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## About the Author

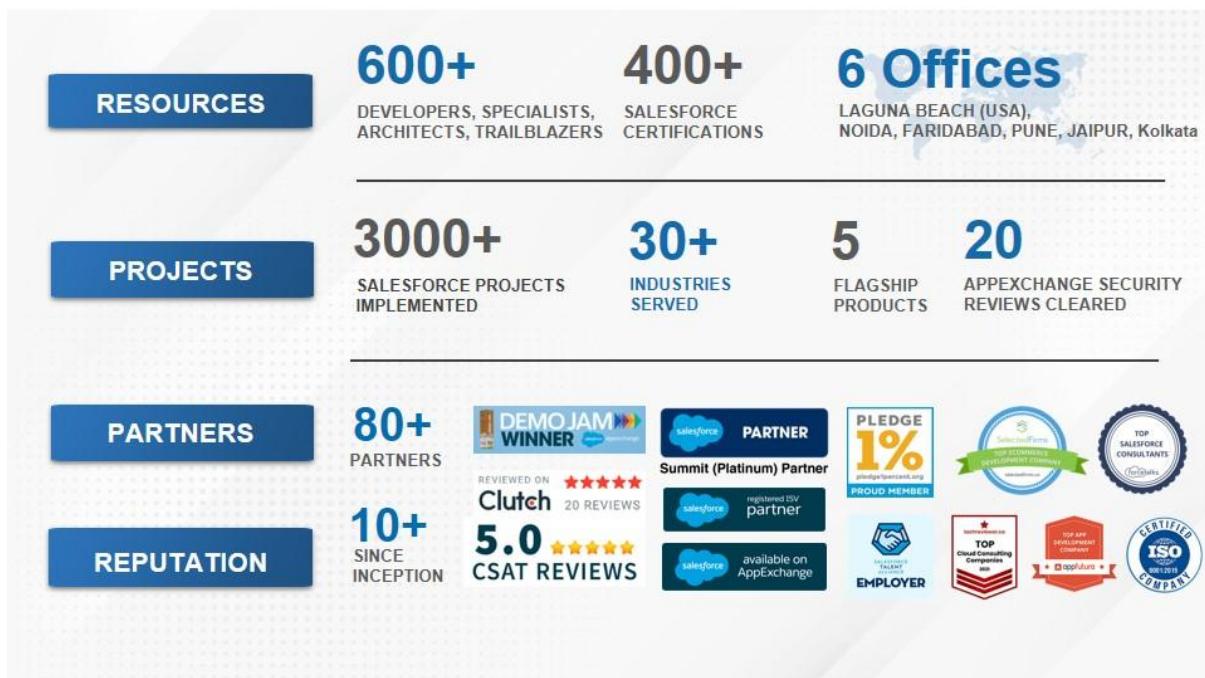


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# About Us



## How to Enable Omni-Channel in Salesforce?

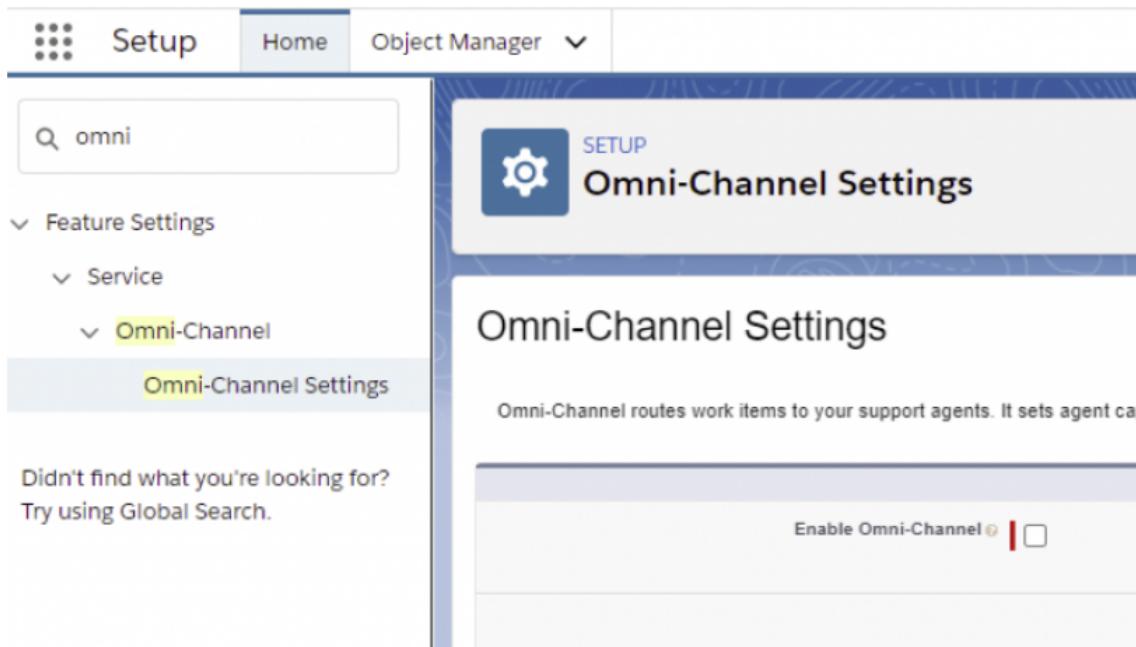
The feature of Omni-Channel sounds pretty awesome, doesn't it? But how do you actually set it up in Service Cloud? Let's walk through the steps involved in the basic Omni-Channel setup.

