

To change queues created by other users:
- Manage Queue Memberships

  OR

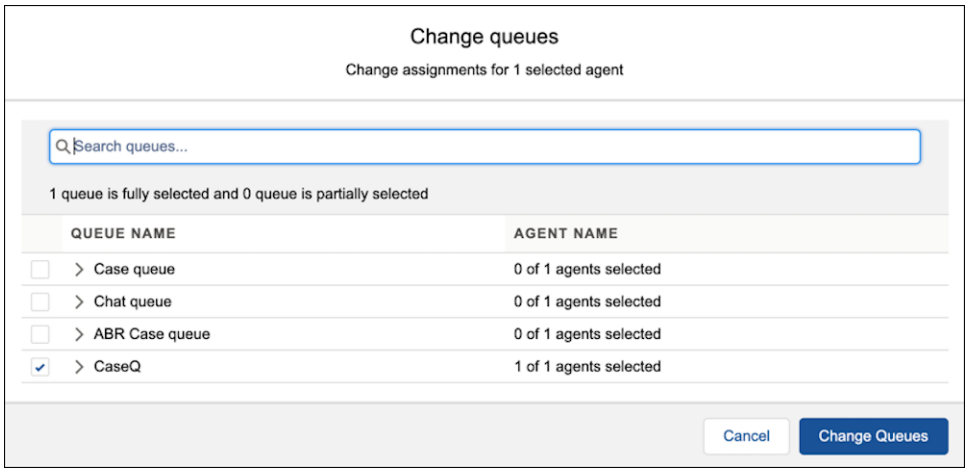
  Customize Application

  AND

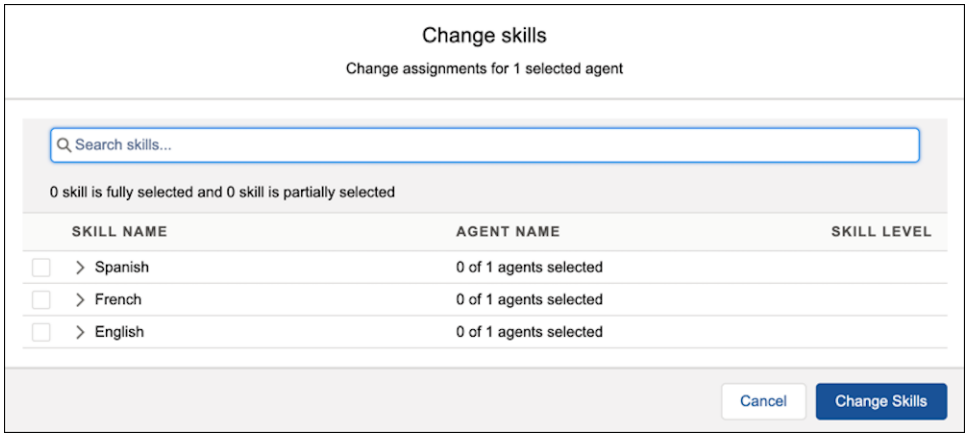
  Manage Public List Views and Manage Users

To change skills:
- Create, read, update on service resources
- Read access and Edit access for the Active field on Service Resource field-level security
- Read access and Edit access for the following fields on Service Resource Skill field-level security: End Date, Start Date, and Skill Level

To change queues, your supervisors click **Change Queues**.



To change skills, they click **Change Skills**.



SEE ALSO:

Change What Supervisors See in Omni Supervisor

Show the Default Actions on Omni Supervisor Tabs

To enable supervisors to take action from Omni Supervisor, set up the default actions. For example, enable the Change Queues and Change Skills action buttons on the Agents tab so supervisors can change the queues and skills assigned to agents right from where they work.

To show the default actions in Omni Supervisor tabs, verify that your org meets these requirements.

Action	Requirements
Change Queues	• Grant supervisors the Manage Queue Memberships user permission, or add it to the supervisor profile. • Enable Queues and skills in the supervisor settings under Setup. See Enable Supervisors to Change Agent Queues and Skills.
Change Skills	Enable Queues and skills in the supervisor settings under Setup. See Enable Supervisors to Change Agent Queues and Skills.
Assign Learning	Your org requires a Workforce Engagement Management license.
AWS Dashboard	Your org requires a license for either Service Cloud Voice with Amazon Connect or Service Cloud Voice with Partner Telephony from Amazon Connect.

EDITIONS

Available in: **Lightning Experience**

Omni Supervisor is available in: **Essentials**, **Professional**, **Enterprise**, **Unlimited**, and **Developer Editions**

Tip: In a supervisor configuration, you can override the default settings for a group of supervisors. You can choose which actions appear on each tab and add custom actions to Omni Supervisor tabs as well.

SEE ALSO:

Setting Up Custom Actions on Omni Supervisor Tabs

Setting Up Custom Actions on Omni Supervisor Tabs

Improve supervisor productivity and contact center efficiency by adding custom actions to Omni Supervisor. For example, add actions that let supervisors send emails or Slack messages to agents, reassign work in a queue, or assign an agent to a different shift. Supervisors invoke these actions on the selected agents, queues, or work items in an Omni Supervisor tab.

To implement a custom action, define the action in a screen flow, and then add the custom action to the Omni Supervisor tabs.

To invoke an action, a supervisor selects agents, queues, or work items on an Omni Supervisor tab, and then clicks the action button. The associated screen flow runs and performs the action on the IDs of the selections on the Omni Supervisor tab.

Omni Supervisor Tab	IDs Passed
Agents	Agent IDs from User object
Agent Details	IDs of routed objects, such as voice calls, messaging sessions, or cases

EDITIONS

Available in: **Lightning Experience**

Omni Supervisor is available in: **Essentials**, **Professional**, **Enterprise**, **Unlimited**, and **Developer Editions**

Omni Supervisor Tab	IDs Passed
Queues Backlog	Queue IDs from Group object (of type Queue)
Queue Details	IDs of routed objects, such as calls, messaging sessions, or cases
Assigned Work	Queue IDs from Group object (of type Queue)
Assigned Work Details	IDs of routed objects, such as calls, messaging sessions, or cases
Skills Backlog	IDs of routed objects, such as calls, messaging sessions, or cases
Skill Details	IDs of routed objects, such as calls, messaging sessions, or cases

Create the Screen Flow for the Omni Supervisor Custom Action

To define the action behavior and design the screen that appears when a supervisor clicks the action button, create a screen flow in Flow Builder. For example, you can create a screen that lets a supervisor send an email to agents.

Add the Custom Action to Omni Supervisor Tabs

Edit the supervisor configuration to specify which tabs show the custom action. All supervisors assigned to the supervisor configuration can see the action.

SEE ALSO:

Show the Default Actions on Omni Supervisor Tabs

Create the Screen Flow for the Omni Supervisor Custom Action

To define the action behavior and design the screen that appears when a supervisor clicks the action button, create a screen flow in Flow Builder. For example, you can create a screen that lets a supervisor send an email to agents.

1. From Setup, in the Quick Find box, enter `Flows`, and select **Flows**.
2. Click **New Flow**.
3. Click **Screen Flow** > **Create**.
4. To accept the selected agents, queues, or work items as input to the screen flow, add a Variable resource. For the variable, set the API name to `ids`, set the data type to `Text`, select the "Allow multiple values (collection)" option, and select the "Available for Input" option.

   This variable stores the agents, queues, or work items that a supervisor selects in Omni Supervisor to perform the action on.

EDITIONS

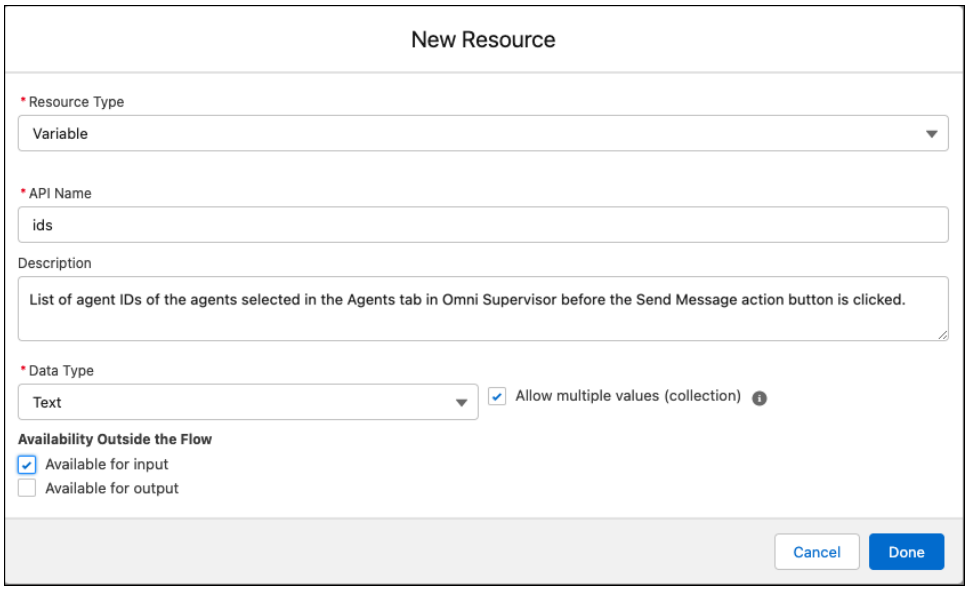
Available in: **Lightning Experience**

Omni Supervisor is available in: **Essentials**, **Professional**, **Enterprise**, **Unlimited**, and **Developer Editions**

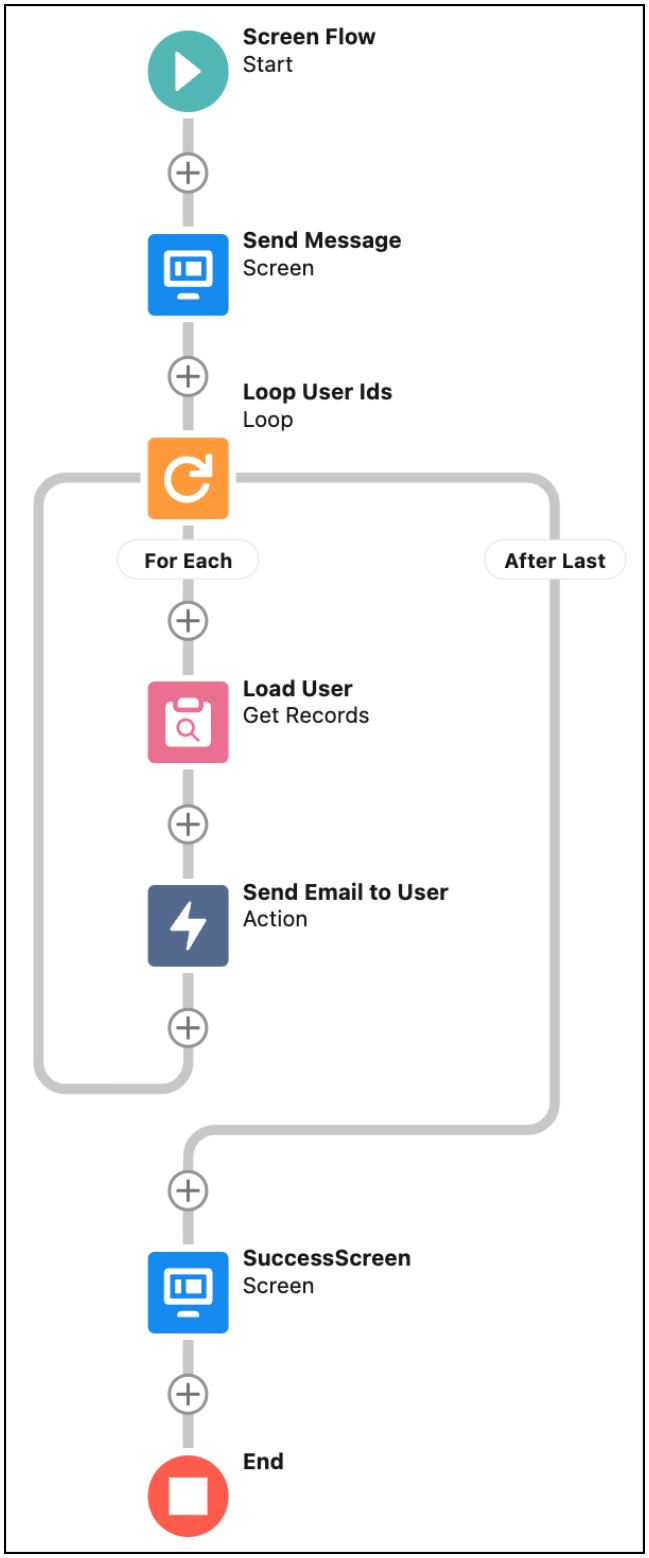
USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow



5. To build the page that appears when the supervisor clicks the action button in Omni Supervisor, add a Screen element.
6. Define the action behavior using flow elements. For example, to iterate over the multiple input IDs that are passed from the variable, add a Loop element.



7. Save and name the screen flow.

   The screen flow label appears as the action button name in Omni Supervisor. For example, enter “Send Email” as the screen flow label.

8. To make the screen flow available for use in an action, click **Activate**.

SEE ALSO:

Trailhead: Add Screens to Your Flow

Salesforce Help: Flow Builder

Add the Custom Action to Omni Supervisor Tabs

Edit the supervisor configuration to specify which tabs show the custom action. All supervisors assigned to the supervisor configuration can see the action.

1. From Setup, in the Quick Find box, enter `Supervisor Configurations`, and select **Supervisor Configurations**.
2. Select an existing supervisor configuration, or create one.
3. In the Define Actions section of the supervisor configuration, select the tab, and then move the custom action to the Selected Actions box.
   The custom action button name is the same as its underlying screen flow name. You can add up to 10 actions on each tab.

EDITIONS

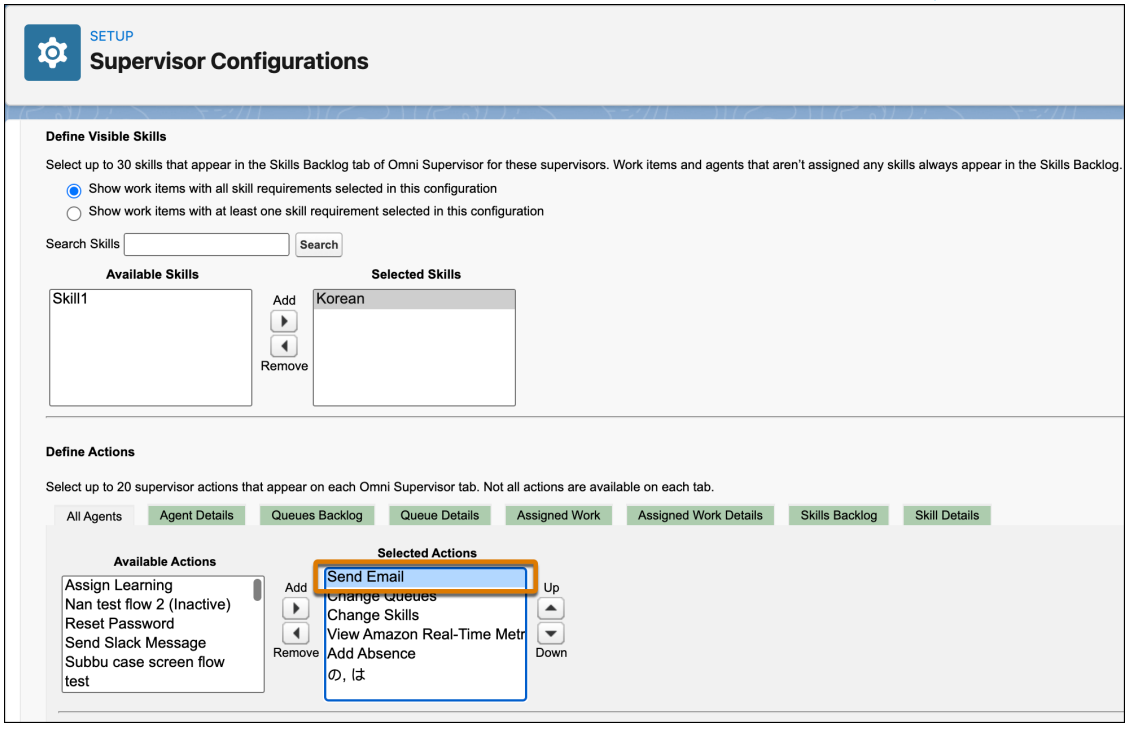
Available in: **Lightning Experience**

Omni Supervisor is available in: **Essentials**, **Professional**, **Enterprise**, **Unlimited**, and **Developer Editions**

USER PERMISSIONS

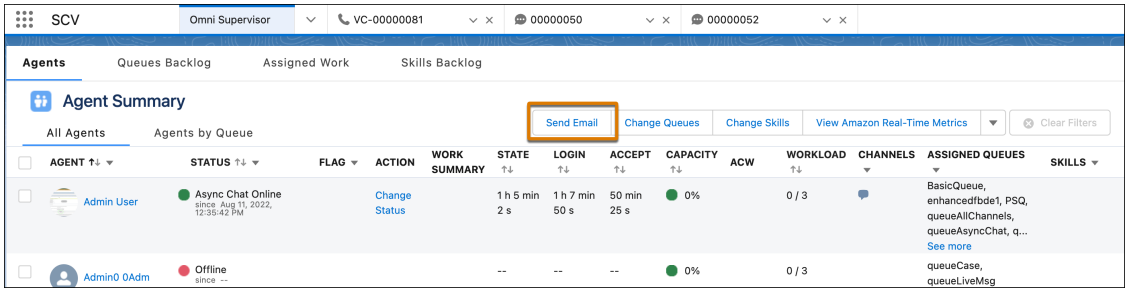
To set up custom actions in Omni Supervisor:

- Contact Center Admin



4. Save the supervisor configuration.

Like system actions, custom actions appear as buttons on the Omni Supervisor tab. System actions are actions provided by default. Custom actions are actions that you can add to Omni Supervisor tabs.



Change What Supervisors See in Omni Supervisor

A supervisor configuration determines which agents, queues, skills, and actions that a group of supervisors can see when they're using Omni Supervisor. It also determines if they can see the agent timeline. If needed, you can set up a separate supervisor configuration for each group of supervisors.

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To set up Omni-Channel:

- "Customize Application"

You can't add users to supervisor configurations via roles or "Grant Access Using Hierarchies." Supervisor configurations only support users who are directly assigned to a public group.

1. From Setup, enter *Supervisor Configurations* in the Quick Find box, then select **Supervisor Configurations**.
2. Click **New**.
3. Enter a name for your configuration. The Developer Name populates automatically.
4. To assign supervisors to the configuration, select users or their profiles in the Which Supervisors Are Impacted? section. A user configuration overrides a user profile configuration.

   Note: This configuration doesn't change the supervisors' access to agents, queues, or skills. It filters what they see on the Omni Supervisor tabs only.

5. To filter the agents that these supervisors can see in the Agents tab, add at least one public group in the Select Visible Agents section. The members of the public group are the agents that the supervisors can see in Omni Supervisor.

   A maximum of 2,000 public groups can be shown in the search results.

6. To filter queues from the Queues Backlog and Assigned Work tabs, select at least one queue in the Select Visible Queues section.

   For example, to provide better support for cases from top accounts, filter the Queues Backlog tab to show only those accounts.

7. To filter skills from the Skills Backlog tab, select the skills in the Define Visible Skills section. You also have to specify whether to show work items with at least one specified skill or all specified skills.
8. To show an action in an Omni Supervisor tab, in the Define Actions section, select the tab, and then move the action to the Selected Actions column.

The Define Actions section shows system and custom actions. You can add up to 10 actions on each tab. Use the Up and Down arrows to reorder the selected actions.

Note: If you add a custom action in the supervisor configuration, to see the action in Omni Supervisor, a supervisor either needs the "Run Flows" user permission, the Flow User field enabled on their user detail page, or access to the flow if **Override default behavior and restrict access to enabled profiles or permission sets** is selected for the flow.

9. To give your agents more privacy, select **Hide the agent timeline from these supervisors**.
10. Click **Save**.

SEE ALSO:

Show the Default Actions on Omni Supervisor Tabs

Setting Up Custom Actions on Omni Supervisor Tabs

Show All Offline Agents in Omni Supervisor

Supervisors can monitor agents and their work in the Agents tab of Omni-Channel Supervisor. By default, supervisors can view all online agents and only offline agents whose service resources are shared with them. To view all offline agents, share the service resources of all agents with the supervisors.

Available in: Lightning Experience

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

USER PERMISSIONS

To change the org-wide defaults for the Service Resource object:

- Customize Application

Tip: This topic describes how to give users access to view all offline agents. To permit particular supervisors to view offline agents, set the access at the user profile level. Open the profile, scroll down to the Standard Object Permissions section, and enable the **View All** property for the Service Resources object.

1. In Setup, enter `Sharing` in the Quick Find box, then select **Sharing Settings**.
2. Under Organization-Wide Defaults, click **Edit**.
3. In the Default Internal Access column for the Service Resources object, change **Private** to **Public Read Only** or **Public Read/Write**. Public Read Only is the minimum required.
4. Click **Save**.

This change shows all offline agents to supervisors with the profile. To reduce the set of agents displayed to the agents that they oversee, create a supervisor configuration.

SEE ALSO:

Create Service Resources for Agents

Add Omni Supervisor to the Service Console

To give supervisors easy access to Omni Supervisor, add it where they work—in the Service Console.

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Add Omni Supervisor to a Lightning Console App

Add Omni Supervisor to the console in Lightning Experience to get your supervisors up and running.

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To set up Omni-Channel and manage apps.
- Customize Application

Before adding Omni-Channel to the Lightning Service Console:

- Make sure you have Omni-Channel enabled and ready-to-go in Lightning Experience, with agents and queues running.
- Make sure you have a working Lightning console app for service.

1. In Setup, enter *Apps* in the Quick Find box, then select **App Manager**.
2. Click the dropdown next to the Lightning console app you want to add Omni Supervisor to, then click **Edit**. We recommend creating a profile for your supervisors so you can customize a console just for them.
3. Under Select Items, add `Omni Supervisor` to the Selected Items list.
4. Under Assign to User Profiles, select the profiles you want to assign to this Supervisor-enabled console. The users in the selected profiles must have tab visibility in order to view Omni Supervisor in their console.
5. Click **Save**.
6. Click **Done**.

Verify that Omni-Channel is in the console by opening the console and viewing the tab selections. You should see the option **Omni Supervisor**.

Add Omni Supervisor to the Classic Console

Add Omni Supervisor to the Salesforce classic console to get your supervisors up and running.

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To set up Omni-Channel and manage apps.
- Customize Application

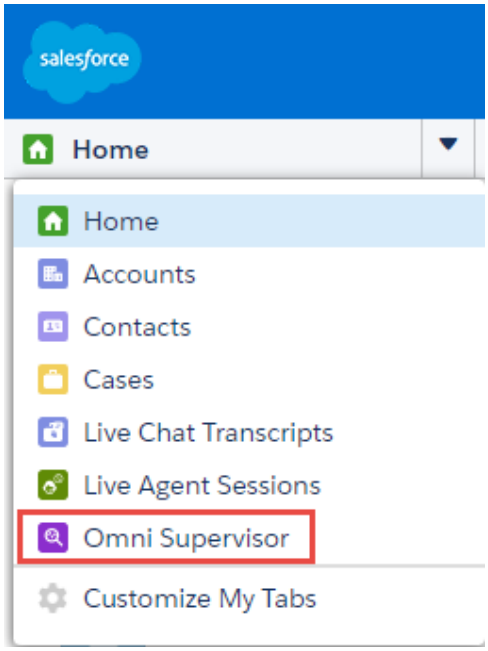
Before adding Omni Supervisor to the console:

- Make sure you have Omni-Channel enabled and ready-to-go with agents and queues running.

