

A step-by-step declarative guide to automating Service Cloud work routing in 45 minutes.

Stop letting agents cherry-pick easy Salesforce cases. Set up Omni-Channel routing to force automated, capacity-based work delivery.

1 The 3 Pillars of Omni-Channel Routing

Omni-Channel acts as a smart dispatcher pushing work directly to available agents. Understand these three foundational elements before touching your Setup menu:

- ✦ **Service Channels:** Maps Salesforce objects (Cases, Leads, custom objects) to the routing engine.
- ✦ **Routing Configurations:** Controls priority, capacity allocation, and the agent assignment model.
- ✦ **Presence Statuses:** Controls agent states (Available, Busy, Break) and their active channels.

2 Steps 1 & 2: Enable & Map Your Objects

Lay down your technical foundation. Always validate these configurations in a sandbox before deploying them to production.

- ✦ **Step 1:** Go to Setup -> Omni-Channel Settings. Check 'Enable Omni-Channel' and save.
- ✦ **Warning:** This is a one-way switch. It cannot be disabled after enabling.
- ✦ **Step 2:** Go to Setup -> Service Channels -> Click New.
- ✦ Map your target object (e.g., Case) to define it as a routable channel.
- ✦ **Tip:** Check 'Minimize Utility Bar' to keep your agents' console workspace clean.

3 Step 3: Define Routing Configurations

Routing Configurations dictate how work is prioritized and divided among agents when arriving in queues.

- ✦ **Priority:** Lower integers route first (e.g., Priority 1 queues override Priority 2).
- ✦ **Capacity Model:** Choose between Capacity Percentage or exact Capacity Units per work item.
- ✦ **Routing Model:** Select Least Active Agent, Most Available Agent, or External Routing.
- ✦ **Setup Path:** Navigate to Setup -> Routing Configurations -> click New to configure.