### 1. Enable Omni-Channel

To turn on the feature, go to Setup > Feature Settings > Service > Omni-Channel > Omni-Channel Settings.

You can also do so by going to Service Setup > Administration > Omni-Channel > Omni-Channel Settings. You can also simply type "Omni-Channel" in Setup Quick Search.

You'll see the box Enable Omni-Channel. Check it and click Save.



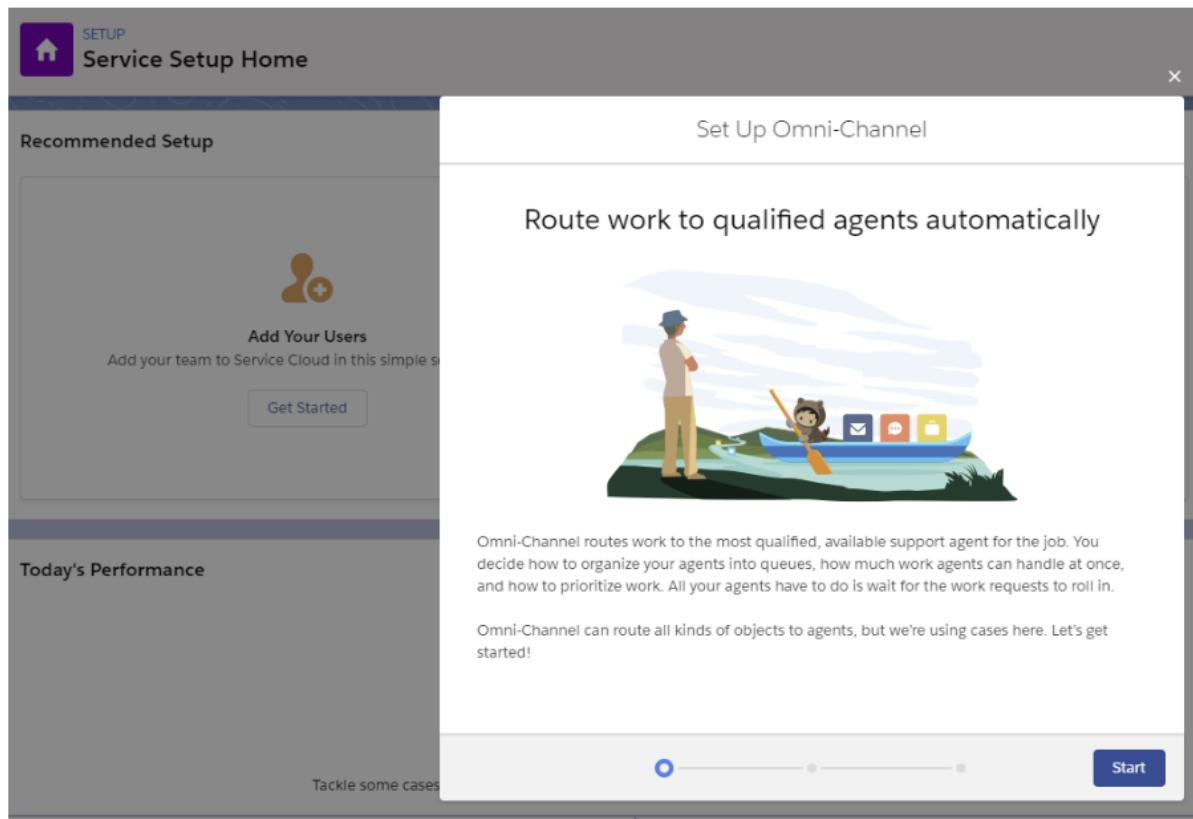
## 2. Omni-Channel Routing

The most important thing for which Omni-Channel is used is routing. With Omni-Channel, there are three routing options — Queue Based, Skill Based, and External.

We've provided here a quick setup guide for Queue-Based and Skill-Based Routing. External Routing setup can go slightly differently depending on the third-party app you're using.

### Queue-Based Routing

Queue-based routing is pretty straightforward, and Salesforce even has a simple setup flow to start the process. Go to the Omni-Channel Setup Flow in Service Setup.



In the setup flow, create a queue and assign specific agents to that queue. You can leave the Agent Workload settings as the default.

### Set Up Omni-Channel

#### Create a queue

A queue holds incoming cases until they're routed to the right person on your team.

Queue Name	Name These Agents
High-Priority Cases	High_Priority_Cases

Service Cloud Licenses  
2 of 2 in use (0 new)

Search People...

2 items selected

Full Name	Title	Phone	Email
Rachel Garton			rachel.garton@internetcreations.com

## Skill-Based Routing

Skill-based routing is capable of handling more complicated customer service needs. But it is also more complicated to configure.