- Make sure you have a working console app.

1. In Setup, enter *Apps* in the Quick Find box, then select **Apps**.
2. Click **Edit** next to the classic console app that you want to add Omni Supervisor to. Or, create a new console app. We recommend creating a profile for your supervisors so you can customize a console just for them.
3. In the Choose Navigation Tab Items section, add `Omni Supervisor` to the Selected Items list.
4. Select the profiles you want to assign to this Supervisor-enabled console. The users in the selected profiles must have tab visibility in order to view Omni Supervisor in their console.
5. Click **Save**.

Verify that Omni Supervisor is in the console by opening the console and viewing the tab selections. You should see the option **Omni Supervisor**.



Set Up Agents

In Omni-Channel, set up agents to complete work requests. After agents are set up, they can manage their work from the Omni-Channel widget in the Lightning console. Supervisors can view agents in Omni Supervisor.

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Set Up Agent Statuses and Capacity

Create presence statuses to indicate whether agents are online and available for work, and then grant the agents access to the statuses. Create descriptive statuses for more accurate reporting. For instance, you can create statuses such as Unavailable - On a Break, Unavailable - Missed Call, and Available for Chats and Calls. Also, set up the presence configurations to set agent capacity and define the Omni-Channel behavior. Your organization can have multiple presence statuses and presence configurations for different groups of agents and 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.

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To set up 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, enter `Presence` in the Quick Find box, select **Presence Statuses**, then click **New**.
2. Choose the settings for your presence status.
3. Click **Save**.

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.

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: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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

After you've created your presence statuses for Omni-Channel, set up how your users will access them. You can set access through permission sets or profiles.

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Give Users Access to Presence Statuses with Permission Sets

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

Available in: both Salesforce Classic (not available in all orgs) and 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 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: both Salesforce Classic (not available in all orgs) and 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 modify profiles:
- 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 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**.

Create Presence Configurations

Presence configurations determine how much work agents can take on and the Omni-Channel behaviors while they assist customers. In each configuration, define how to handle work requests. Select whether agents can decline work items and the reasons they can do so. Also, select the Omni-Channel statuses that are assigned to agents if they miss or decline a work item. Your organization can have multiple configurations for different groups of agents who support different channels.

USER PERMISSIONS

To set up Omni-Channel:
- Customize Application

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Note: Implement this feature in one click with the Service Setup Assistant: Learn more

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 the Quick Find box, enter *Presence*, and then select **Presence Configurations**. Then click **New**.
2. Choose the settings for your presence configuration.
3. Click **Save**.
4. Refresh the page and log in to Omni-Channel.

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: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

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 work requests`	Automatically accepts work assignments that are pushed to an agent. These work items open automatically in the agent's workspace, so the agent isn't required to accept them 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.
`Allow agents to decline work 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. By default, the status is set to offline for declined voice calls. Service Cloud Voice uses this mechanism to force agents to reset their status when they're ready to receive calls again. Otherwise, they could continue to receive and miss calls indefinitely. This setting is available only if `Allow Agents to Decline Requests` is enabled. Note: When you update statuses on declined or missed calls, the agent's presence status changes, but their Amazon Connect status remains as Missed. We recommend that you set the presence status to Update to Busy or Offline to keep the agent's status in sync with Amazon Connect when they decline or miss a call.

Setting	What It Does
`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. By default, the status is set to offline for missed voice calls. Service Cloud Voice uses this mechanism to force agents to reset their status when they're ready to receive calls again. Otherwise, they could continue to receive and miss calls indefinitely. This setting is available only if `Push Time-Out` is enabled. Note: When you update statuses on declined or missed calls, the agent's presence status changes, but their Amazon Connect status remains as Missed. We recommend that you set the presence status to Update to Busy or Offline to keep the agent's status in sync with Amazon Connect when they decline or miss a call.
`Play a notification sound for work requests`	Plays a sound in the agent's widget when a work request is received.
`Notification Sound`	To play the default sound, select Default. To play a custom sound, select Custom Sound, and then select the audio file that's uploaded to Static Resources. Valid file types are aac, flac, mp3, ogg, opus, and wav. You can also set this option at the service-channel level, which overrides the setting here at the presence-configuration level.
`Sound Length (Seconds)`	Select how long to play the notification sound. The maximum length is 30 seconds. You can also set this option at the service-channel level, which overrides the setting here at the presence-configuration level. Note: If the customer ends the session before the agent joins the conversation, the agent still hears the notification sound for the specified length of time.
`Play a notification sound if Omni Channel loses connection`	Plays a sound in the agent's widget when the agent loses connection with Omni-Channel.
`Give agents wrap-up time after conversations`	Gives agents a set amount of time after a customer conversation to wrap up their work before they start a new conversation. Agents see the countdown in the After Conversation Work (ACW) component.

Setting	What It Does
`Duration (seconds)`	Indicates how many seconds agents have, from 30 to 3,600, to complete their closing work after a conversation. If `Give agents wrap-up time after conversations` is selected, this field is required.
`Let agent extend timer (seconds)`	Gives agents the option to pause the After Work Conversation timer to prevent being put back into available status before completing after conversation work.
`Extension duration (seconds)`	Indicates how many seconds agents have, from 15 to 3,600, to extend their closing work after a conversation. If `Let agent extend timer (seconds)` is selected, this field is required.
`Max Extensions`	Indicates how many times, from 1 to 10, agents can pause the After Work Conversation timer. If `Let agent extend timer (seconds)` is selected, this field is required.

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. 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 Service Resources for Agents

Service resources represent individual agents. Create a service resource for each agent. If an agent isn't assigned a service resource, they don't appear in Omni Supervisor when they're offline.

Available in: Lightning Experience

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

USER PERMISSIONS

To create service resources:

- "Create" on service resources

Note: If you don't see the Service Resource tab, check the tab visibility to see if it's turned off. 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**.

SEE ALSO:

Show All Offline Agents in Omni Supervisor

Set Up Queues

Prioritize, distribute, and assign records to teams who share workloads. Access queues from list views. Queue members can jump in to take ownership of any record in a queue. They're available for cases, contact requests, leads, orders, custom objects, service contracts, and knowledge article versions.

You can manually add a record to a queue by changing the record's owner to the queue. Or, an assignment rule can add cases or leads to a queue based on specific record criteria. Records remain in a queue until they're assigned an owner. Any queue members or users higher in a role hierarchy can take ownership of records in a queue.

Example:

- Create a task queue with members who are sales reps following up on pending opportunities.
- Create a lead queue with members who are sales reps assigned to a specific sales territory.
- Create a case queue with members who are support agents assigned to different service levels.
- Create a contact request queue with members who are support agents to resolve customer issues.
- Create a knowledge article version queue with members who are users that can translate new versions of articles into a specific language.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Contact Manager**, **Group**, **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Database.com** Editions

Lead queues and case queues are not available in **Database.com**

Contact requests and service contract queues are available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

Create Queues

Prioritize and assign records to teams that share workloads. There's no limit to the number of queues you can create, and you can choose when queue members receive email notifications.

Create Routing Configurations for Your Queues

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 Queues

Prioritize and assign records to teams that share workloads. There's no limit to the number of queues you can create, and you can choose when queue members receive email notifications.

Note: Implement this feature in one click with the Service Setup Assistant: Learn more

1. From Setup, enter *Queues* in the Quick Find box, then select **Queues**.
2. Click **New**.
3. Enter a label and queue name. The label is the name of the list view that users work from.
4. Choose whom to notify when new records are added to the queue.
5. If your org uses divisions, select the queue's default division. Cases inherit the division of the contact that they're related to. If a case doesn't have a contact, it's assigned to the default global division.
6. Add which objects to include in the queue.
7. Add queue members. Members can be individuals, roles, public groups, territories, connections, or partner users.

   Depending on your sharing settings, only queue members and users above them in the role hierarchy can take ownership of records in the queue.

   Note: Keep these considerations in mind when adding queue members:

   - To manage members of a queue that's mapped to a contact center for voice calls only, don't use the Queues page. Instead, use the Contact Center details page. For more information, see Manage Contact Center Queues in Salesforce and Your Contact Center.
   - If the **Grant Access Using Hierarchies** option is unchecked for a public group that you're adding to a queue, only queue members are added to the queue. If the option is checked, managers of those queue members are also added to the queue.
   - If you add a role and its subordinates to a queue, all users with that role and their subordinates are added as queue members. Anyone above that role is added as managers of the queue members.
   - Work can be routed to queue members only, not their managers.
   - Guest users can't be queue members.
   - After enabling digital experiences, all Roles and Subordinates members in queues are converted to Roles, Internal and Portal Subordinates members. Review queues that contain Roles, Internal and Portal Subordinates members, and replace them with Role and Internal Subordinates as required.

8. Save the queue.
9. If you want, set up assignment rules for your lead or case queues so that records that meet certain criteria are automatically added to a queue.

To view the queues that a user is a member of, from Setup, in the Quick Find box, enter *Users*, then select **Users** and select the user. In the user's Queue Membership related list, you can create a queue or click a queue name to view its details.

USER PERMISSIONS

To create or change queues:
- Customize Application

  AND

  Manage Public List Views

To change queues created by other users:
- Customize Application

  AND

  Manage Public List Views and Manage Users

Create Routing Configurations for Your Queues

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: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To set up Omni-Channel:
- Customize Application

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 you set up Omni-Channel.

Note: You can route different work items in the same org using queue-based routing, skills-based routing, or both.

If you enable skills-based routing rules on a routing configuration and assign the routing configuration to a queue, the queue's membership no longer applies to routing. Work is routed to available agents with the right skills. If no skills are assigned to a work item, the work is routed to any available agent in your org.

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.

   Tip: To route calls with an Omni-Channel flow, ensure that the routing model for the routing configuration is set to External Routing.
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.

SEE ALSO:

Advanced Routing with Omni-Channel Flows

Route to a Queue

Route to a Skill

Routing Configuration Settings

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

Available in: both Salesforce Classic (not available in all orgs) and 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 routing configuration.
`Overflow Assignee`	Sets the user or queue that Omni-Channel routes items to when your org reaches Omni-Channel limits. The overflow assignee must be a user or a queue without a routing configuration. Ensure that you: • Select a user or queue that has access to the objects that the queue(s) using this routing configuration handles • 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.

Setting	What It Does
`Push Time-Out (seconds)`	Sets a time limit for an agent to respond to an item before it's pushed to another agent.
`Drop Additional Skills Time-out (seconds)`	Set the time to elapse before additional skills are dropped from Omni-Channel routing.

Skills-Based Routing Rules

Setting	What It Does
`Use with Skills-Based Routing Rules`	Use this routing configuration with Skills-Based Routing Rules. Note: If you use the Omni-Channel Flow, you'll invoke routing rules from the flow instead.
`Skills`	Optionally, add default skills. Work is routed using a combination of rules and default skills.

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 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.As agents are assigned work items from the queue, the `Capacity Percentage` is deducted from the agent's overall capacity as long as they have enough to cover the assigned work items. 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: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

In Omni-Channel, work items are automatically routed or "pushed" to agents in the appropriate queue. When you set up a routing configuration, select a routing model option. This option determines how to distribute work items evenly to your agents.

The Least Active and Most Available options consider agents' used or available capacities, respectively. An agent's overall capacity—how much work the agent can handle at a time—is determined by the presence configuration that the agent is assigned to. You can specify overall capacity using relative work unit values or a percentage.

Routing Option	Description	Example
`Least Active`	Incoming work items are routed to the agent whose work is consuming the smallest amount of capacity. If a tie occurs, the work item is routed to the agent who hasn't received work in the longest time.	• Agent A has an overall capacity of 5 work units. Agent B has an overall capacity of 10 work units. • Agent A has 3 active work items, each with a capacity weight of 1. Agent B has 5 active work items with a capacity weight of 1. • Agent A's used capacity is 3 work units, while Agent B's used capacity is 5 work units. Because Agent A's work is consuming less capacity than Agent B's work, Omni-Channel routes the incoming work item to Agent A.
`Most Available`	Incoming work items are routed to the agent who has the greatest amount of available capacity. If a tie occurs, the work item is routed to the agent who hasn't received work in the longest time.	• Agent A has an overall capacity of 5 work units. Agent B has an overall capacity of 10 work units. • Agent A has 3 active work items with a capacity weight of 1. Agent B has 5 active work items with a capacity weight of 1. • Agent A's available capacity is 5−3=2 work units. Agent B's available capacity is 10−5=5 work units. Agent B has more available capacity than Agent A, so Omni-Channel routes the incoming work item 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: both Salesforce Classic (not available in all orgs) and 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 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.

   Note: Queue names can't contain commas.

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

Access Omni-Channel Setup Home

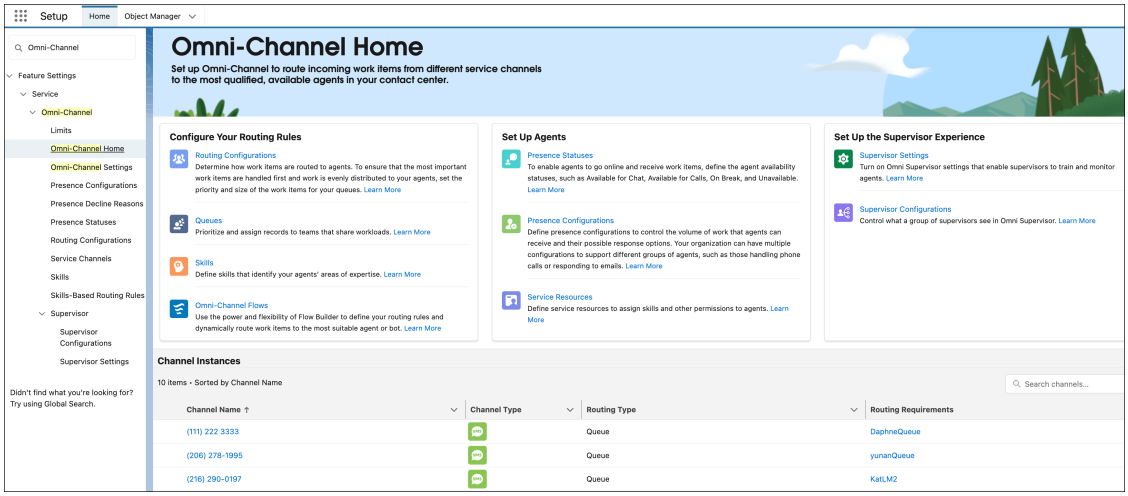
Set up Omni-Channel to route incoming work items from different service channels to qualified, available agents in your contact center. To learn more about what Omni-Channel components to set up and get a list of setup tasks, go to the new Omni-Channel setup home. The setup home also provides warnings when items aren't correctly configured. You can also view details about and click a link to access every service channel instance defined for your company.

1. In the Quick Find box under Setup, enter `Omni-Channel Home`, and then select **Omni-Channel Home**.

EDITIONS

Available in: **Salesforce Classic**, **Lightning Experience**

Omni Supervisor is available in: **Essentials**, **Professional**, **Enterprise**, **Unlimited**, and **Developer Editions**



2. To perform a setup task, click the link.
3. To learn more about a setup task, click **Learn More** for the task.
4. In the Channel Instances section, check out the service channel instances that were created for your company.
5. If a warning appears for a service channel instance, hover over the icon for more information.

   For example, a warning appears if the assigned Omni-Channel flow is inactive or the channel instance routes work to a queue with a missing routing configuration.

Migrate from Legacy Live Agent to Omni-Channel for Chat

Are you loving Chat 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: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Essentials**, **Unlimited**, and **Enterprise** Editions with Service Cloud or Sales Cloud

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

Chat is powered by Chat Configurations, which control the behaviors and settings that are available to Chat users. Similarly, Omni-Channel uses Presence Configurations to control the behaviors and settings that are available to Omni-Channel users. You can integrate Chat 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 Chat, your agents are then able to accept or reject chat requests right from the Omni-Channel widget.

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

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

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

If you have Chat enabled but don't have an implementation, when you enable Omni-Channel, Salesforce creates a Chat 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 Chat 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-Channel and set up Skills-Based Routing Rules or assign your agents to queues. Then, add the Omni-Channel utility and Live Chat Transcripts to your Lightning Console app, and your 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 Chat 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 Chat in Lightning Experience, you must use Omni-Channel routing.

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Essentials**, **Unlimited**, and **Enterprise** Editions with Service Cloud or Sales Cloud

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 Chat 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 Chat 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.
Supervisors use the Chat Supervisor Panel to observe chats and assist agents with their chats.	Chat supervisors can view agent activity in Omni Supervisor, but they use the Chat 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 Chat Supervisor Panel.
Reports and data for chats are separate from Omni-Channel data.	Chat data is included in Agent Work reports in addition to Chat reports.

Live Agent Routing (Salesforce Classic only)	Omni-Channel Routing
For a queue to appear as an option on the Chat button, the queue must include the Chat Sessions object in its support objects.	For a queue to appear as an option on the 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 Chat.	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.
- 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.

ROUTE WORK WITH OMNI-CHANNEL

Use Omni-Channel to route work items to queues, agents, skills, and even Einstein Bots (on supported channels). Depending on your business needs, you can use different ways to route work, including Omni-Channel flows.

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Omni-Channel routes work based on the defined routing logic. When an agent is assigned a work item, they can accept it to begin working on it or decline it. When a work item is declined, Omni-Channel releases the agent's capacity consumed by the work item. But the declined work item remains owned by the declining agent until the work is routed again. If the agent declines a work item or doesn't accept the work item in the specified time period, Omni-Channel doesn't try to route that work item to that agent again.

If an agent accepts the work, they can transfer the work to another agent.

Understand the Details of 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.

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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 to initiate the routing process.

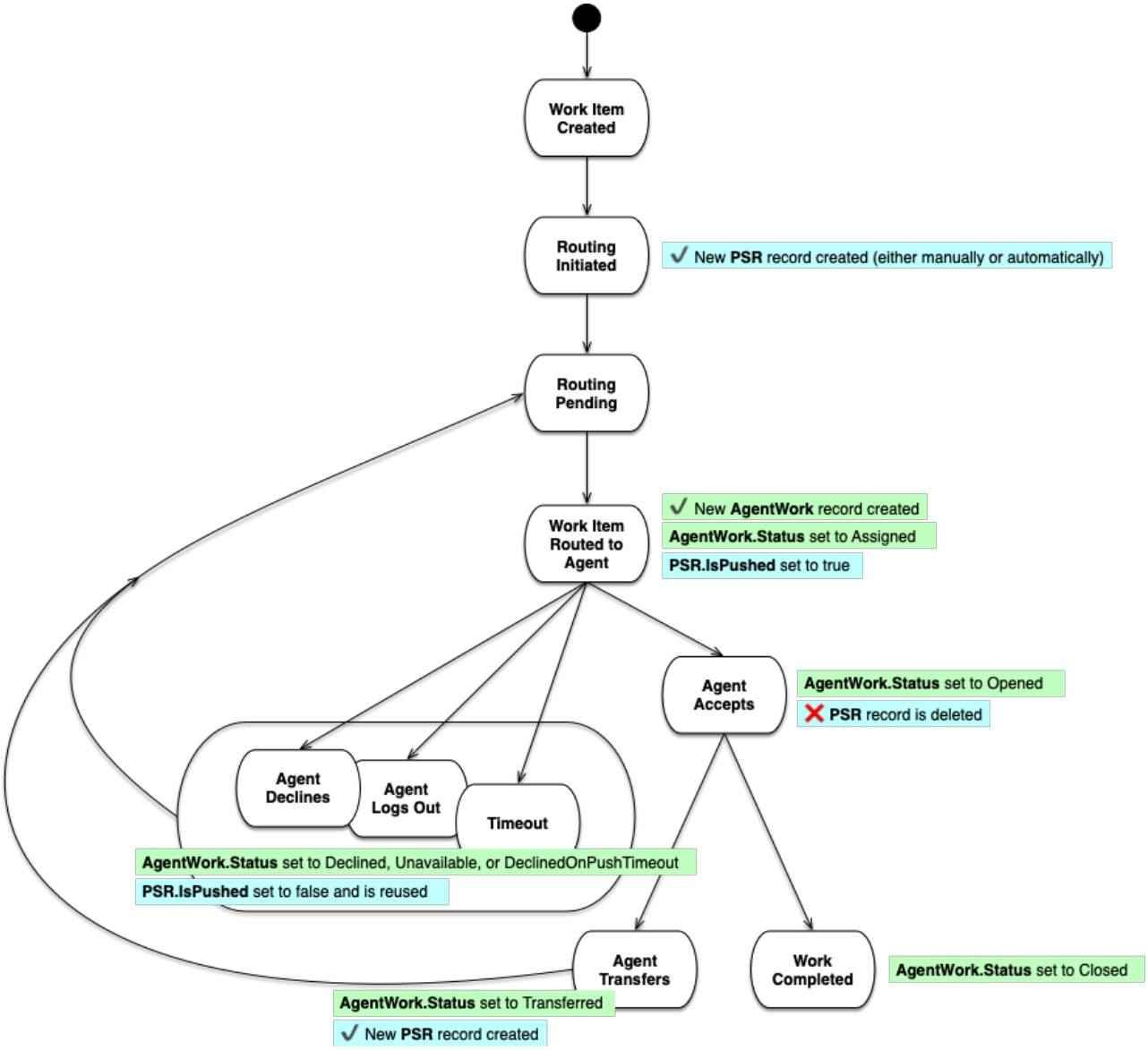
In queue-based routing or skills-based routing using a real-time channel (like Messaging and Chat), the PSR record is created automatically. However, you still may want to access this object for more complex use cases or for troubleshooting.

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's explicitly deleted.

Why does AgentWork contain multiple work records for the same work?

Each time a work item is assigned to an agent, a record is created in AgentWork. For example, if an agent transfers a work item to another agent, two records exist–one for each agent. If the work is assigned to a new agent but the original agent keeps the work open, AgentWork contains multiple active records for the work item–one for each agent. AgentWork can have multiple work records for the same agent and work item if the work item is routed to the same agent multiple times.

When is the AgentWork record set to Closed?

An AgentWork record isn't closed until one of these events happens.

- For tab-based capacity, a record closes when the assigned agent closes the work tab in the Service console.
- For status-based capacity, the record closes when the work has a completed status or the work is reassigned.

- If After Conversation Work is enabled, the work closes if the After Conversation Work period ends.

Why isn't a work item in a queue assigned to an agent in Omni-Channel?

Work isn't assigned to an agent if the queue doesn't have a routing configuration. Without a routing configuration assigned to the queue, Omni-Channel doesn't route work items in the queue.

Choose Your Routing Destination

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. Depending on your business needs, route work to agents, skills, queues, or bots.

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Route to a Queue
Route work to queues to distribute the workload among a team of agents.

Route to a Skill
Improve the quality of customer service by automatically routing each work item to the best agent for the job. With skills-based routing, route every work item to the agent who has the right skills to solve the problem.

Route to an Agent
Route work directly to the preferred agent. For example, you can route sales calls from existing customers to their account executives.

Route to a Bot
Route conversations to an enhanced bot over Messaging for In-App and Web channels, based on your business criteria. You can add powerful business rules to an Omni-Channel flow to send a conversation to a bot.

Route to a Queue

Route work to queues to distribute the workload among a team of agents.

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Note: Implement this feature in one click with the Service Setup Assistant: Learn more

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.
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.

Prepare to Route to Queues
Verify that you've completed these prerequisite tasks before you set up rules to route work to queues.

Prepare to Route to Queues

Verify that you've completed these prerequisite tasks before you set up rules to route work to queues.

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1. Create the queues.
2. Define routing configuration.
3. To route calls, map your Salesforce queues to the telephony provider queues.

