

CHEATSHEET

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

Omni-Channel in Service Cloud: Setup Guide and Performance Tips

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

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.

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.

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.

THAT'S A WRAP

Complete Your Setup and Tuning

Ready to tie your routing configurations to Queues, build Presence Statuses, and learn how to optimize throughput?

Read our full step-by-step setup guide.

→ salesforcelwc.com

5 slides

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