- **Step 1**

Check the box to Enable Skill-Based Routing in Omni-Channel Settings.

## Omni-Channel Settings

Omni-Channel routes work items to your support agents. It sets age



- **Step 2**

Then you have to configure skills for your agents. For example, let's use "Programming" and "Mechanical" skills for a random gadget company.

Go to Omni-Channel > Skills in setup. Then click New and create basic skills. You don't have to worry about assigning users yet.

## Skills

Use skills to track the expertise of agents, field service technicians, and other staff. For Chat, assign skills to



A screenshot of a software interface for creating a new skill. The interface is divided into tabs: 'Basic Information' (selected), 'Assign Users', and 'Advanced Options'. In the 'Basic Information' tab, there are three input fields: 'Name' (containing 'Mechanical'), 'Developer Name' (containing 'Mechanical'), and 'Description' (empty). At the top right of the form are 'Save' and 'Cancel' buttons.

- Step 3

Next, you'll create Service Resources to link agents (users) to skills.

You must find the Service Resources object in the App Launcher and create New. Then Active service resources for your agents.

New Service Resource

Information

* Name	Rachel Garton	Active	<input checked="" type="checkbox"/>
User	Rachel Garton	Include in Scheduling Optimization	<input type="checkbox"/>
* Resource Type	Agent		
Capacity-Based	<input checked="" type="checkbox"/>		
Description			

Cancel Save & New Save

Now add the skills to the resources in the Skills-related list.

New Service Resource Skill

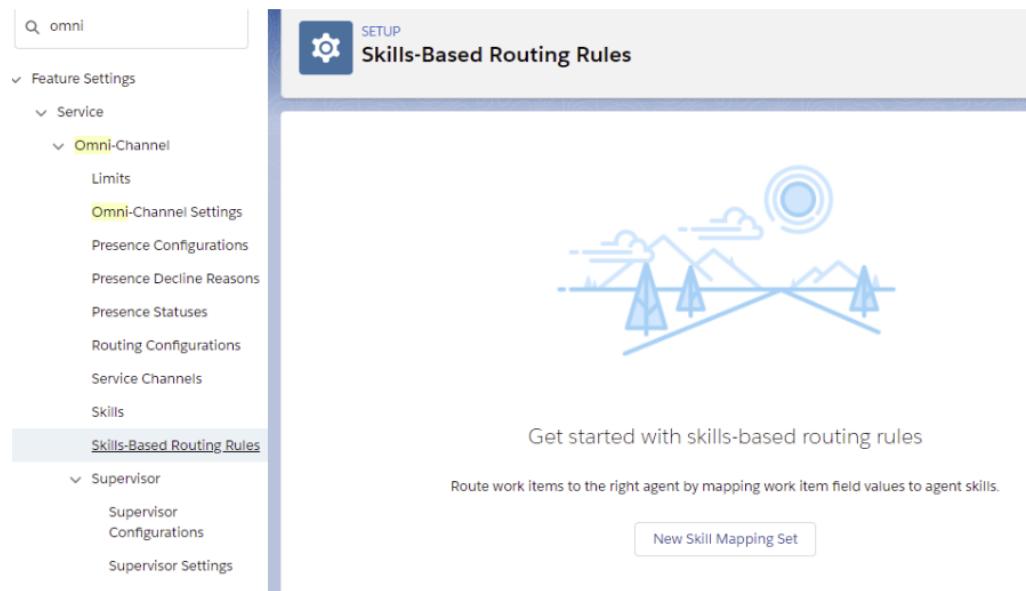
Information

* Service Resource	Rachel Garton	X
* Skill	Mechanical	X

- Step 4

Now you have to tell Omni-Channel how to use the skills for routing the work.

Go to Skills-Based Routing Rules in Setup and select the New Skill Mapping Set button.



Create the skill mappings for defining field values to align with specific field requirements.

For example, cases with a Case Type of Mechanical will be aligned with the Mechanical Skill.

**Map Field Values to Skills**

Click each field tab in turn. Map each field value to a skill. Objects are routed according to the mappings between field values and skills.

1. Case Type	FIELD VALUE	SKILL	SKILL LEVEL	ADDITIONAL SKILLS
	1 Mechanical	Mechanical	X	1

Lastly, you just have to ensure any existing Routing Configurations are enabled for using the necessary skills.

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### Skills-Based Routing Rules

Use Skills-Based Routing for this routing configuration and optionally add default skills. Skills-Based Routing Rules add skills to any default skills.

Use with Skills-Based Routing Rules

Drop Additional Skills Time-Out (seconds)

Skills	Available Skills	Selected Skills
		Mechanical Programming
	Add  Remove 	

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 **AppExchange Apps**

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- ❖ WhatsApp Messaging
- ❖ CTI (Calls)
- ❖ Ringless Voicemail
- ❖ Facebook Messenger
- ❖ Automated Texting
- ❖ 1-on-1 Conversation
- ❖ Link Tracking
- ❖ Bulk Texting & Scheduling
- ❖ Intelligent Texting (itext)

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# Thank You



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