Route to a Skill

Improve the quality of customer service by automatically routing each work item to the best agent for the job. With skills-based routing, route every work item to the agent who has the right skills to solve the problem.

Available in: Lightning Experience

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

To implement skills-based routing, you define logic that determines the skills needed to route work items and identify each agent's skills.

To define logic that determines the skills needed to route work items, use one of these methods.

- Route work using an Omni-Channel flow. Omni-Channel flow offers the greatest flexibility and features not available with skills-based routing rules. With a flow, you can define skill requirements dynamically for each work item and run skills-based routing rules. See Route Work Items to Skills.
- Route work using skills-based routing rules. See Routing with Skills-Based Routing Rules.

To assign skills to agents, define each agent skill, and then assign them to agents. To assign a skill to an agent, assign the skill to a service resource and then assign the service resource to the agent. If an agent isn't assigned a service resource, the agent doesn't appear in Omni Supervisor when they're offline.

1. How Does Skills-Based Routing Work?
   For a work item that requires specific skills, Omni-Channel routes the item to an agent who has all of the requisite skills and who has available capacity to take on the work.
2. 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.
3. Prepare to Route to Skills
   Before you set up routing to skills, review the skills-based routing limitations, set up Omni-Channel, and complete these prerequisite tasks.
4. Skills-Based Routing Limitations
   Before you implement skills-based routing, review the skills-based-routing limitations.

SEE ALSO:

Transfer a Work Item to a Different Skill Set

Understand the Details of the Routing Lifecycle

How Does Skills-Based Routing Work?

For a work item that requires specific skills, Omni-Channel routes the item to an agent who has all of the requisite skills and who has available capacity to take on the work.

Available in: Lightning Experience

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

When routing a work item, Omni-Channel determines the required skills based on the routing configuration, skills-based routing rules, and Omni-Channel flow. Skills defined in the routing configuration are added to all work items routed using that configuration. Skills defined in a skills-based routing rule or Omni-Channel flow are added if the work item meets the specified criteria. To match the right agent, Omni-Channel compares the required skills for the work item against the skills assigned to agents.

When a work item is routed to a skill that multiple agents have, the work item is routed to the first available agent based on the routing type (most available or least active).

If a work item requires certain skills, but no agents have those skills, the work item isn't routed. This situation is similar to how items in a queue are treated when no agents are online. If you use Omni Supervisor, a supervisor can look at the Skills Backlog tab to see which work items that require a skill haven't been assigned to an agent.

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: Lightning Experience

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

Queues generally are designed to represent one skill. For example, you can have a queue for Spanish-speaking agents and a queue for Level 3 technical support calls. With queue-based routing, Omni-Channel routes each work item to an agent who is a member of the queue.

In contrast, with skills-based routing, Omni-Channel routes the work item to an agent who has all the requisite skills and who has available capacity to take on the work.

Prepare to Route to Skills

Before you set up routing to skills, review the skills-based routing limitations, set up Omni-Channel, and complete these prerequisite tasks.

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Before you route to skills, review the limitations. See Skills-Based Routing Limitations.

Tip: 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.

Enable Skills-Based Routing

To route work to agents with specific skills, enable skill-based routing.

Create Skills for Skills-Based Routing

Define agent skills that Omni-Channel can use to route work items to the most qualified agent and that agents can search for when transferring work items. Skills identify your agents' areas of expertise. For example, you can define skills for language (Spanish, French, and English), product knowledge (software and hardware), and certifications (CompTIA and CCNP).

Assign Skills to Service Resources

To track each agent's areas of experience and their level of proficiency for each skill, assign skills to their service resource.

SEE ALSO:

Skills-Based Routing Limitations

Set Up Omni-Channel

Enable Skills-Based Routing

To route work to agents with specific skills, enable skill-based routing.

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Omni-Channel:
- "Customize Application"

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

Create Skills for Skills-Based Routing

Define agent skills that Omni-Channel can use to route work items to the most qualified agent and that agents can search for when transferring work items. Skills identify your agents' areas of expertise. For example, you can define skills for language (Spanish, French, and English), product knowledge (software and hardware), and certifications (CompTIA and CCNP).

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Omni-Channel:
- "Customize Application"

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

Assign Skills to Service Resources

To track each agent's areas of experience and their level of proficiency for each skill, assign skills to their service resource.

Available in: Lightning Experience

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

USER PERMISSIONS

To assign skills to service resources:

- "Edit" on service resources

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.

SEE ALSO:

Create Service Resources for Agents

Skills-Based Routing Limitations

Before you implement skills-based routing, review the skills-based-routing limitations.

Available in: Lightning Experience

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

These limitations apply when you use skills-based routing rules or Omni-Channel flows that route to skills.

- Skills-based routing isn't supported for external routing.
- Skills-based routing doesn't support Voice Calls.
- These types of transfers aren't supported for chat.
  - Transfer from a queue to a skill

- Transfer from a skill to a queue, unless you're transferring chats from a Service Chat and Embedded Chat standard channel
- Transfer from a skill directly to a user or button

SEE ALSO:

Route to a Skill

Route to an Agent

Route work directly to the preferred agent. For example, you can route sales calls from existing customers to their account executives.

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Prepare to Route to Agents

Verify that you've completed these prerequisite tasks before you set up rules to route work directly to agents.

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1. Set up agent statuses and capacity.
2. Create service resources for agents.
3. To route calls to an agent, either directly or via a queue, add agents to the contact center.
4. Map your existing Salesforce users to telephony provider users.

Route to a Bot

Route conversations to an enhanced bot over Messaging for In-App and Web channels, based on your business criteria. You can add powerful business rules to an Omni-Channel flow to send a conversation to a bot.

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SEE ALSO:

Route Conversations to an Enhanced Bot

Configure Your Routing Rules

You can use these ways to route work.

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Basic Routing
Use Omni-Channel to route work from a channel directly to a queue. For example, you can route calls received from a specific phone channel to a specific queue. To specify the queue, edit the contact center channel.

Advanced Routing with Omni-Channel Flows
Omni-Channel Flow brings all the functionality of Omni-Channel within Flow Builder. Use the power and flexibility of Flow Builder to define your routing rules and dynamically route work to the best agent. Omni-Channel Flow unifies the routing setup for all supported channels, including voice calls, chats, messaging sessions, cases, leads, and custom objects.

Routing with Skills-Based Routing Rules
Create skills-based routing rules to define when to require specific skills when routing work to agents. For example, define a rule that routes calls about product returns to an agent who knows how to process returns.

External Routing
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.

Basic Routing

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Route Chats to a Queue
To route chats, edit the chat button, and then specify the routing method and queue.

Route Calls to a Queue
To route calls in a phone channel, edit the contact center channel, and then specify the routing method and queue for the channel.

Route Messages to a Queue
To route messaging sessions in a messaging channel, edit the channel, and then specify the routing method and queue for the channel.

Route Chats to a Queue

To route chats, edit the chat button, and then specify the routing method and queue.

Available in: Lightning Experience

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

1. From Setup in the Quick Find box, enter `Chat Buttons & Invitations`, and then select **Chat Buttons & Invitations**.
2. Edit an existing chat button.
3. In the Routing Information section, for **Routing Type**, select **Queue**.
4. Select the queue to route the chats to. The queue manages and prioritizes chats. If the agents assigned to the queue are online and have capacity, the button is available.

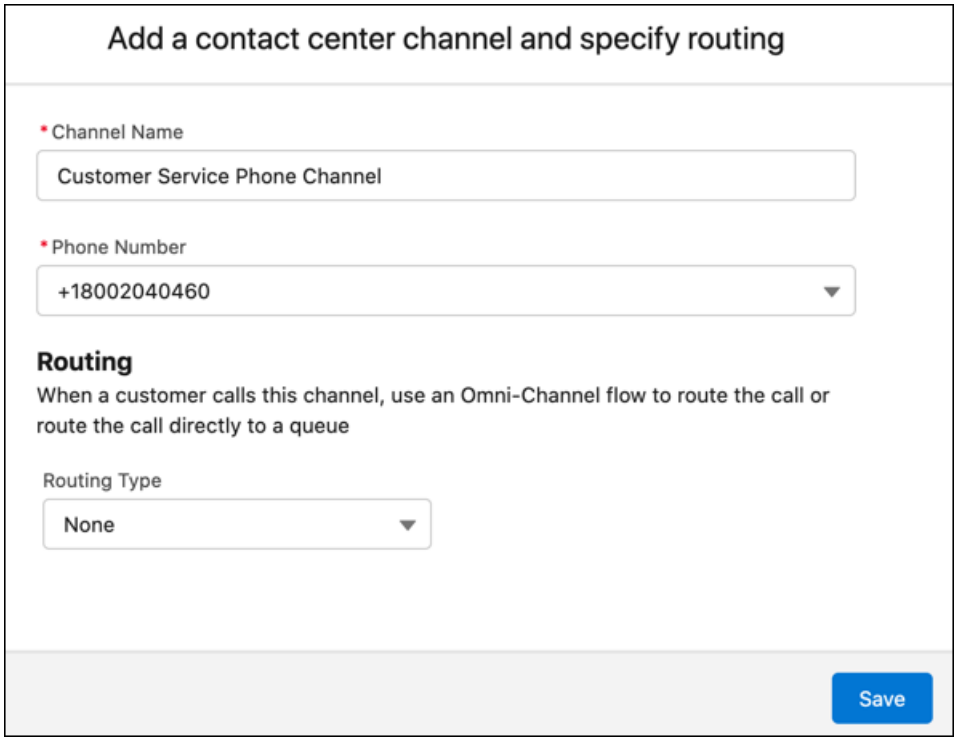
Route Calls to a Queue

To route calls in a phone channel, edit the contact center channel, and then specify the routing method and queue for the channel.

Available in: Lightning Experience

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

1. From Setup in the Quick Find box, enter *`Voice`*, and then select **Amazon Contact Centers** or **Partner Telephony Contact Centers**, depending on your telephony system.
2. Open and edit the contact center.
3. To route calls from this channel to a queue, in the Routing Type field, select **Queue**, and then select the queue.



4. Click **Save**.

Route Messages to a Queue

To route messaging sessions in a messaging channel, edit the channel, and then specify the routing method and queue for the channel.

Available in: Lightning Experience

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

1. From Setup in the Quick Find box, enter `Messaging`, and then select **Messaging Settings**.
2. Under Channels, open and edit the existing messaging channel.
3. Under Routing, enter the routing properties.

Property	Description
Enable Advanced Routing (Beta)	To route work to a queue, clear this option. This option routes messaging sessions in this channel based on the logic defined in an Omni-Channel flow.
Routing Type	Select **Omni-Channel**.
Queue	Specify the queue to which you want to route messaging sessions in this channel. The queue manages and prioritizes sessions to this channel.

4. Under Automated Responses, enter the consent settings, conversation responses, and help.
5. Click **Save**.

Advanced Routing with Omni-Channel Flows

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How Does an Omni-Channel Flow Work?

When your customer initiates a chat, voice, or messaging conversation, launch an Omni-Channel flow to route the work item to a queue, skills, agent, or bot.

Create an Omni-Channel Flow

Create a flow from scratch. Or, get a headstart by creating one from an Omni-Channel flow template. The templates illustrate how to create flows that route chats, voice calls, and messages to agents, queues, and skills. You can also use a template to create a case for each inbound call. You can customize flows built from templates to meet your business needs.

Create Cases for Inbound Calls with an Omni-Channel Flow Template

Save yourself time setting up this routing logic by using the Basic Routing with Case Creation template. This template identifies the caller, routes the call to a queue, creates a case for the call, and screen-pops the new case record when the agent accepts the call. If needed, modify the Omni-Channel flow to change the default routing behavior, such as the queue.

Assign an Omni-Channel Flow to a Chat Button

Route chats to the best agent dynamically using the Omni-Channel routing type and Omni-Channel flows.

Assign an Omni-Channel Flow to a Phone Channel

Your contact center can have multiple phone channels that your customers can call, such one for Support and another for Sales. Each channel has its own phone number. To route calls in a phone channel, create the channel in the contact center and then specify the routing method for the channel. To dynamically route calls with an Omni-Channel flow, assign the flow to the channel.

Assign an Omni-Channel Flow to Route Cases from Email-to-Case

Route cases from your customer support emails to qualified agents with an Omni-Channel flow.

Invoke an Omni-Channel Flow to Route Non-Real-Time Objects

To route non-real-time objects, such as cases, leads, and custom objects, define the routing logic in an Omni-Channel flow, and then invoke the flow from a parent flow based on your business rules. For example, to trigger the flow to run when cases are created, add it as a subflow in a record-triggered flow. Or, to perform a custom transfer process, add it as a subflow in a screen flow.

Considerations and Limitations

Consider these Omni-Channel flow limitations.

SEE ALSO:

Build a Flow (can be outdated or unavailable during release preview)

How Does an Omni-Channel Flow Work?

When your customer initiates a chat, voice, or messaging conversation, launch an Omni-Channel flow to route the work item to a queue, skills, agent, or bot.

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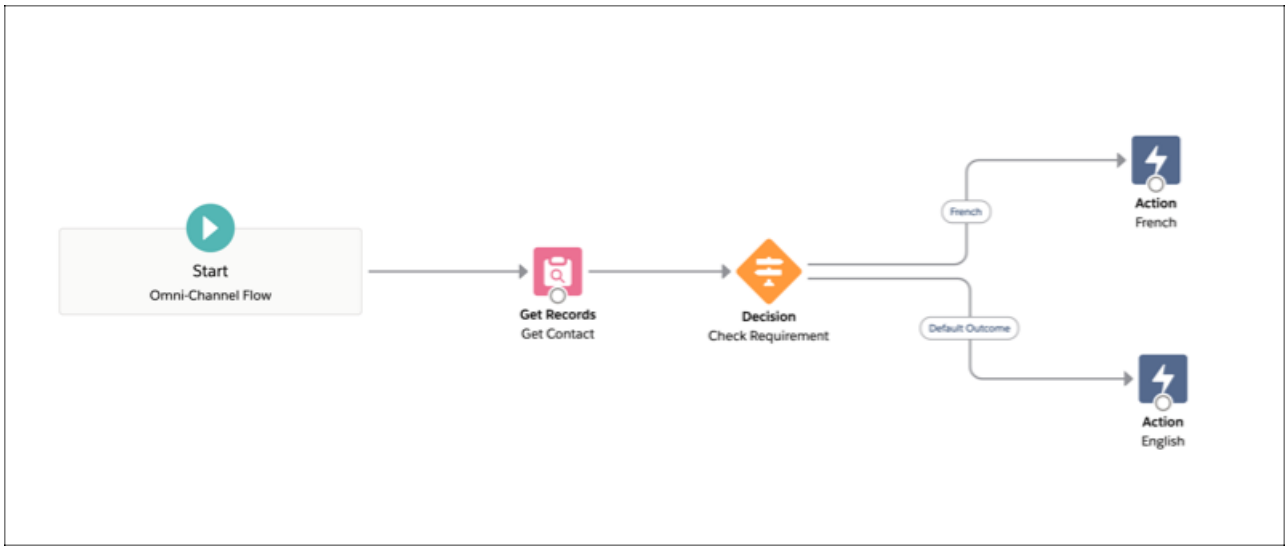
To see some possibilities of routing with an Omni-Channel flow, look at a sample flow.



In the previous example, the flow runs at the start of a chat conversation. The Get Records element obtains the customer's Contact record. The Decision element checks that record for the customer's language. The flow then executes the appropriate Route Work action based on the customer's language. Route work to Queue 1 for an English-speaking agent or to Queue 2 for a French-speaking agent. Route Work actions are the last elements in a flow. Use them to route work to queues, agents, or skills.

To understand how to route a work item, Omni Channel identifies the routing information specified in the service channel details. To route work items using an Omni-Channel flow, you have to create the flow and then assign it to the service channel. To see an example about how to assign an Omni-Channel flow to a phone channel, see Create a Phone Channel.

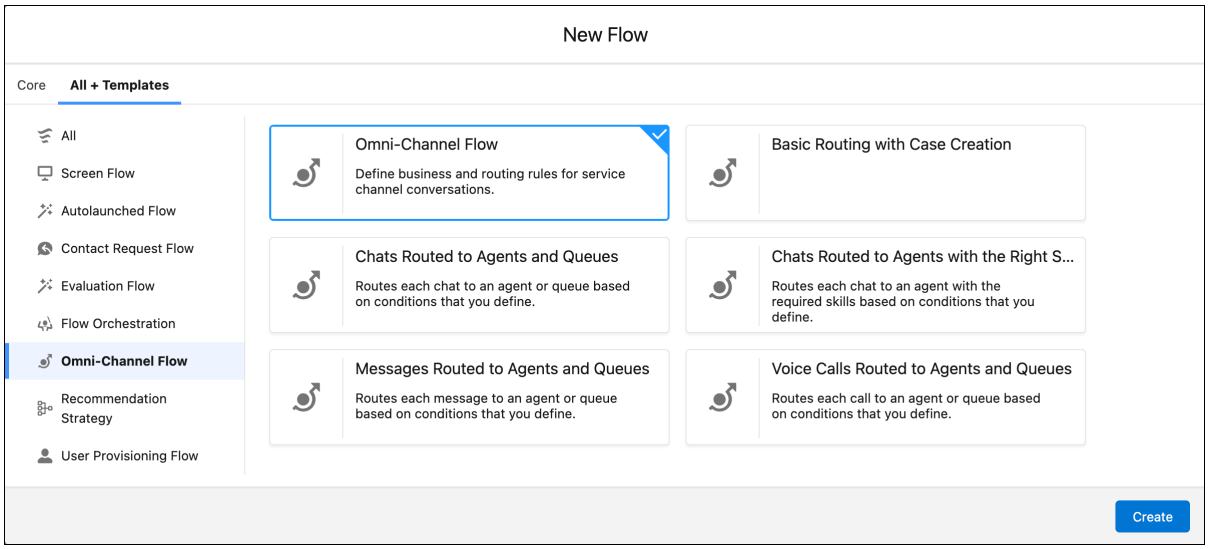
Create an Omni-Channel Flow

Create a flow from scratch. Or, get a headstart by creating one from an Omni-Channel flow template. The templates illustrate how to create flows that route chats, voice calls, and messages to agents, queues, and skills. You can also use a template to create a case for each inbound call. You can customize flows built from templates to meet your business needs.

Available in: Lightning Experience

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

1. In the Quick Find box under Setup, enter `Flows`, and then select **Flows** under Process Automation.
2. Click **New Flow**.
3. Click **All + Templates**.
4. To filter the flow types to Omni-Channel flows, select **Omni-Channel Flow** in the left pane of the New Flow screen.



5. To create a flow from a template, select one of the following templates.

Omni-Channel Flow Template	Description
Basic Routing with Case Creation	Creates a case for each inbound call.
Chats Routed to Agents and Queues	Routes each chat to an agent or queue based on conditions that you define.
Chats Routed to Agents with the Right Skills	Routes each chat to an agent with the required skills based on conditions that you define.
Voice Calls Routed to Agents and Queues	Routes each call to an agent or queue based on conditions that you define.
Messages Routed to Agents and Queues	Routes each message to an agent or queue based on conditions that you define.

6. To create a flow from scratch, click **Omni-Channel Flow**.
7. Click **Next**.
8. Create these variables to store values in your flow.

Variable	Resource Type	Description
recordId	Variable	Stores the ID that uniquely identifies the work record being routed. For example, if the flow routes a voice call, it stores the voice call ID.
input_record	Record (Singles) Variable	Stores the work record that's being routed, including all fields and input values. For example, if the flow routes a chat, it stores the entire chat record from the Chat Transcript object.

9. Add at least one Route Work action to route the work.

Route Work actions are the last objects in the flow.

10. Click **Save**.

About Flow Variables

Create the following variables to store values in your flow: recordId, skillList, prechat, and input_record. RecordId is required. SkillList, prechat, and input_record are optional based on your flow logic.

Add Screen Pops to Give Agents More Context about Conversations

By default, only the primary work record opens when an agent accepts a work item. But, with more context, agents can provide more personalized service for each customer. To automatically open records or screen flows on the agent's screen when a voice call, message, or chat is routed to the agent, include an Add Screen Pop action in the Omni-Channel flow. You can open up to a total of three records or screen flows. For example, you can show the customer's case and contact records and open the Channel-Object Linking screen flow as a subtab.

Make Smarter Routing Decisions by Checking Agent Availability

Optimize routing by using information collected about your organization's capacity to handle new work requests. Add the Check Availability for Routing action to an Omni-Channel flow to determine agent availability and estimated wait time. This action can return the number of online agents and number of work items waiting to be picked up given the specified routing requirements, including routing type and parameters. It can also estimate how long the customer has to wait before they reach an agent. You can then build routing logic based on the results. For example, if the agent has more than five backlogged work items in their queue, you can route work to another queue instead.

Route Work Items to Queues

Automatically route work to a specific queue using variables.

Route Work Items to Skills

Automatically route work items to qualified agents who have specific skills. In the Omni-Channel flow, attach the skill requirements to the work items.

Route Work Items Directly to a Specific Agent

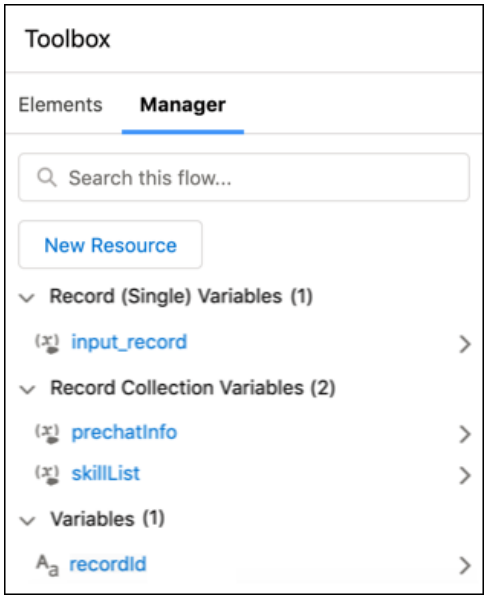
Automatically route work items directly to an agent using Direct-to-Agent routing.

Route Work Items to an Enhanced Bot

Automatically route conversations to an enhanced bot using enhanced Messaging channels, based on your business criteria.

About Flow Variables

Create the following variables to store values in your flow: recordId, skillList, prechat, and input_record. RecordId is required. SkillList, prechat, and input_record are optional based on your flow logic.



Create the recordId

To store the ID of the work item in the flow, create the recordId variable.

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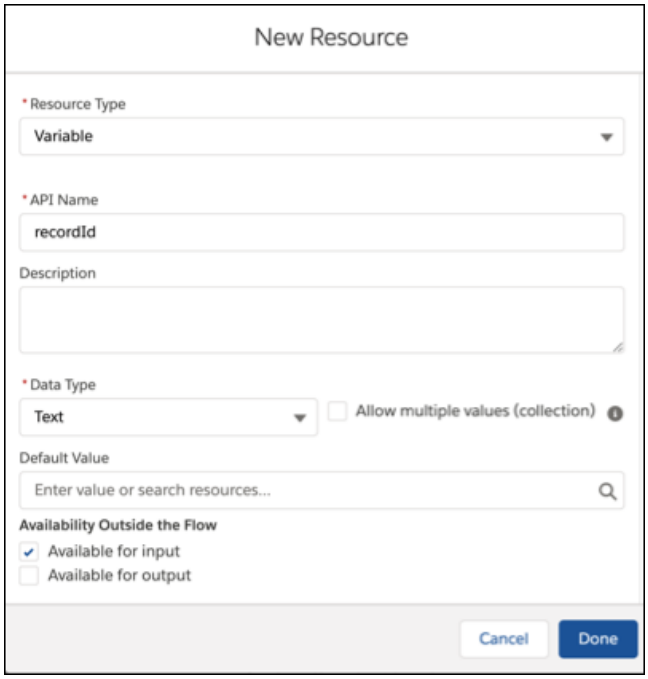
1. In the Flow Builder Toolbox, click **Manager** and then click **New Resource**.
2. For **Resource Type**, select **Variable**.
3. For **API Name**, enter `recordId`. **Note:** Make sure to use this name, specifically.
4. For **Data Type**, select **Text**.
5. Under **Availability Outside the Flow**, select **Available for input**.

6. Click **Done**.



Create the skillList

To route work to agents with the right skills, identify the required skills and store them in a record collection variable.

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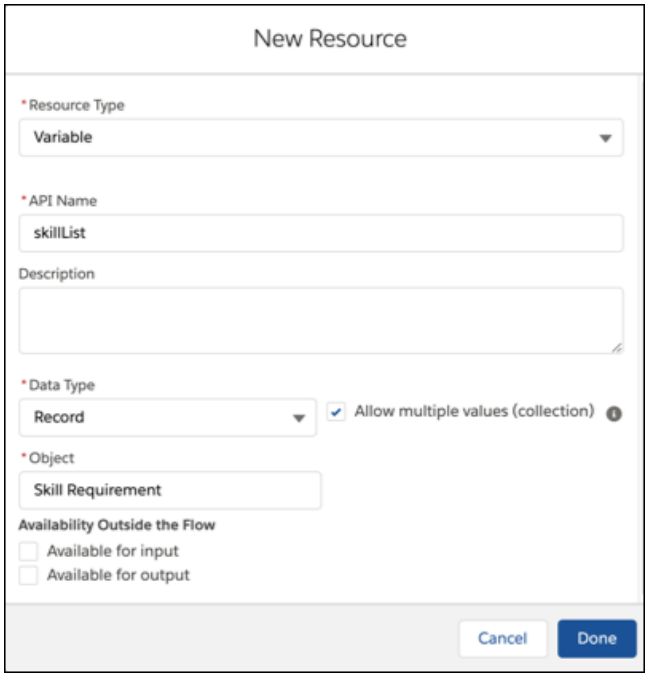
Note: You can't use skill-based routing for voice calls.

1. In the Flow Builder Toolbox, click **Manager** and then click **New Resource**.
2. For **Resource Type**, select **Variable**.
3. For **API Name**, enter `skillList`.
4. For **Data Type**, select **Record**.
5. Select **Allow multiple values (collection)**.
6. For **Object**, select **Skill Requirement**.
7. Click **Done**.



Create the prechat

To build a flow that routes chats based on information captured in a pre-chat form, add a prechat record collection variable. Set up the variable to pull pre-chat details from the Conversation Context Entry object.

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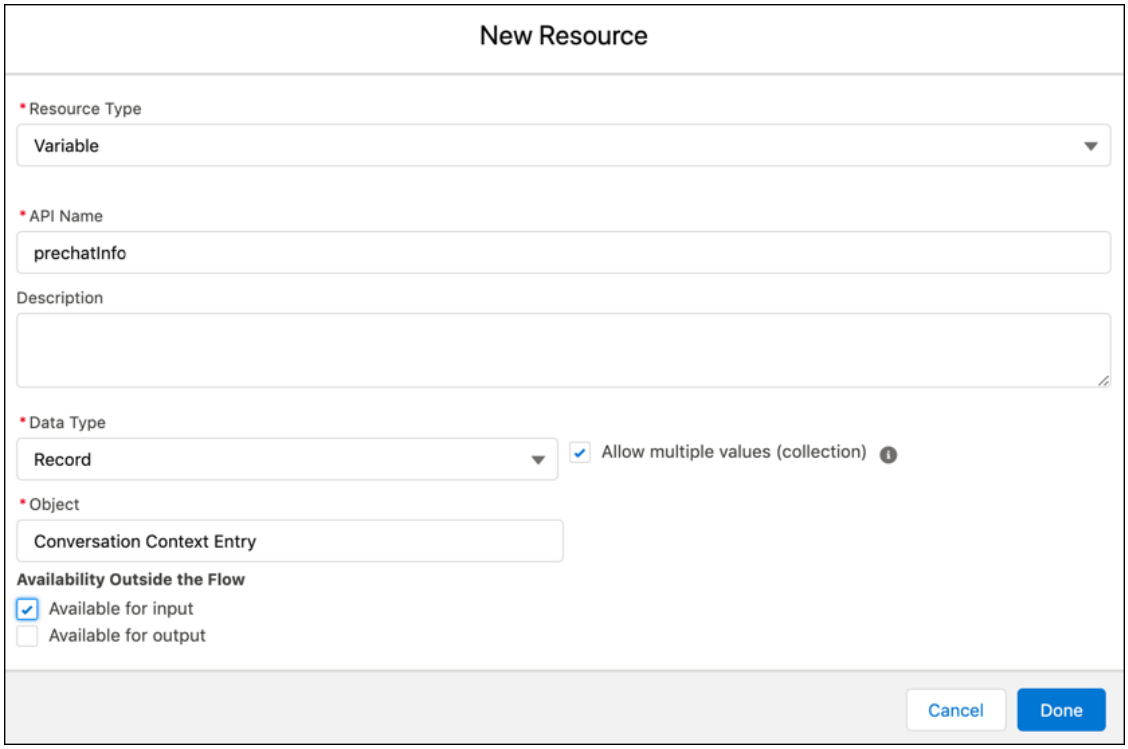
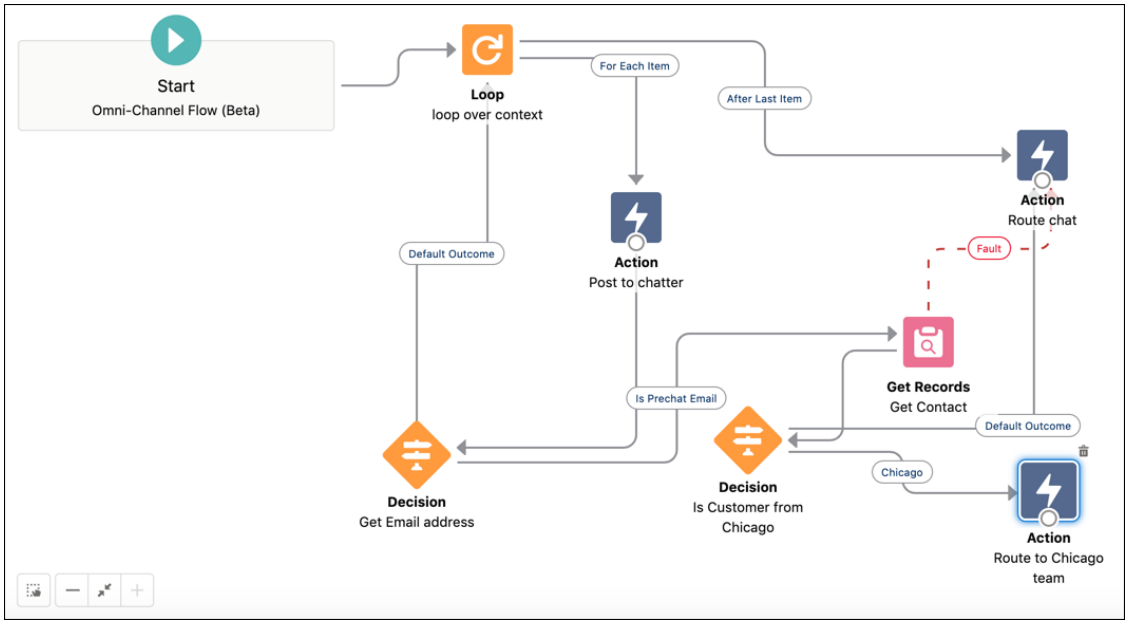
1. In the Flow Builder Toolbox, click **Manager** and then click **New Resource**.
2. For **Resource Type**, select **Variable**.
3. For **API Name**, enter `prechatInfo`.
4. For **Data Type**, select **Record**.
5. Select **Allow multiple values (collection)**.
6. For **Object**, select **Conversation Context Entry**.
7. Under **Availability Outside the Flow**, select **Available for input**.
8. Click **Done**.



Example: You want to route chats based on the customer's city. If the customer is from Chicago, then route the chat to the Chicago team. Otherwise, route it to a default queue. To automate this process before the chat begins, customers fill out a pre-chat form, where they provide their names and email addresses.

To use this pre-chat information in a flow, start by defining a pre-chat collection variable based on the Conversation Context Entry object. Then create a flow that loops through the pre-chat records to get the customer's email address. If found, the flow gets the customer record from the Contact object based on the provided email address. Finally, the flow routes the chat to the Chicago team if the customer record city is Chicago. Else, it routes the chat to the default queue.



Create the input_record

If you build a flow to route work based on field values in a Salesforce record, use a record variable to store the record.

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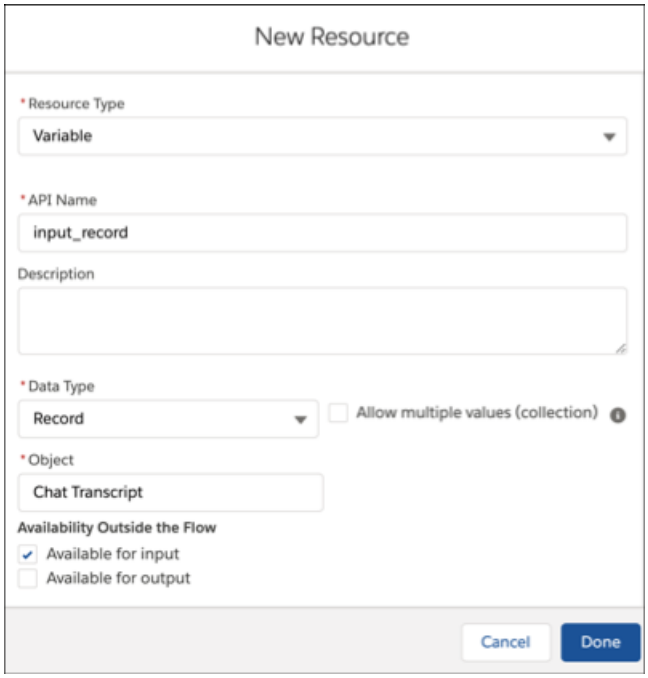
1. In the Flow Builder Toolbox, click **Manager** and then click **New Resource**.
2. For **Resource Type**, select **Variable**.
3. For **API Name**, enter `input_record`.
4. For **Data Type**, select **Record**.
5. For **Object**, select the Salesforce object.

   For example, to route chats based on the field values in the Chat Transcript record, select **Chat Transcript**. For calls, select **Voice Call**.
6. Under **Availability Outside the Flow**, select **Available for input**.
7. Click **Done**.



Create the *reasonForNotRouting*

To explain why a flow can't route a work item, create the *reasonForNotRouting* variable. You can use this variable in a Messaging for In-App and Web channel to return a reason why the flow can't route a messaging request.

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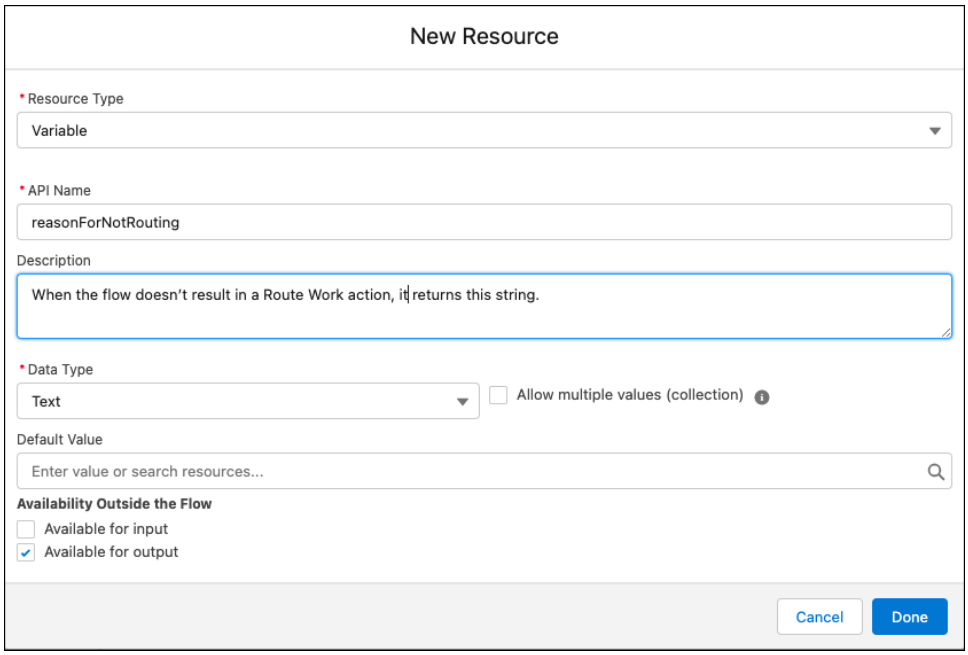
1. In the Flow Builder Toolbox, click **Manager** and then click **New Resource**.
2. For Resource Type, select **Variable**.
3. For API Name, enter `reasonForNotRouting`.
4. For Data Type, select **Text**.
5. Under Availability Outside the Flow, select **Available for output**.
6. Click **Done**.



If your Omni-Channel flow has a path that doesn't result in a Route Work action, the flow returns this string. For example, you can use an assignment element in the flow and set the variable to Outside business hours. If an agent isn't available because the messaging request occurs outside normal working hours, the flow logic returns this string in a Messaging for In-App and Web channel.

Add Screen Pops to Give Agents More Context about Conversations

By default, only the primary work record opens when an agent accepts a work item. But, with more context, agents can provide more personalized service for each customer. To automatically open records or screen flows on the agent's screen when a voice call, message, or chat is routed to the agent, include an Add Screen Pop action in the Omni-Channel flow. You can open up to a total of three records or screen flows. For example, you can show the customer's case and contact records and open the Channel-Object Linking screen flow as a subtab.

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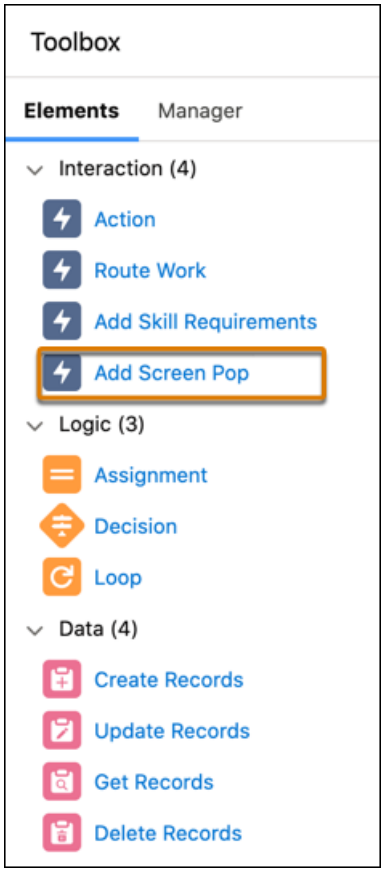
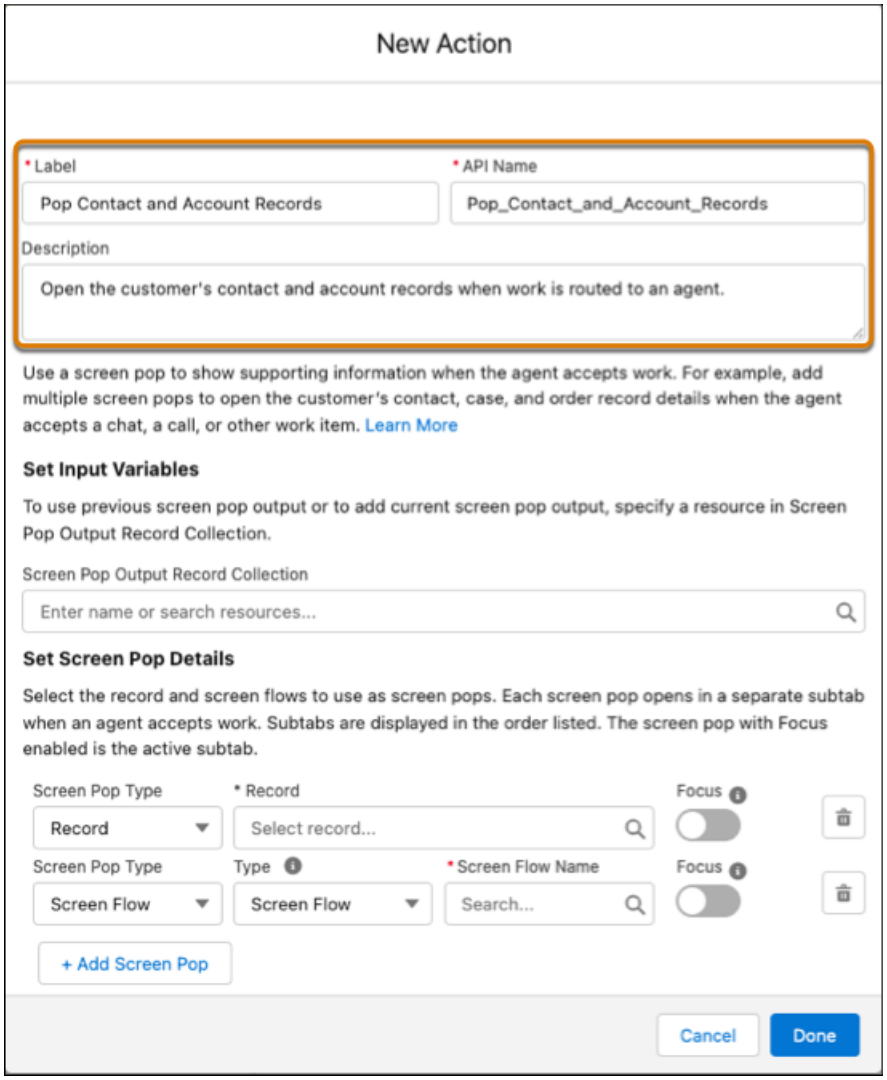
Note: The Add Screen Pop action doesn't open records or screen flows when an agent accepts transferred work. For example, Agent 1 accepts a chat. The action opens records on the agent's screen. Agent 1 transfers the chat to Agent 2. When Agent 2 accepts the chat, the action doesn't open any records or screen flows on Agent 2's screen.

1. Under the Elements tab of Flow Builder, drag the **Add Screen Pop** action onto the canvas.



2. Give the action a label, API name, and, optionally, a description.

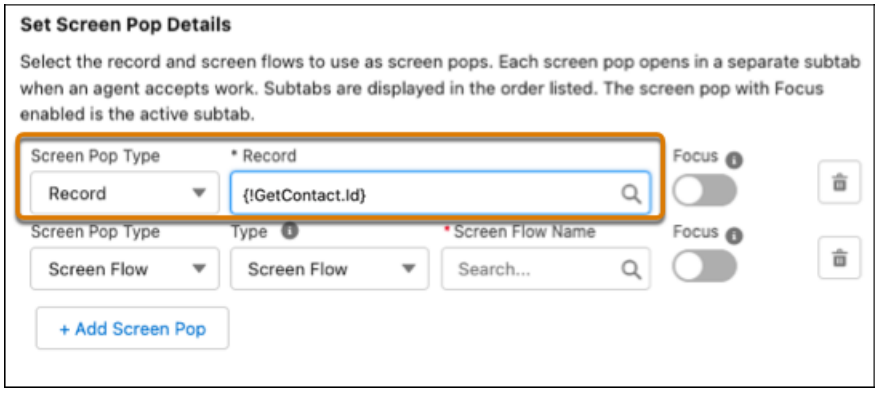


3. In the Set Collection Variable, optionally, select the output of the previous Add Screen Pop action to combine those screen pop instructions with the ones created by this action.

   For more information, see Using Multiple Add Screen Pop Actions in an Omni-Channel Flow.

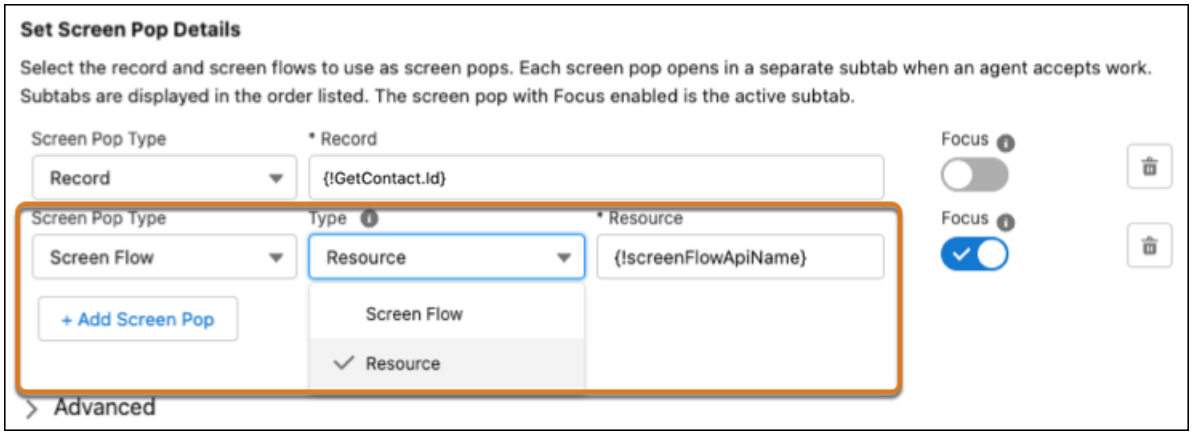
4. In Screen Pop Type for Record, select the ID field of the record you want to open. Or, enter the specific record ID value. If multiple records open on the agent's screen, toggle Focus to put this record in focus for the agent.

   For example, to open the contact record, select the contact record variable (which contains output from the Get Contact element), and then select the contact ID field.



Note: The order in which you define the records is the order in which they open on the agent's screen. If you don't set the focus, all records open, but the agent's screen focuses on the primary work record.

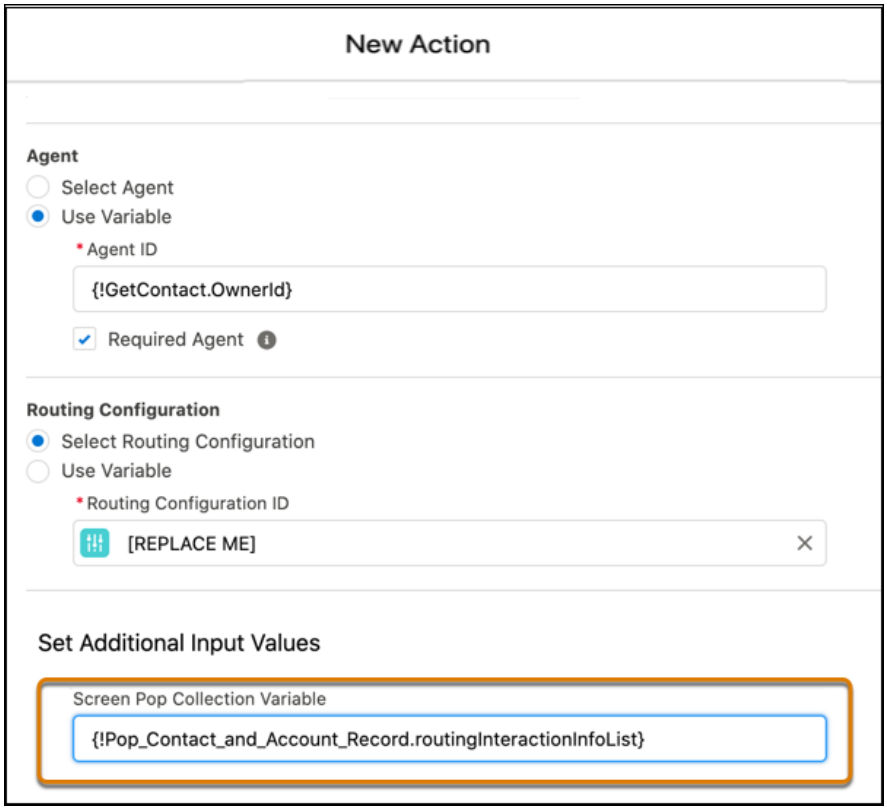
5. In Screen Pop Type for Screen Flow, select **Screen Flow** as the Type to choose from a list of active screen flows. Or, select **Resource** as the Type to choose your own flow variable.
   - The list of active screen flows shows a maximum of five flows, but you can search for other flows by typing in the Screen Flow Name field.
   - Resources appear only for valid and active screen flows and for fully qualified flow API names, including the name space prefix.



6. To open another record or screen flow, click **Add Screen Pop**. You can open up to three records or screen flows.
7. Click **Done**.

Don't forget to pass the screen pop instructions (the output from this action) as input to the Route Work action. Only screen pop instructions passed to the Route Work action are used to open records when the work is routed to the agent.

To add the screen pop instructions as input to a Route Work action, open the Route Work action. In the Screen Pop Collection Variable field, select the output from the Add Screen Pop action, and then select **routingInteractionInfoList**.



Tip: Use the Debug option in Flow Builder to validate this Add Screen Pop action along with the other elements in the Omni-Channel flow.

Using Multiple Add Screen Pop Actions in an Omni-Channel Flow

You can chain multiple Add Screen Pop actions together in the same flow. For example, add one action to open records regardless of which queue or agent the work is routed to. Then, add another action to open additional records based on who the work is routed to.

Store Screen Pop Instructions in a Variable

If you add multiple Add Screen Pop actions to a flow, define a collection variable to aggregate and store all screen pop instructions. By storing all instructions in a variable, you don't have to worry about the order in which the Add Screen Pop actions are added to the flow. To understand why order is important if you don't use a variable, consider this scenario. You create a flow that passes the output of Screen Pop 1 to Screen Pop 2, and then passes the output of Screen Pop 2 to the Route Work action. If you reorder the Add Screen Pop actions, you have to change the input screen pop instructions for each of them.

Using Multiple Add Screen Pop Actions in an Omni-Channel Flow

You can chain multiple Add Screen Pop actions together in the same flow. For example, add one action to open records regardless of which queue or agent the work is routed to. Then, add another action to open additional records based on who the work is routed to.

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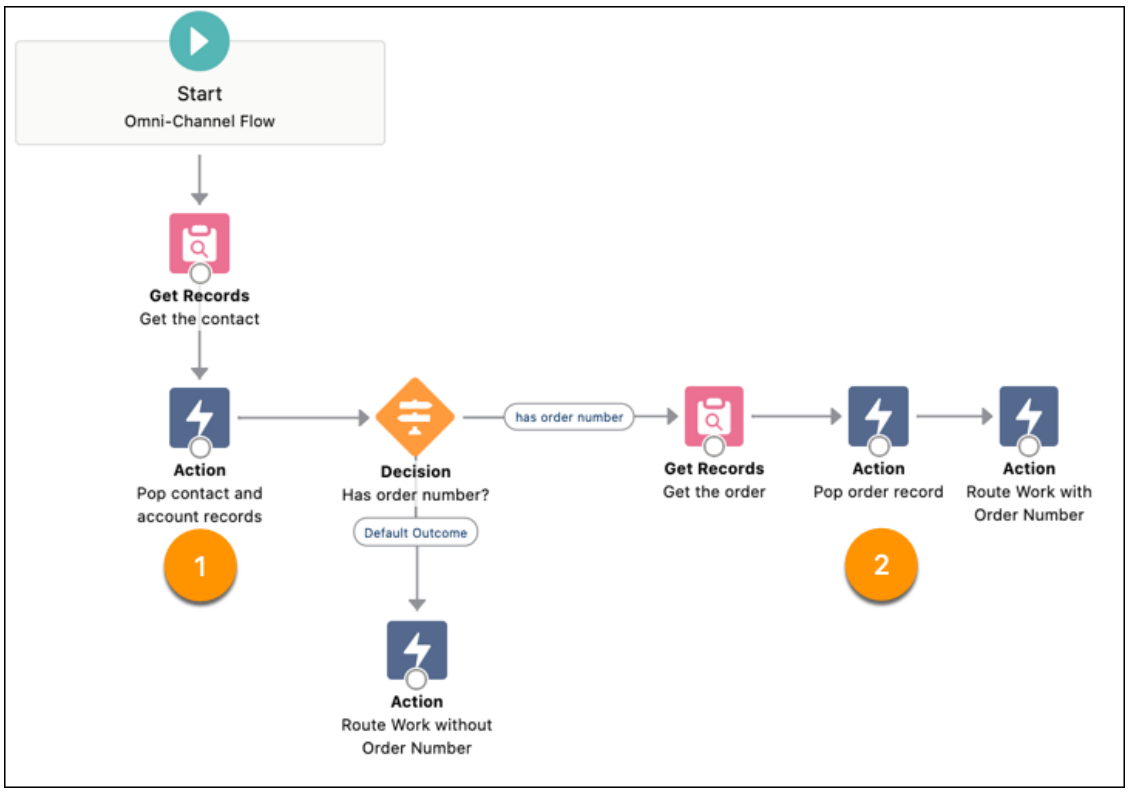
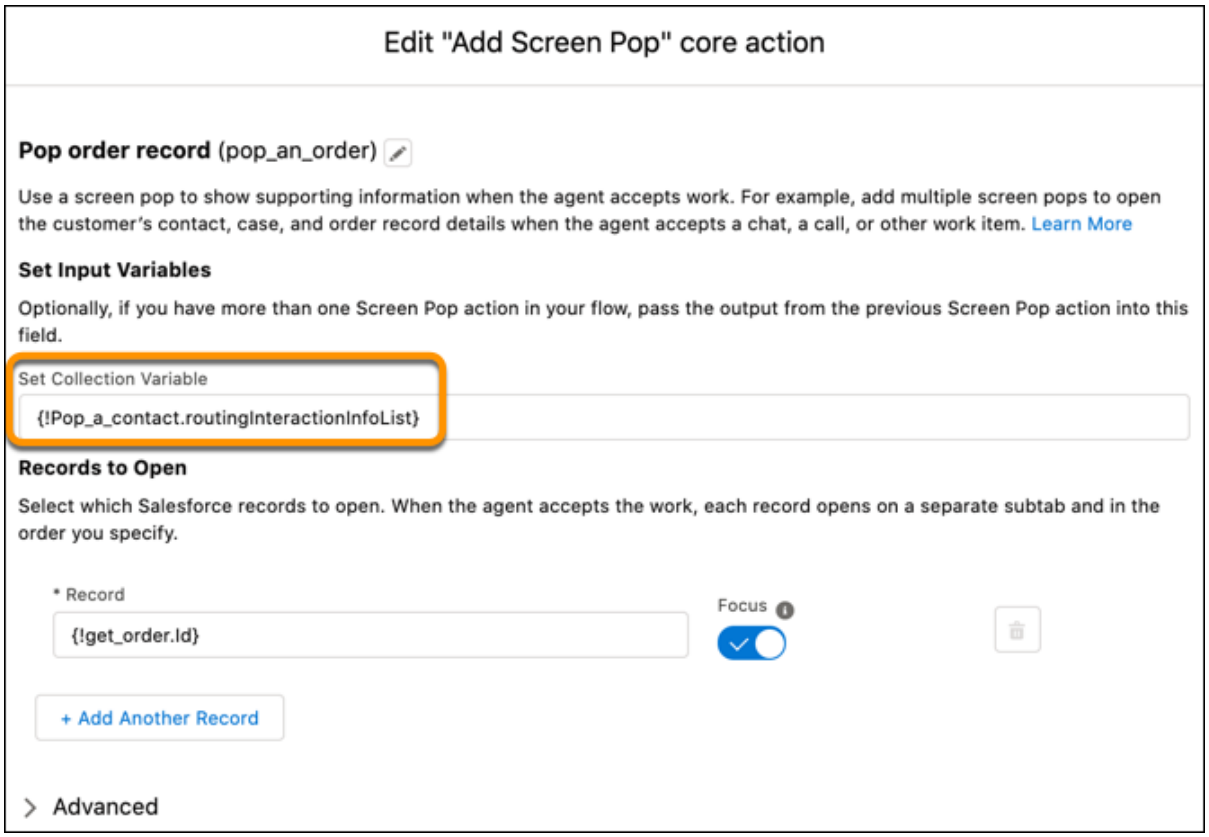
To send screen pop instructions from all Add Screen Pop actions to the Route Work action, pass the instructions from each Add Screen Pop action to the next one in the flow. Then, pass the last Add Screen Pop action's instructions to the Route Work action.

To understand how this process works, let's look at an example. This sample flow accepts the customer order number as input from the IVR. The first Add Screen Pop action opens the contact and account records for the caller. If the caller provides an order number, the second Add Screen Pop action opens a third record, the order record associated with the order number.

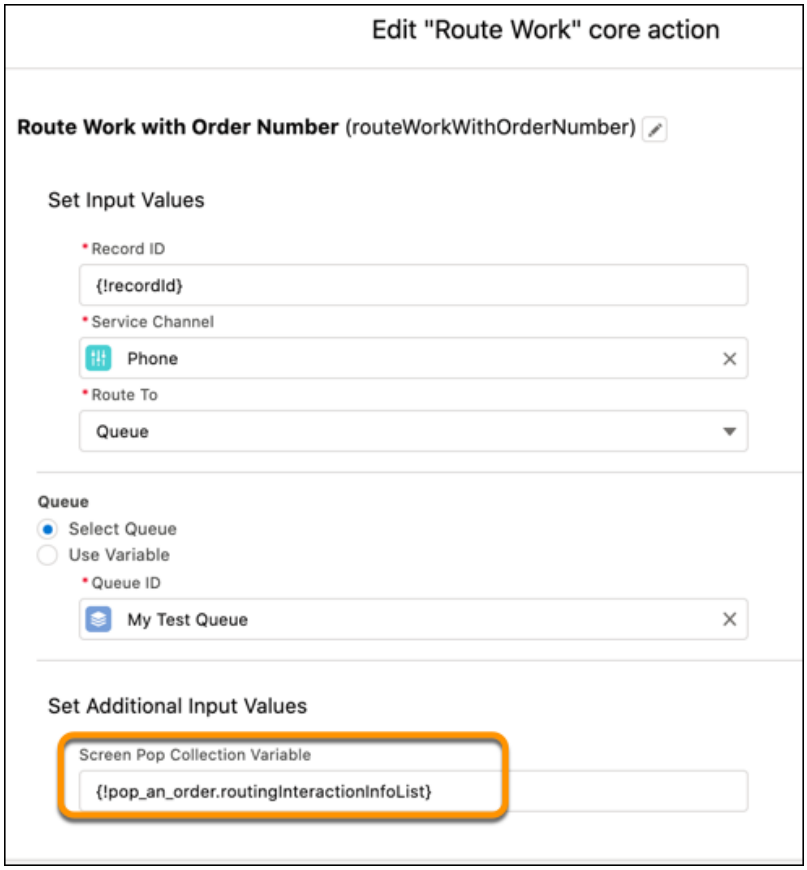


The screen pop instructions from first Add Screen Pop action (1) is passed to the second Add Screen Pop action (2). The second action passes the aggregated instructions from both Add Screen Pop actions to the Route Work action.

To pass the instructions from the first Add Screen Pop action to the next, in the Set Collection Variable field of the second Add Screen Pop action, select the output from the first Add Screen Pop action. In general, use this variable to append the output from the previous screen pop action and pass the results to the Route Work action.



Next, pass these screen pop instructions from the second Add Screen Pop action to the Route Work action. Only the screen pop instructions passed to the Route Work action open records when the work is routed to the agent.



Important: All Add Screen Pop actions combined can open a total of three records. If they're set up to open more than three, the flow stores the screen pop instructions for the first three records and ignores the rest. Also, you can enable the Focus toggle for only one record in an Add Screen Pop action. If the Focus toggle is enabled for multiple Add Screen Pop actions, the last-defined Focus setting takes precedence.

Tip: If you add multiple Add Screen Pop actions in a flow, define a collection variable to store all screen pop instructions.

Store Screen Pop Instructions in a Variable

If you add multiple Add Screen Pop actions to a flow, define a collection variable to aggregate and store all screen pop instructions. By storing all instructions in a variable, you don't have to worry about the order in which the Add Screen Pop actions are added to the flow. To understand why order is important if you don't use a variable, consider this scenario. You create a flow that passes the output of Screen Pop 1 to Screen Pop 2, and then passes the output of Screen Pop 2 to the Route Work action. If you reorder the Add Screen Pop actions, you have to change the input screen pop instructions for each of them.

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1. Define a variable to store the Add Screen Pop action's instructions.
   a. In the Toolbox, select the Manager tab.

b. Click **New Resource**.

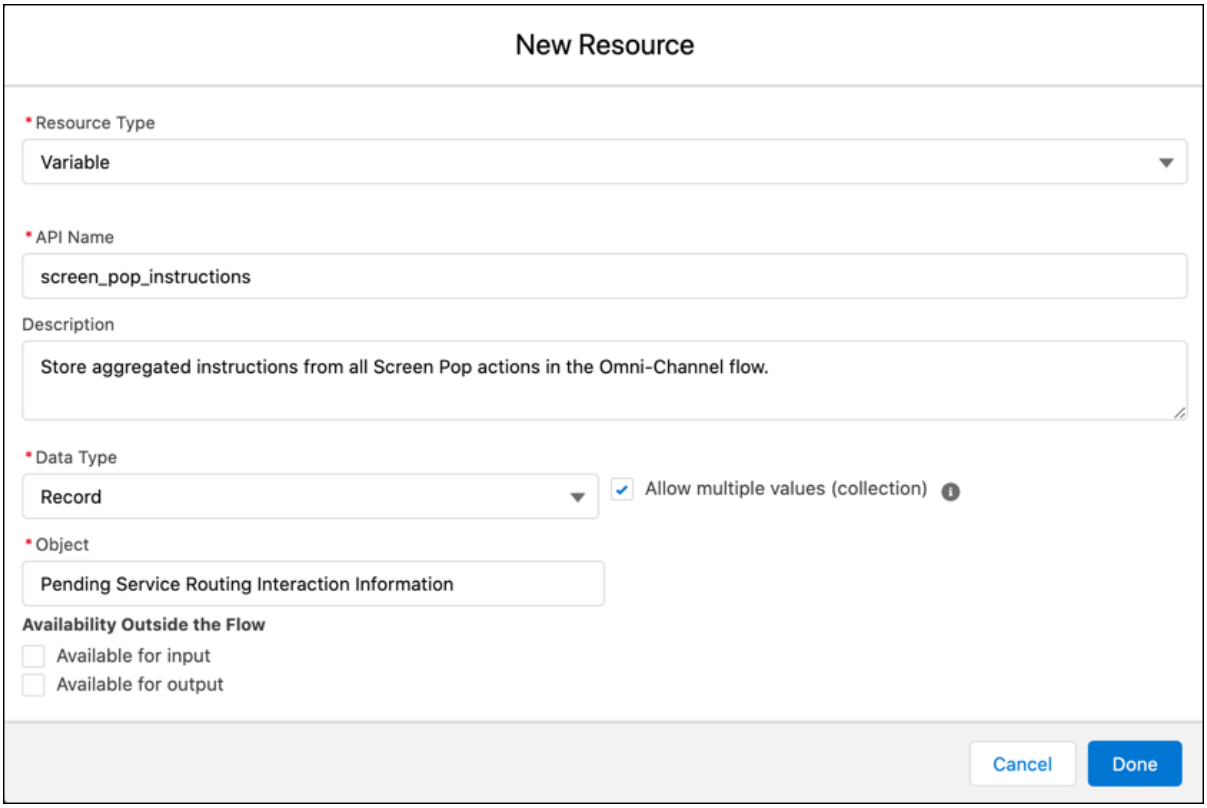
c. In Resource Type, select **Variable**.

d. Enter the API name and, optionally, a description.

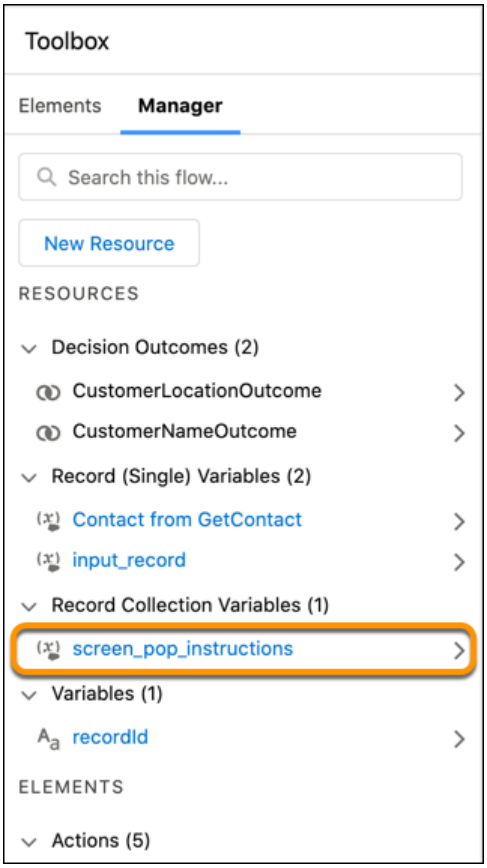
e. In Data Type, select **Record**.

f. Select the **Allow multiple values (collection)** checkbox.

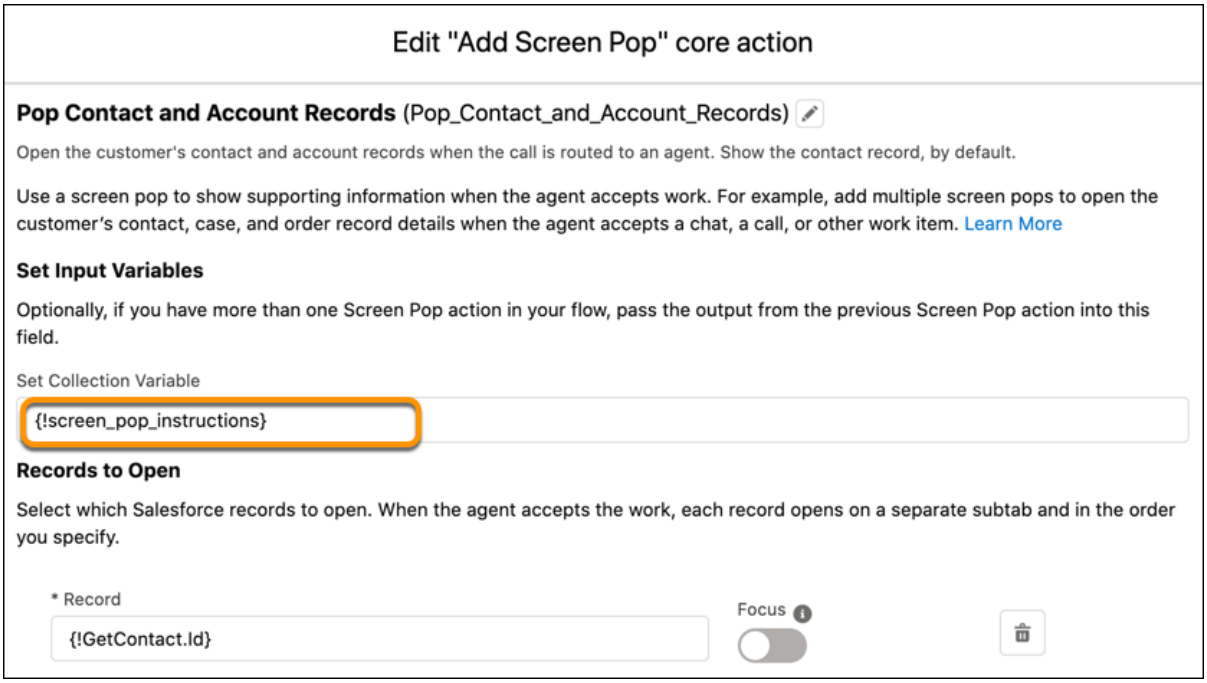
g. In Object, select **Pending Service Routing Interaction Information**.



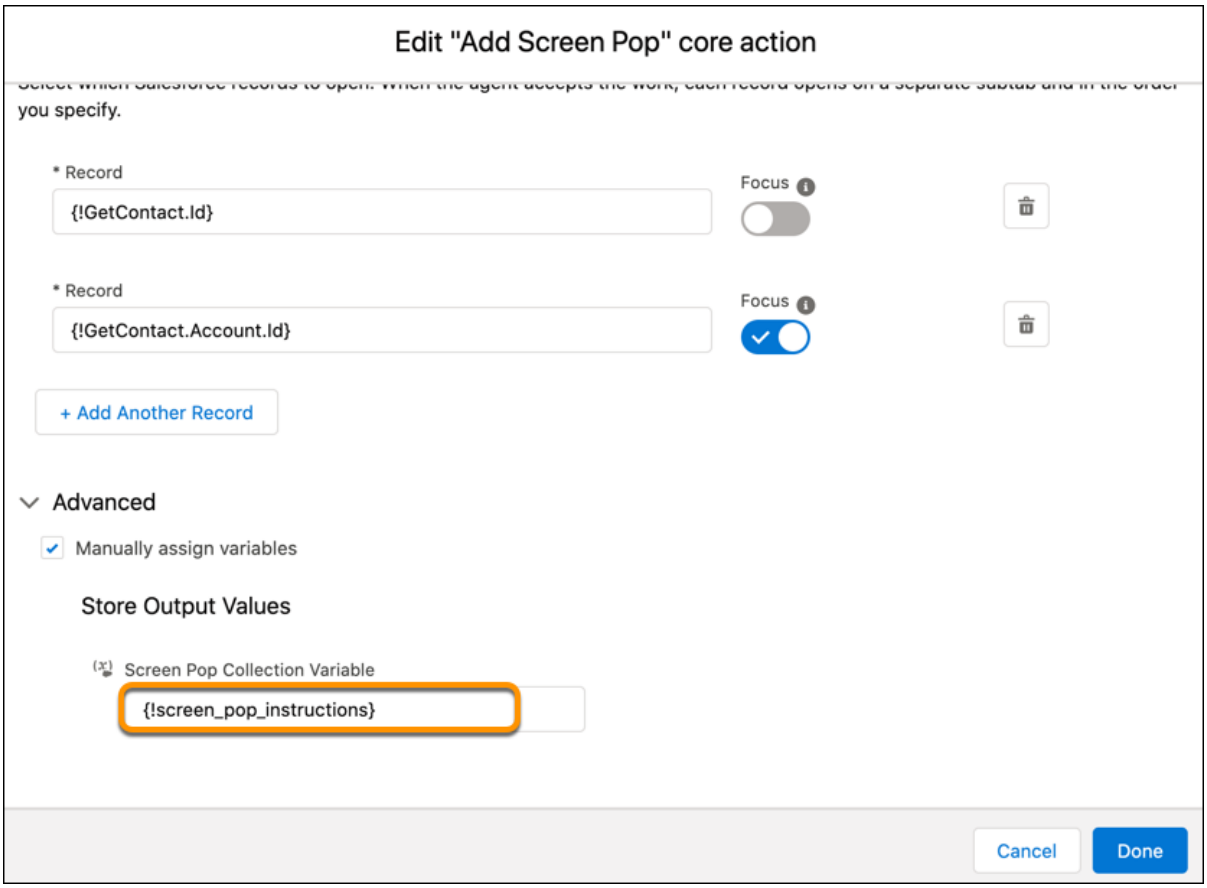
h. Click **Done**.
The variable appears under Record Collection Variables in the Manager tab of Toolbox.



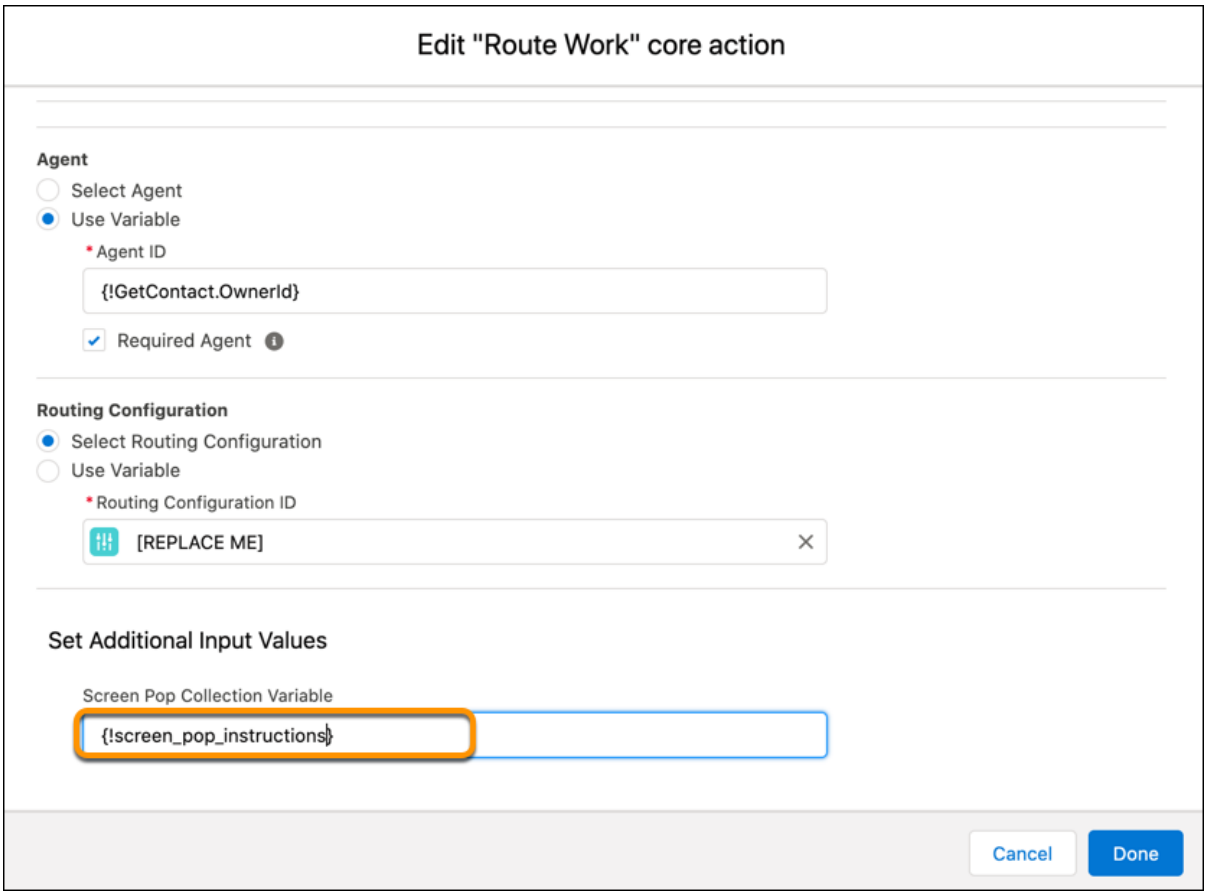
2. Use the variable to store the first Add Screen Pop action's output. Use the variable as input and output for all subsequent Add Screen Pop actions in the flow.
   a. Edit the Add Screen Pop action.
   b. To provide the screen pop instructions stored in the variable as input, under Set Input Variables, select this variable in the Set Collection Variable field.



c. To write the results of the Add Screen Pop action as output to the variable, expand Advanced, select **Manually assign variables**. Then select the variable in the Screen Pop Collection Variable field.



3. Pass the screen pop instructions from the variable to the Route Work action.
   a. Edit the Route Work action.
   b. In the Set Additional Input Values, select the variable in the Screen Pop Collection Variable field.



4. Save the flow.

Make Smarter Routing Decisions by Checking Agent Availability

Optimize routing by using information collected about your organization's capacity to handle new work requests. Add the Check Availability for Routing action to an Omni-Channel flow to determine agent availability and estimated wait time. This action can return the number of online agents and number of work items waiting to be picked up given the specified routing requirements, including routing type and parameters. It can also estimate how long the customer has to wait before they reach an agent. You can then build routing logic based on the results. For example, if the agent has more than five backlogged work items in their queue, you can route work to another queue instead.

Available in: Lightning Experience

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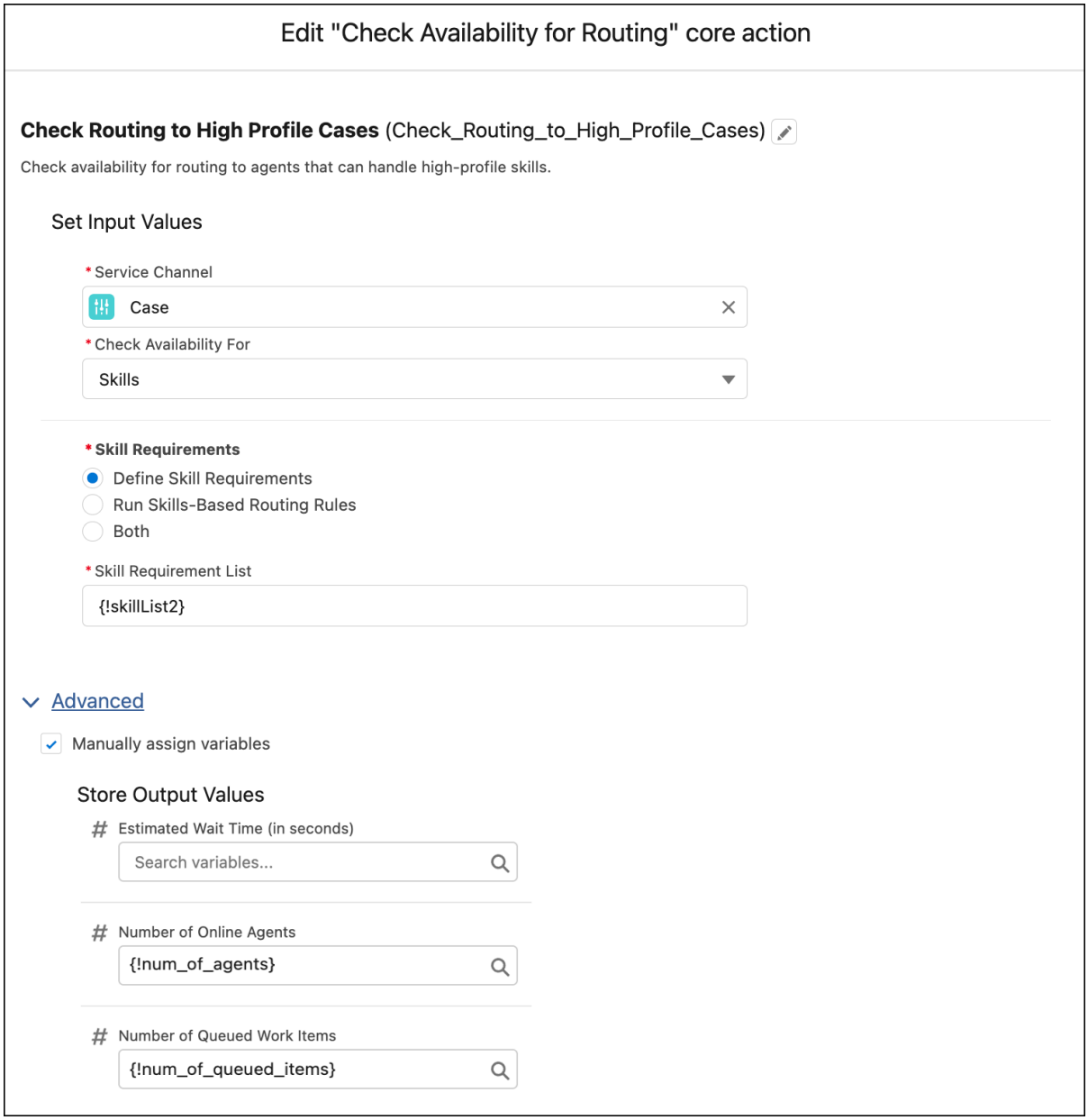
1. In the Omni-Channel flow, click **+**, and select **Check Availability for Routing**.
2. Give the action a label, API name, and, optionally, a description.
3. Select the service channel.
4. To check availability when you route to a queue, select **Queue**, and then select the queue or variable that stores the queue.
5. To check availability when you route to an agent, select **Agent**, and then select the agent or variable that stores the agent.

6. To check availability when you route to a skill, select **Skills**, and then select one of these options.
   - **Define Skill Requirements** to select requirements from an Add Skill Requirement flow action.
   - **Run Skills-Based Routing Rules** to select predefined skills-based rules. This option requires that you also select the recordId variable in the Record ID field, which stores the ID of the work record to be routed. Omni-Channel retrieves the rules assigned to the associated work record.
   - **Both** to use both options. This option requires that you also select the recordId variable in the Record ID field, which stores the ID of the work record to be routed. Omni-Channel retrieves the rules assigned to the associated work record.

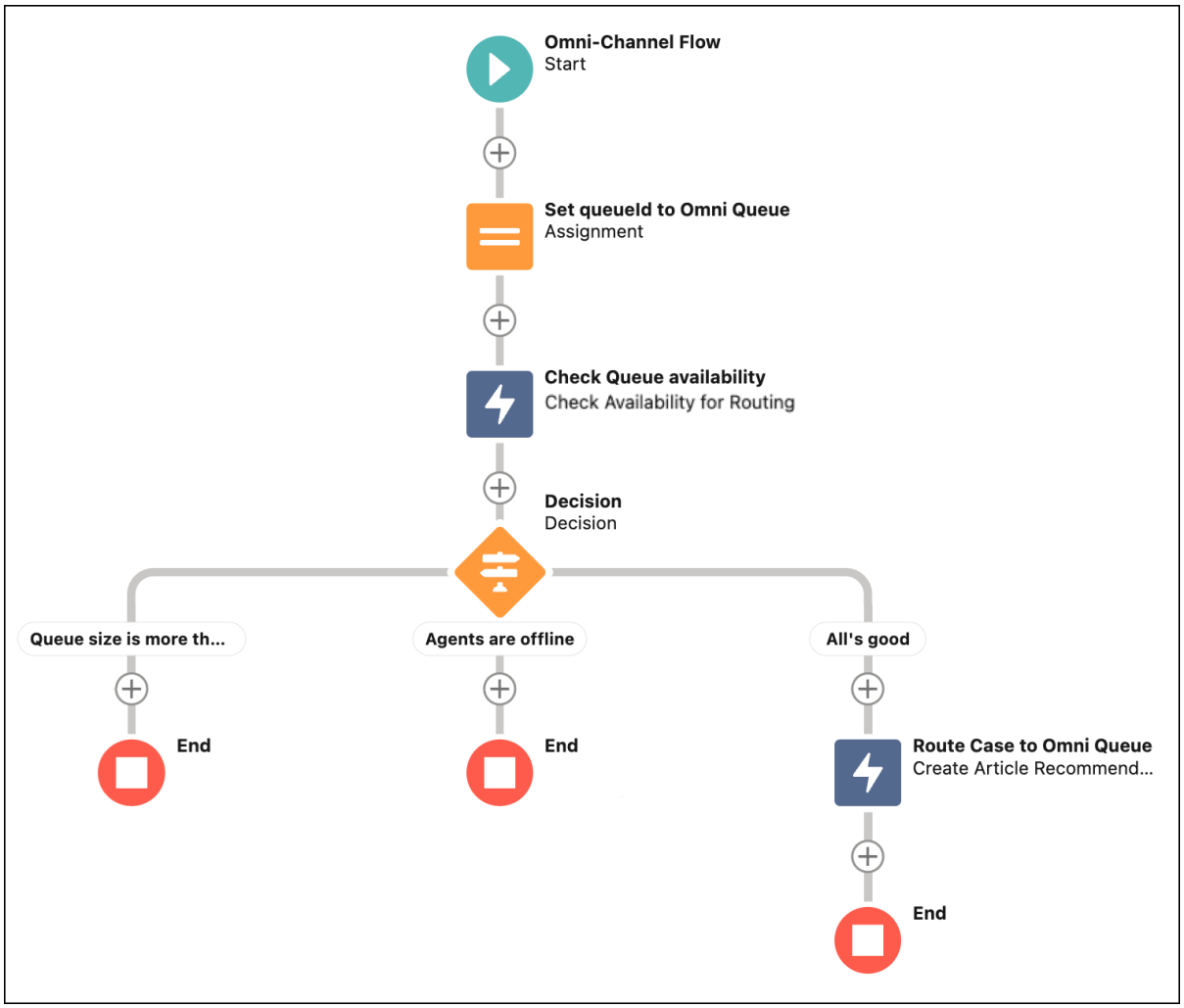
7. Optionally, to assign the output of this flow action to variables so they can also be used downstream in the Omni-Channel flow, expand the Advanced section, select **Manually assign variables**, and then select the variable for each output.

   The action can return these results.

Output	Description
Estimated Wait Time (in seconds)	The action returns the estimated wait time (in seconds) given the specified routing parameters. For example, if you route work to a queue, this parameter shows the estimated time that the work can remain in the queue before an agent picks it up. Note: Omni-Channel recalculates estimated wait time based on work routed during the last 10 minutes. If less than 10 items were routed, we can't calculate it.
Number of Online Agents	The action returns the number of agents who are online but not necessarily available to accept more work—they could be working at capacity. If you route to an agent, this value is 0 (the agent is offline) or 1 (the agent is online). If you route to a queue, this value is the number of online agents assigned to that queue. If you route to a skill, this value is the number of online agents who have the specified skillset.
Number of Queued Work Items	The action returns the number of items waiting to be picked up, which excludes items assigned to or accepted by agents. If you route to an agent, this value is the number of PSRs directly assigned to the agent without a fallback queue. If you route to a queue, this value is the number of PSRs assigned to the queue, including PSRs assigned to a specific agent with this queue as the fallback queue. If you route to skills, this value is the number of PSRs that share the exact same set of mandatory skill requirements, both skill and skill level, used in the action.



To make a routing decision based on the results of this action, add a Decision element to the Omni-Channel flow. In the Decision element, define the expected routing for different conditions. For instance, if at least one agent is online and the queue size is less than or equal to 10, route cases to the queue using a Route Work action.



To route work based on the estimated wait time, output the time in a Check Availability for Routing action of an Omni-Channel flow, and use that output as input for the routing logic in a Route Work action.

Route Work Items to Queues

Automatically route work to a specific queue using variables.

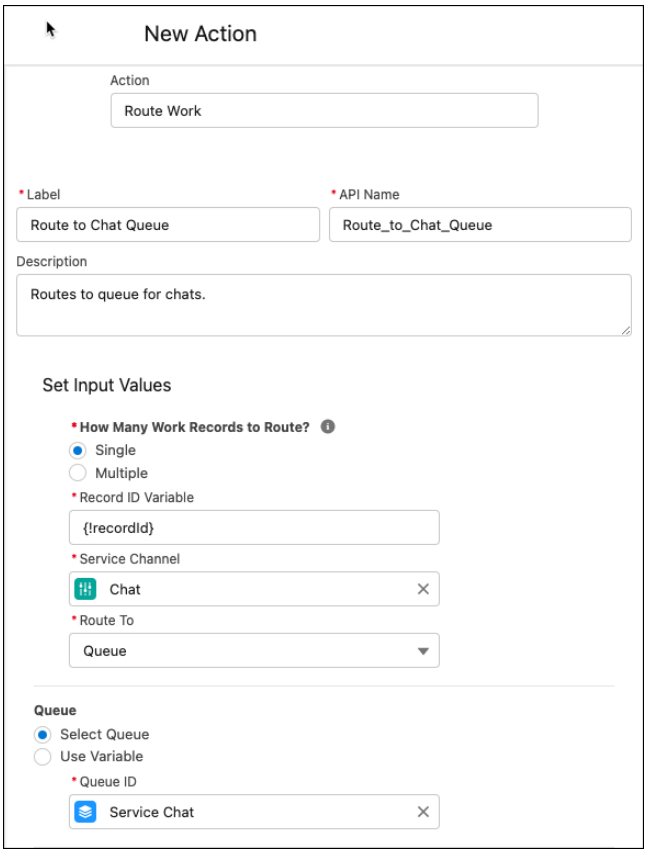
Available in: Lightning Experience
Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions with the Service Cloud

1. Follow the steps to create an Omni-Channel Flow.
2. Drag the **Route Work** action onto the canvas.
3. Give the action a label and API name and optionally, a description.
4. Under Set Input Values, select how many items to route work for.

To route one item, select **Single** and select a flow variable of type Text that contains the record ID to route work for. To route work for up to 100 items, select **Multiple** and provide a flow variable that's a collection variable of type Text with the list of record IDs to be routed.

If you specify a collection of records and the flow can't find one of them, it rolls back the changes and routes none of them.

5. Under Service Channel, select the channel.
6. Under Route To, select **Queue**.
7. Under Queue, select either of the following options:
   a. Select Queue—Specify the queue to route to.
   b. Use Variable—Use a variable to find the appropriate queue. For example, the variable can represent a department queue that's related to the customer's Contact record.



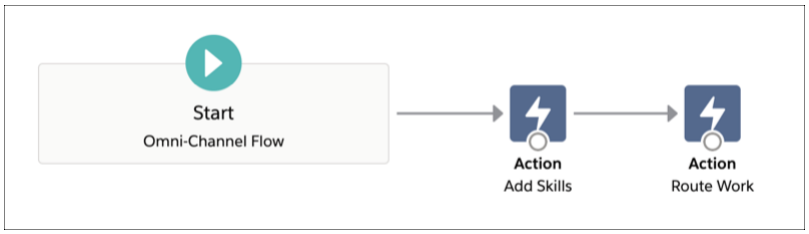
If the flow finds a record but can't route it to the specified queue for some reason, the record is routed to the fallback queue.

Route Work Items to Skills

Automatically route work items to qualified agents who have specific skills. In the Omni-Channel flow, attach the skill requirements to the work items.

Available in: Lightning Experience

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



Note: You can't use skills-based routing for voice calls.

Prerequisites to Route Work to Skills
Before you can route work items to skills using an Omni-Channel flow or skills-based routing rules, you must complete the prerequisites.

Add a Skill Requirement Action
Add skill requirements to your work items to ensure the work is routed to the best agent for the customer's issue. You can add up to 10 skills with the Add Skill Requirements action and can define 20 skills overall in the flow when routing an individual work item.

Add a Route Work Action
Route work items to agents with specific skills using an Omni-Channel flow.

Prerequisites to Route Work to Skills

Before you can route work items to skills using an Omni-Channel flow or skills-based routing rules, you must complete the prerequisites.

SEE ALSO:

Prepare to Route to Skills

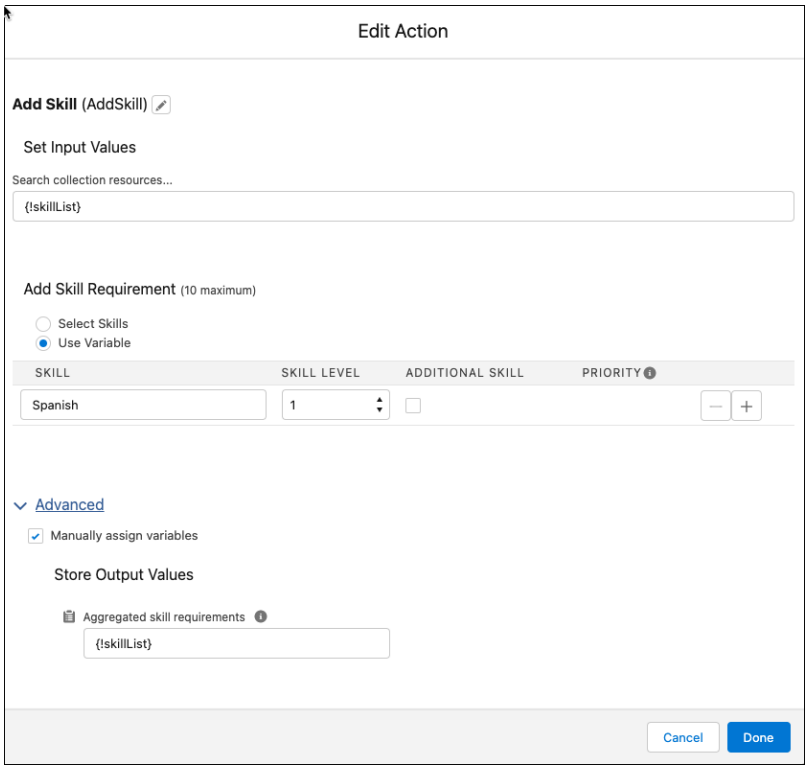
Add a Skill Requirement Action

Add skill requirements to your work items to ensure the work is routed to the best agent for the customer's issue. You can add up to 10 skills with the Add Skill Requirements action and can define 20 skills overall in the flow when routing an individual work item.

Available in: Lightning Experience

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

1. Follow the steps to create an Omni-Channel Flow.
2. Drag the Add Skill Requirements action onto the canvas.
3. Give the action a label and API name and optionally, a description.
4. Under Set Input Values, optionally select a skillList variable that you created. This variable stores and aggregates skills as the flow runs.
5. Under Add Skill Requirement, enter the skills or a variable with the Skill IDs that the agent needs. You can specify a skill level, whether the skill is additional, and a priority.
6. If you aggregate skills in a skillList variable as the flow runs, in the Advanced section, set that variable as output of the Add Skill Requirements action.



A subsequent Route Work action can use the output from your Add Skill Requirements action to define skills that agents need for work items. For example, if the API name of an Add Skill Requirements action is AddSkill, specify that action's outputs, {!AddSkill.skillRequirements}, in the Route Work action. If you aggregate skills in a skillList variable, specify it as output of your Add Skill Requirements action and as the skill requirements list in your Route Work action.

Add a Route Work Action

Route work items to agents with specific skills using an Omni-Channel flow.

Available in: Lightning Experience

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

Before you can route work using skills-based routing, enable the **Enable Skills-Based and Direct-to-Agent Routing** option in Omni-Channel Settings under Setup.

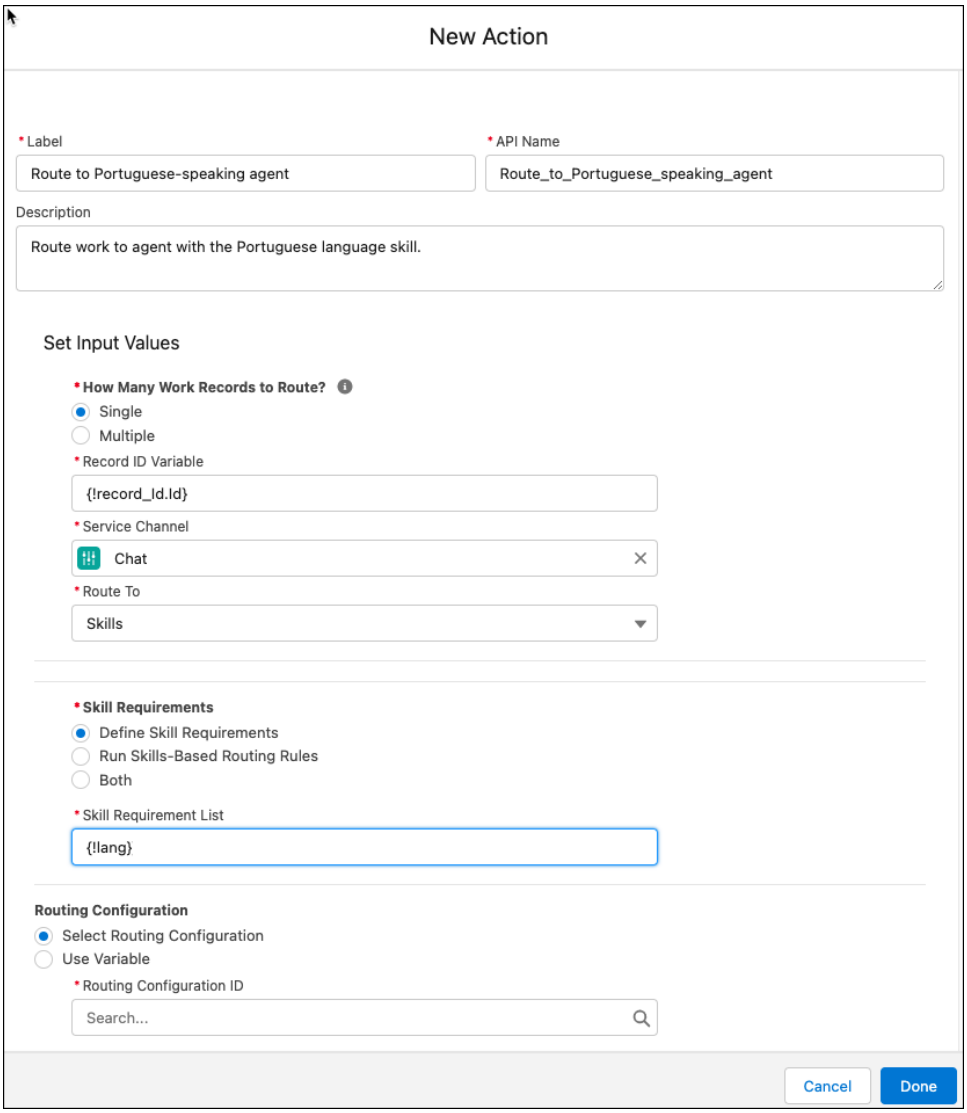
1. Drag the Route Work action onto the canvas.
2. Give the action a label and API name and optionally, a description.
3. Under Set Input Values, select how many items to route work for.

   To route one item, select **Single** and select a flow variable of type Text that contains the record ID to route work for. To route work for up to 100 items, select **Multiple** and provide a flow variable that's a collection variable of type Text with the list of record IDs to be routed.

   If you specify a collection of records and the flow can't find one of them, it rolls back the changes and routes none of them.

4. Under Service Channel, select the channel.
5. Under Route To, select **Skills**.
6. Under Skill Requirements, select one of the following options:
   a. Define Skill Requirements
   b. Run Skills-Based Routing Rules
   c. Both
7. If you define skill requirements in an Add Skill Requirements action in the flow, specify that action's output as the skill requirements list in the Route Work action.

   For example, if the API name of an Add Skill Requirements action is AddSkill, specify that action's outputs, {!AddSkill.skillRequirements}. Or if you use the skillList variable to aggregate skills, specify it as output in the Add Skill Requirements action and in the skill requirements list in the RouteWork action.
8. Under Routing Configuration, select either of the following options:
   a. Select Routing Configuration—Specify a routing configuration where the Use with Skills-Based Routing Rules option is disabled.
   b. Use Variable—Use a variable to find the appropriate skill list. For example, use a variable to determine the language skill associated with the customer's Contact record.



SEE ALSO:

Routing with Skills-Based Routing Rules

Route Work Items Directly to a Specific Agent

Automatically route work items directly to an agent using Direct-to-Agent routing.

Available in: Lightning Experience

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

To route all work items, except voice calls, in Omni-Channel Settings under Setup, verify that you've enabled **Enable Skills-Based and Direct-to-Agent Routing**. Without enabling this option, you can't route these types of work items to a specific agent.

Note: To route voice calls to a specific agent, don't select **Enable Skills-Based and Direct-to-Agent Routing**. This option isn't required.

1. Follow the steps to create an Omni-Channel Flow.
2. Drag the **Route Work** action onto the canvas.
3. Give the action a label and an API Name and, optionally, a description.
4. Under **Set Input Values** | **Record ID**, select the recordId variable you created.
5. Under **Route To**, select **Agent**.
6. Under Agent, select either of the following options:
   a. **Select Agent**—Specify the agent to route the work item to.
   b. **Use Variable**—Use a variable to find the appropriate agent. For example, you can determine the preferred agent associated with the customer's Contact record. In this example, we have a lookup field on the Contact record that defines a preferred agent for this contact. We pass in that Agent ID as a variable.
7. To assign work to the preferred agent when they become available, click **Required Agent**. Then specify the **Routing Configuration** to use for routing parameters.

   Note: Don't select **Required Agent** for voice calls. Assigning voice calls to preferred agents isn't supported.

8. Alternately, to route work to a queue when the preferred agent is unavailable, clear the **Required Agent** checkbox. Then specify the **Backup Queue** to route the work item to.

Route Work Items to an Enhanced Bot

Automatically route conversations to an enhanced bot using enhanced Messaging channels, based on your business criteria.

Enhanced Bots work only with enhanced channels, including Messaging for In-App and Web and enhanced third-party channels. To access enhanced channels, contact your Salesforce account executive.

Before you begin, create and activate an enhanced bot.

EDITIONS

Einstein Bots is available in Salesforce Classic and Lightning Experience. Setup for Einstein Bots is available in Lightning Experience.

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

1. Select an existing Omni-Channel flow to edit, or follow the steps to create an Omni-Channel flow from scratch on page 63.
2. Drag the Route Work action onto the canvas. Route Work actions are the last object in the flow.
3. Give the action a label and API name and optionally, a description.
4. Under Set Input Values, complete the required fields.
   - For the Record ID field, select the recordId variable on page 63 that you created.
   - For the Service Channel field, select **Messaging**.
   - For the Route To field, select **Bot** to populate the list of enhanced bots.
5. Under Bots, select your bot. Only active bots are available. If your bot doesn't appear in the list, activate your bot, refresh Flow Builder, and try again. If you deactivate your bot later, it's still associated with any flows that you added it to.
6. Under Queue, select a fallback queue where the Omni-Channel Flow sends the conversation if routing is unsuccessful.
7. Save your changes.

All Omni-Channel flows that route conversations to your bot appear in the Inbound Omni-Channel Flows section of the Bot Overview page.

SEE ALSO:

Set Up Enhanced Bots

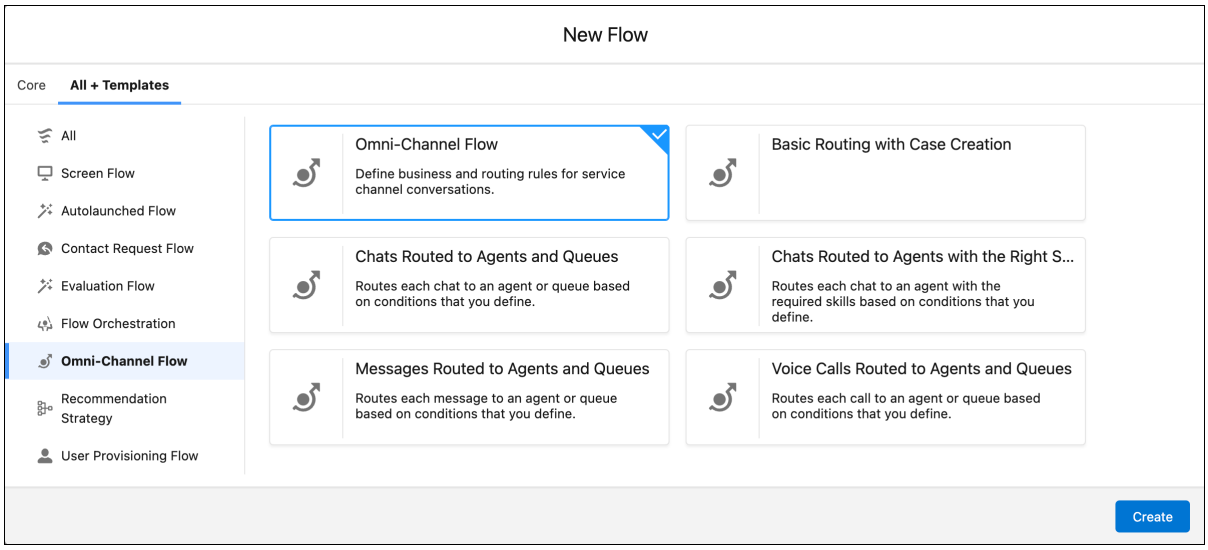
Create Cases for Inbound Calls with an Omni-Channel Flow Template

Save yourself time setting up this routing logic by using the Basic Routing with Case Creation template. This template identifies the caller, routes the call to a queue, creates a case for the call, and screen-pops the new case record when the agent accepts the call. If needed, modify the Omni-Channel flow to change the default routing behavior, such as the queue.

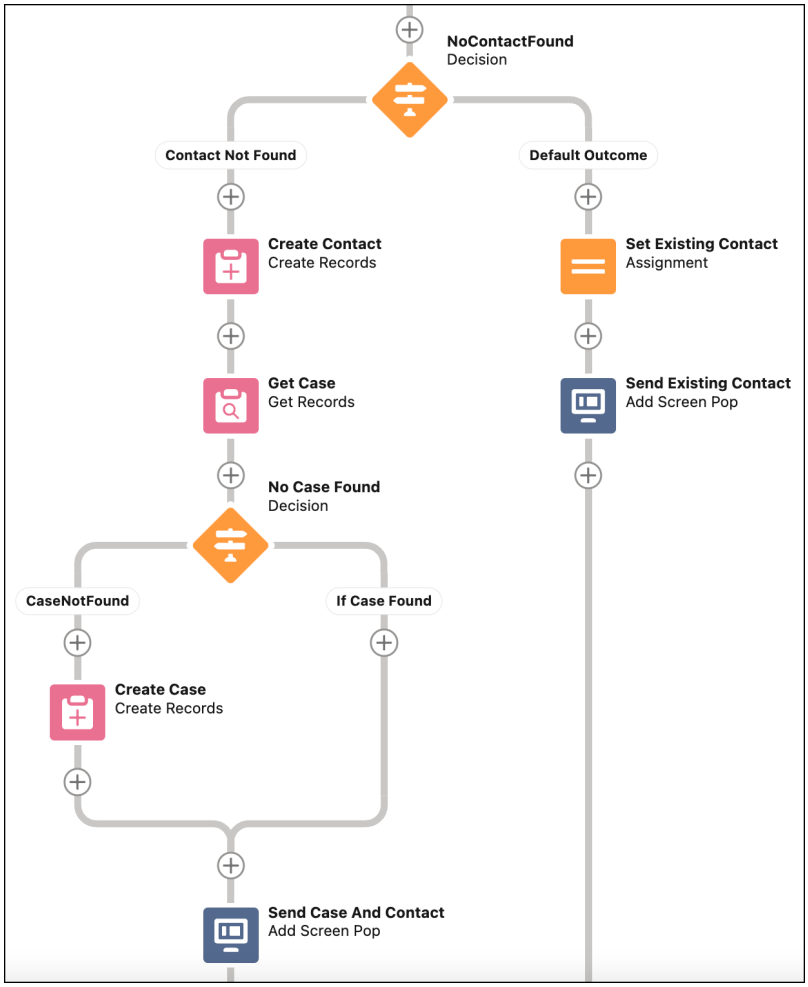
Available in: Lightning Experience

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

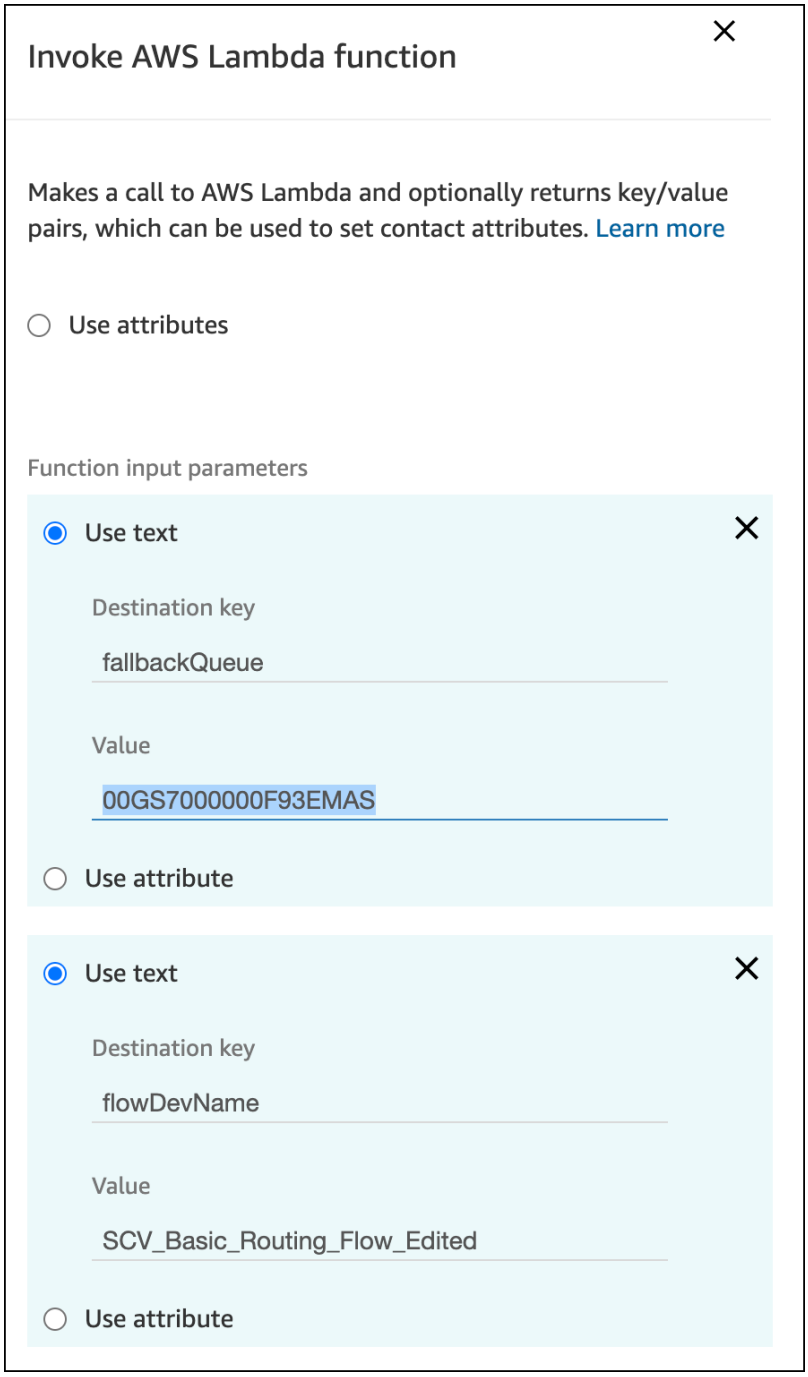
1. In the Quick Find box under Setup, enter *Flows*, and then select **Flows** under Process Automation.
2. Click **New Flow**.
3. Click **All + Templates**.
4. To filter the flow types to Omni-Channel flows, select **Omni-Channel Flow** in the left pane of the New Flow screen.



5. To create a flow from the Basic Routing with Case Creation template, select **Basic Routing with Case Creation**, and then click **Create**.



6. Save the Omni-Channel flow.
7. Open the associated Sample SCV Basic Routing with Case Creation contact flow in Amazon Connect.
8. Double click the Invoke AWS Lambda function block, and add the `flowDevName` and `fallbackQueue` input parameters.
9. In `flowDevName`, specify the developer name of the Omni-Channel flow. In `fallbackQueue`, specify the developer name or ID of the fallback queue.



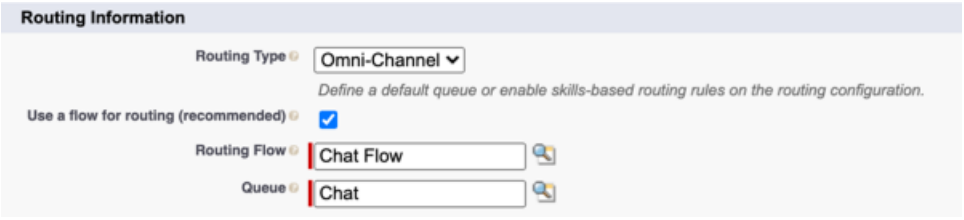
10. Save the change to the Lambda function.

Assign an Omni-Channel Flow to a Chat Button

Route chats to the best agent dynamically using the Omni-Channel routing type and Omni-Channel flows.

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

1. From Setup in the Quick Find box, enter `Chat Buttons & Invitations`, and then select **Chat Buttons & Invitations**.
2. Edit an existing button or create one.
3. In the Routing Information section, for **Routing Type**, select **Omni-Channel**.
4. Select **Use a flow for routing**.
5. For **Routing Flow**, specify the flow you created to route chats.
6. For **Queue**, select a queue for this chat button. If you aren't using a routing flow, the queue manages and prioritizes chats. If you're using a routing flow, the queue determines chat button availability. If the agents assigned to the queue are online and have capacity, the button is available.



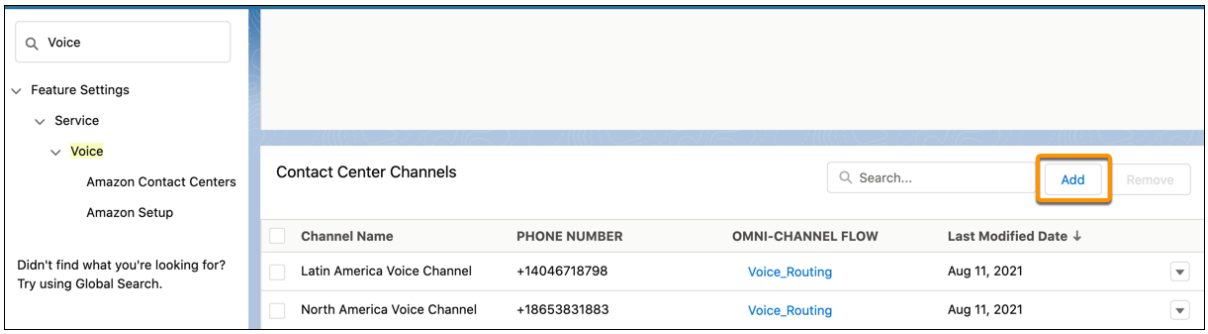
Assign an Omni-Channel Flow to a Phone Channel

Your contact center can have multiple phone channels that your customers can call, such one for Support and another for Sales. Each channel has its own phone number. To route calls in a phone channel, create the channel in the contact center and then specify the routing method for the channel. To dynamically route calls with an Omni-Channel flow, assign the flow to the channel.

Available in: Lightning Experience

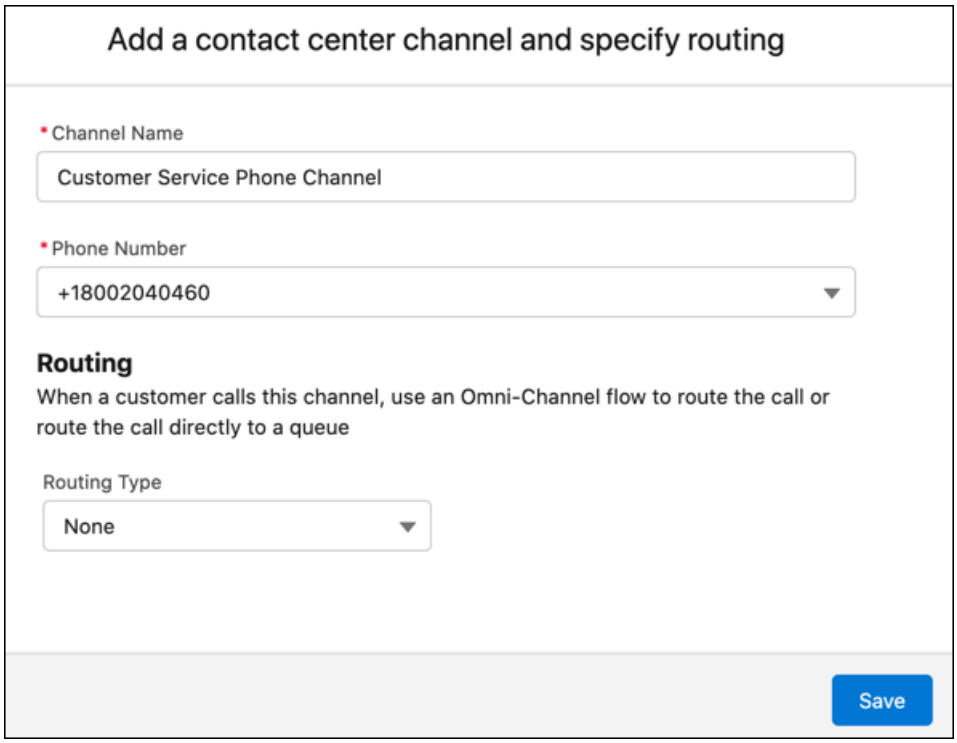
Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions with the Service Cloud

1. From Setup in the Quick Find box, enter *`Voice`*, and then select **Amazon Contact Centers** or **Partner Telephony Contact Centers**, depending on your telephony system.
2. Click the contact center.
3. Under Contact Center Channels, click **Add** to add a phone channel. You can also edit an existing channel.



4. Enter the channel properties.

Property	Description
Channel Name	The name of the phone channel.
Phone Number	The phone number that customers call to contact you on this channel.
Routing Type	• To route calls to a queue, select **Queue**, and then select the queue. • To dynamically route calls using an Omni-Channel flow, select **Omni-Channel Flow**, and then select the flow and fallback queue. If the flow fails to route the call, the call is routed to the fallback queue. • To not specify a routing method for the contact center channel, select **None**. You might also choose this option to route calls using the Execute OmniFlow API. If no routing instructions are provided, the calls to this channel fail.



5. Click **Save**.

Assign an Omni-Channel Flow to Route Cases from Email-to-Case

Route cases from your customer support emails to qualified agents with an Omni-Channel flow.

Available in: Lightning Experience

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

USER PERMISSIONS

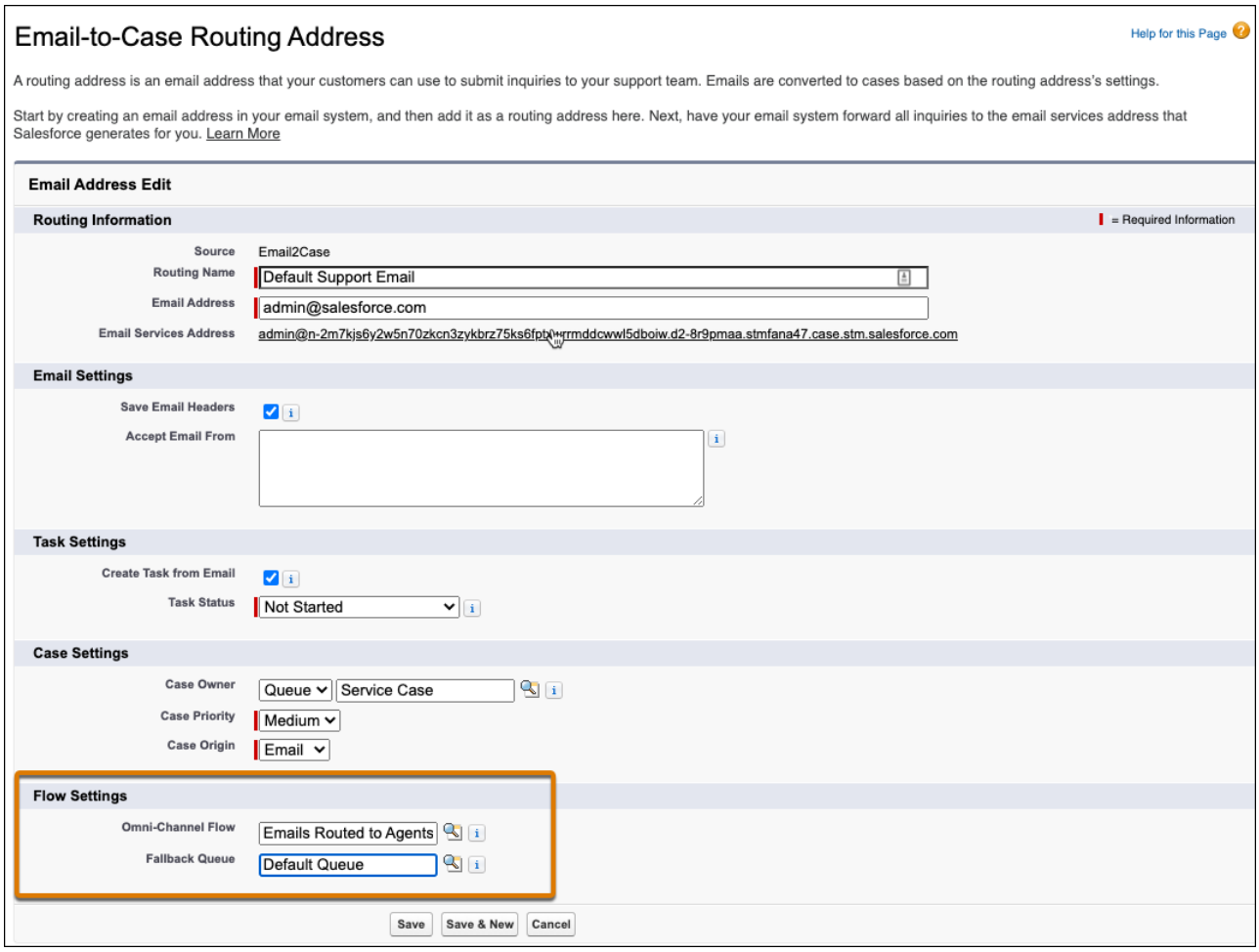
To assign an Omni-Channel flow to route cases
- Customize Application

If you use Email-to-Case, use an Omni-Channel flow rather than a record-triggered flow to direct cases to the right queue or agent. Avoid using other case assignment rules so that Email-to-Case routes cases using the logic in your Omni-Channel flow.

1. Assign the Run Flows or Manage Flows permission to the automated case user. This user is defined in Setup under Support Settings.
2. From Setup, in the Quick Find box, enter *Email-to-Case*, and then select **Email-to-Case**.
3. Create or edit the routing address that your customers use to submit inquiries to your support team.

   For the Omni-Channel flow to be used for routing, this address must be verified.
4. In the Flow Settings section, specify the flow that you created to route your cases.
5. Specify a fallback queue.

   The fallback queue must use Case as the service channel object and have an Omni-Channel routing configuration. If the flow can't otherwise determine how to route a case, this queue is used.



6. Click **Save**.

When a customer sends an email to your routing address, Email-to-Case creates a case if one doesn't exist. The flow then executes and directs the case to the appropriate Omni-Channel queue or agent.

Invoke an Omni-Channel Flow to Route Non-Real-Time Objects

To route non-real-time objects, such as cases, leads, and custom objects, define the routing logic in an Omni-Channel flow, and then invoke the flow from a parent flow based on your business rules. For example, to trigger the flow to run when cases are created, add it as a subflow in a record-triggered flow. Or, to perform a custom transfer process, add it as a subflow in a screen flow.

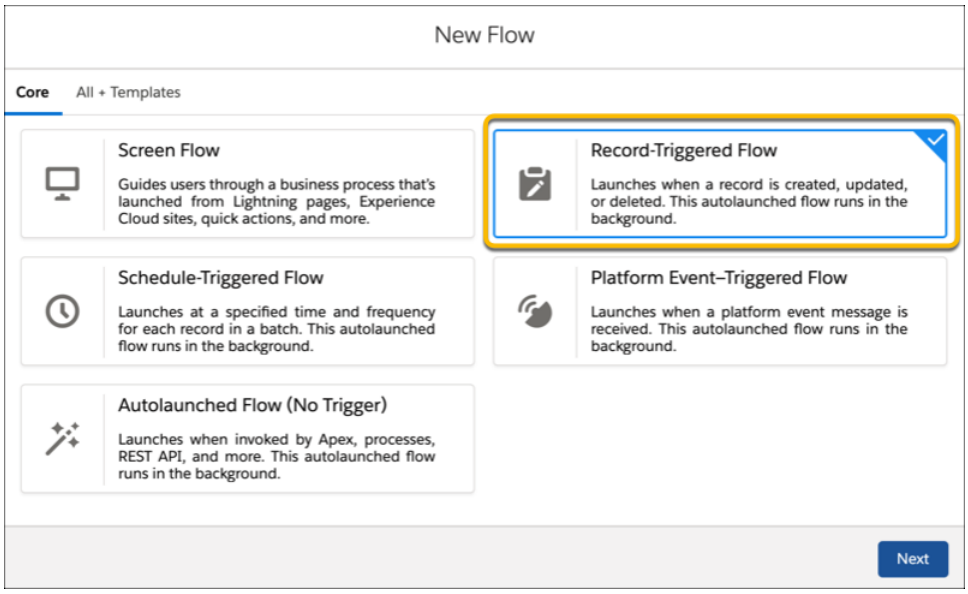
Available in: Lightning Experience

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

To show you one method for invoking an Omni-Channel flow for a non-real-time object, let's look at how to use a record-triggered flow to invoke an Omni-Channel flow to route cases. To route cases in Email-to-Case, use an Omni-Channel flow instead of a record-triggered flow.

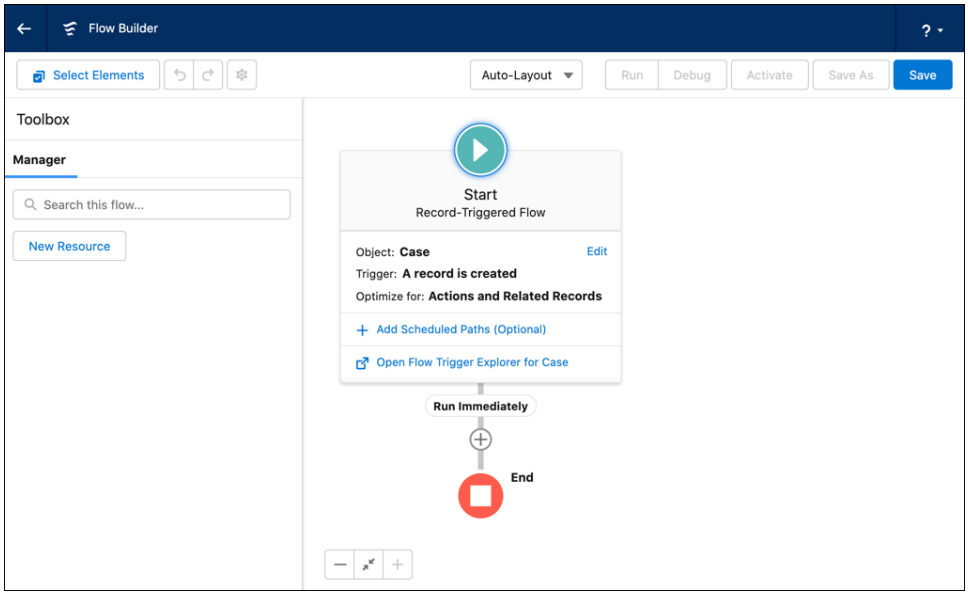
1. In the Quick Find box under Setup, enter `Flows`, and then select **Flows** under Process Automation.

2. Click **New Flow**.



3. Click **Record-Triggered Flow**, and then click **Create**.
4. In Object, select the non-real-time object. For example, to route cases, enter `Case` and select it.
5. In Trigger the Flow When, select when to trigger the subflow. For example, to route the case when it's created, select **A record is created**.
6. Click **Done**.

   The record-triggered flow appears in the Flow Builder canvas.

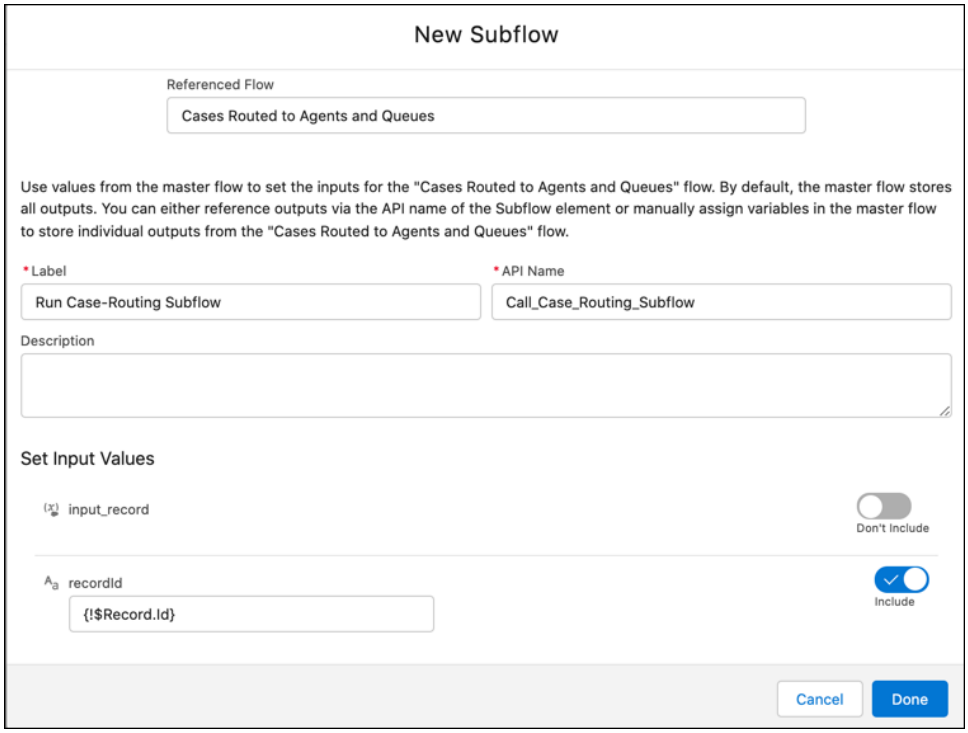


7. Add a Subflow element to the flow by dragging the Subflow element from the Elements toolbox or clicking **+** in the flow.

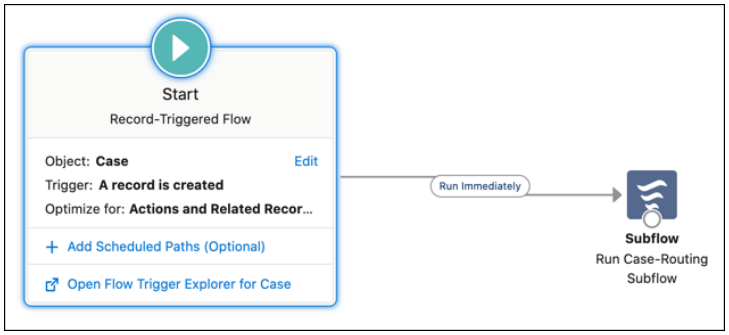
8. In the New Subflow window, select the Omni-Channel flow.

   Tip: To prevent a warning from appearing when you save the record-triggered flow, activate the Omni-Channel flow before adding it as a subflow.

9. Enter the label and API name for the subflow element.
10. In Select Input Values, select the case record ID in the recordId field.



11. Click **Done**.
12. To connect the elements in the flow, drag the Start element onto the Subflow element.



13. Save the record-triggered flow.

Considerations and Limitations

Consider these Omni-Channel flow limitations.

- With Email-to-Case, use an Omni-Channel flow for case routing instead of a record-triggered flow.
- Omni-Channel Flow for Chat is not available for Einstein Bots.

- Chat button availability (when the button shows as online) is defined by the queue associated with the Chat button. To manage button availability, consider setting up a parent queue for the Chat button that includes a high-level grouping of agents.
- If you're using dynamic routing to queues or skills, make sure that there are agents online in those queues, and that the queue size is set appropriately.
- Debug logs are not created when the Route Work action is invoked.

Routing with Skills-Based Routing Rules

Create skills-based routing rules to define when to require specific skills when routing work to agents. For example, define a rule that routes calls about product returns to an agent who knows how to process returns.

Before you create skills–based routing rules, complete all skills-based routing prerequisites.

Skills-based routing rules support case, chat transcript, contact request, lead, messaging session, order, social post, and custom objects.

A queue's membership no longer applies to routing if the queue is assigned a routing configuration that's enabled with skills-based routing rules. Work is routed to available agents with the right skills. If skills-mapping criteria aren't met and no skills are assigned to a work item, the work is routed to any available agent.

Enable Skills-Based Routing Rules from the Routing Configuration

The routing configuration that is used by the queue through which the work item is routed must be enabled to use skills-based routing rules.

Map Work-Item Field Values to Skills

To use skills-based routing rules to route work to agents with specific skills, define the mappings between work-item field values and skills. For example, to route product-return calls to the right agents, map the case type field value, Product Return, to the Returns Processing skill.

SEE ALSO:

Create Skills for Skills-Based Routing

Create Service Resources for Agents

Assign Skills to Service Resources

Enable Skills-Based Routing Rules from the Routing Configuration

The routing configuration that is used by the queue through which the work item is routed must be enabled to use skills-based routing rules.

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Omni-Channel:
- Customize Application

1. Locate the routing configuration associated with the queue.
   a. From Setup, enter *Queues* in the Quick Find box, then select **Queues**.
   b. Edit the queue and locate the routing configuration name in the **Configuration with Omni-Channel Routing** section.
2. From Setup, enter *Routing* in the Quick Find box, then select **Routing Configurations**.

3. Edit the routing configuration that is used by the queue through which the work item is routed.
4. Select **Use with Skills-Based Routing Rules**.

5. Use the **Drop Additional Skills Time-Out** to specify the amount of time to wait for an agent with a skill marked as additional to become available before the skill is dropped from Omni-Channel routing. The work item is then routed to the best-matched agent even if they don't have all the skills.
6. Optionally, add skills to the routing configuration.

   To route work to the right agent, Omni-Channel applies a combination of the skills from these two sources.

   Static skills included in the routing configuration
   To add skills to every work item that's routed using that routing configuration, add the skills to a routing configuration.

   Dynamic skills added from an Omni-Channel flow or skills-based routing rules
   To dynamically add skills to specific work items based on conditions, build the logic using an Omni-Channel flow or skills-based routing rules. If the conditions are met, the skills are applied to the work item.

Map Work-Item Field Values to Skills

To use skills-based routing rules to route work to agents with specific skills, define the mappings between work-item field values and skills. For example, to route product-return calls to the right agents, map the case type field value, Product Return, to the Returns Processing skill.

Available in: Lightning Experience

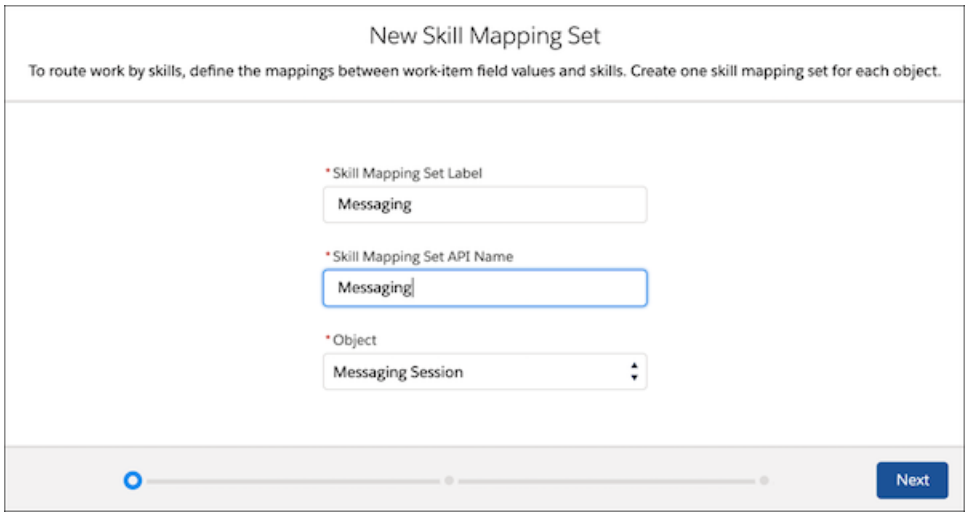
Available in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

USER PERMISSIONS

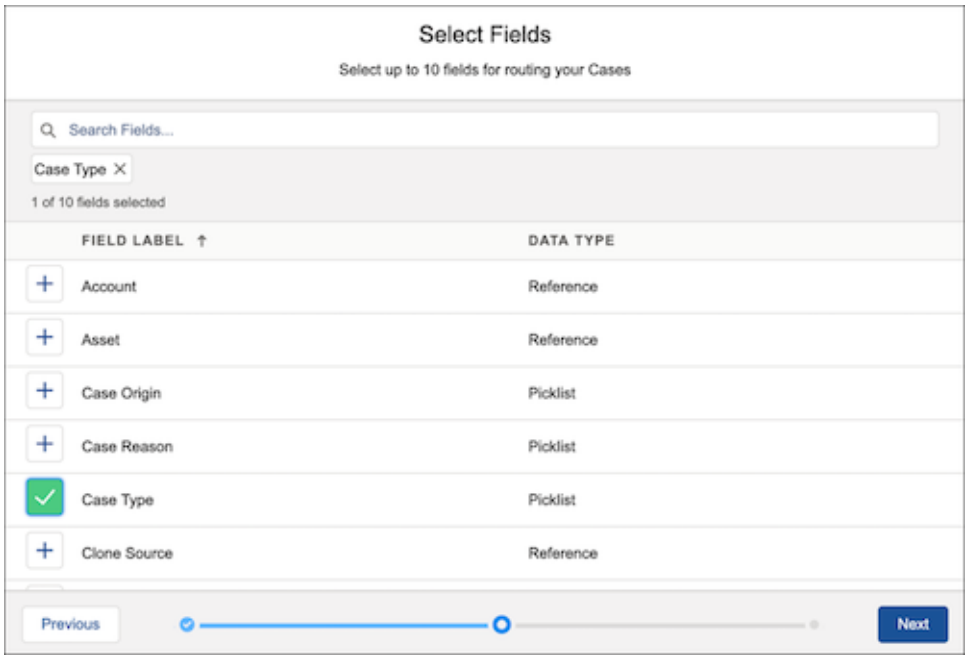
To set up Omni-Channel:
- Customize Application

Create one skill mapping set for each object. In each mapping, associate an object's picklist, boolean, and lookup field values with the skills needed to route a work item to the right agent. You can map up to 10 fields and 100 field values. You can also specify the skill levels. To route a work item more quickly, specify whether a skill is additional and can be dropped if needed.

1. From Setup, enter *`Skills-Based Routing Rules`* in the Quick Find box, then select **Skills-Based Routing Rules**.
2. Click **New Skill Mapping Set**.
3. Provide a name and developer name for the mapping set and select the type of object to be routed. Then click **Next**.



4. Select the fields for routing your cases. Then click **Next**.



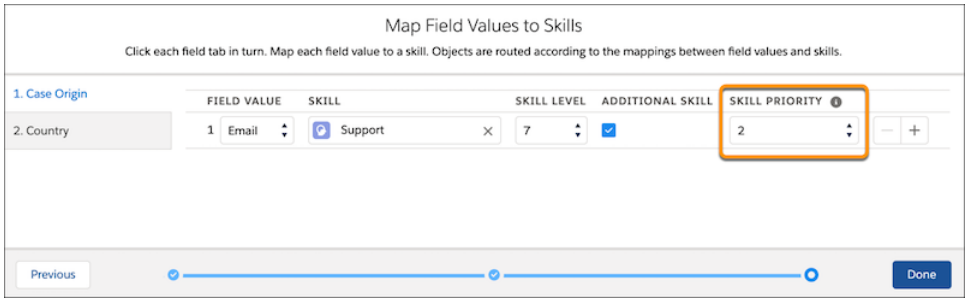
You can map standard and custom field values of type picklist, boolean, and lookup.

Note: You can use any method to set custom field values on objects. For example, pre-chat forms, triggers, and custom apex code.

5. For each field, select the field value and corresponding skill. You can also specify a skill level and set skills to additional. For additional skills, you can specify the order in which skills are dropped if after the specified timeout no agent with that skill is available.

   Initially, Omni-Channel tries to route a work item to an agent with all the requested skills. If an agent with all the skills isn't available and additional fields are configured to be dropped, Omni-Channel drops skills. It drops skills with the same priority value until an agent with the remaining skills is available. Higher priority-value skills are dropped first. Lower priority-value skills, for example 0, or

skills without a priority are dropped last. The work item is then routed to the best-matched agent, even if the agent doesn't have all the additional skills.



For example, you can set up the following required and additional skills:

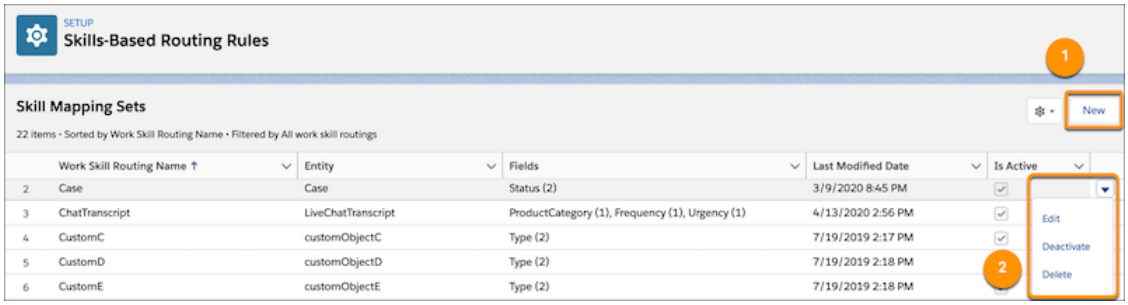
- Language: English and French are required, not additional.
- Issue Type: Software and Hardware are additional skills of the highest priority, 0.
- Product: Speaker, Mouse, and Keyboard are additional skills of priority 1.
- Location: USA, England, Canada, and France are additional skills of priority 2.

In this example, Language skills aren't additional, so they're never dropped. Skills associated with the Issue Type field are the highest priority, so Omni-Channel drops them last. Skills associated with the Location field are dropped first.

Note: Skills with the same priority value resulting from the skill-based routing rules setup method or Apex code belong to the same group and are dropped together.

6. When you have mapped field values to skills for each field, click **Done**.

   To create a mapping set, click **New** (1). To edit or delete a mapping set, use the dropdown menu (2). To stop routing for an object, click **Deactivate**. To start routing for an object, click **Activate**.



To test the routing setup, navigate to your console app and bring the agent with the right skill online. Create a work item with the field value that maps to the corresponding skill. Change the owner of the work item to a queue with the routing configuration that you set up for skills-based Routing rules. The work item appears in the Omni-Channel widget. Routed work appears in the Queues Backlog and Skills Backlog in Omni-Channel Supervisor.

External Routing

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: Lightning Experience

Available in: **Professional**, **Enterprise**, **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.

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: both Salesforce Classic (not available in all orgs) and 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.

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