

Common Service Cloud Channel Flows

This package includes several Flows that will help you get started with your Service Cloud setup, automating various processes that will speed up your implementation and increase productivity. They are designed to be guides that you can update and change to suit your use cases as appropriate.

The package can be installed here: [AppExchange Listing URL](#)

Demo video: <https://vimeo.com/715726031>

Prerequisites

Licensing

- Service Cloud
- Service Cloud Voice (apologies - I didn't think this license was required in the org to install this package, but appears that it is (as it's now available in Developer orgs). [Here is a link to install this an unmanaged version of this package](#) without the Voice Call Flow.

To install this package you will have to enable these 2 features in Service Cloud:

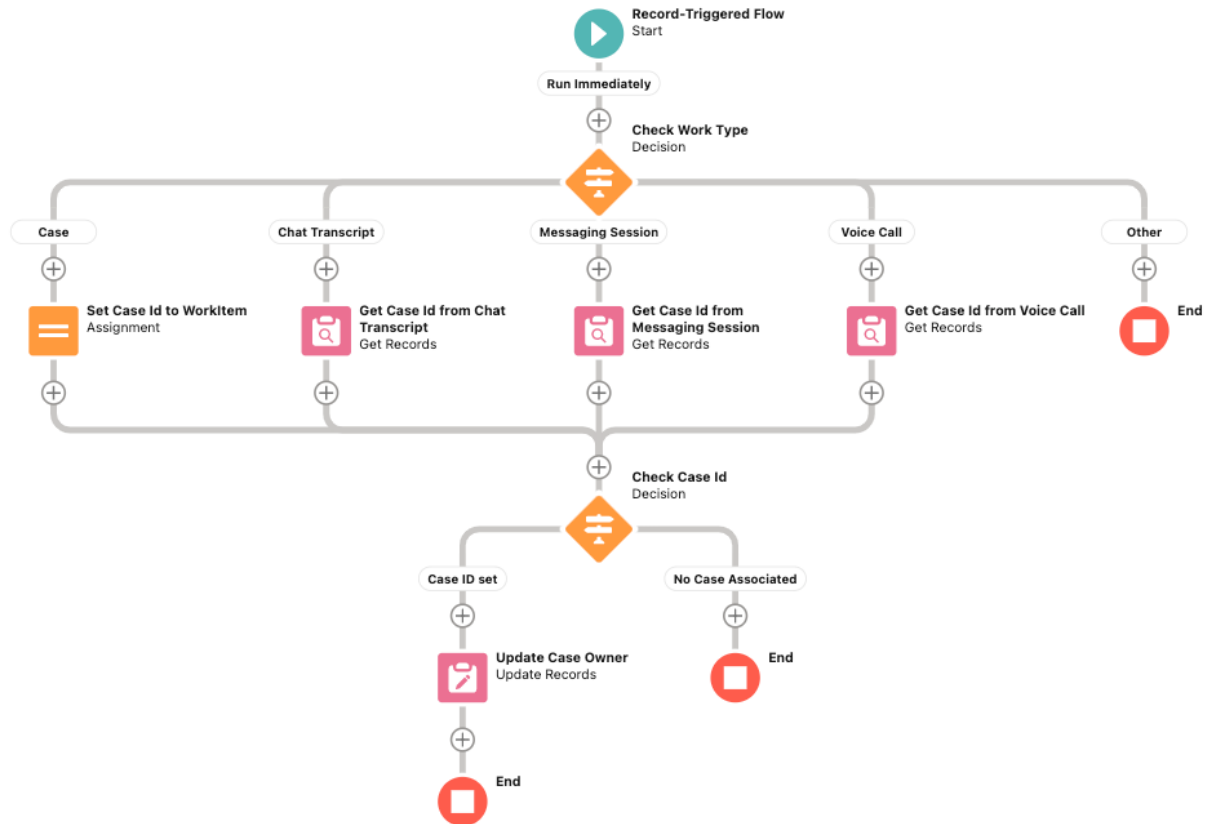
- Email-to-Case
 - Omni-Channel
-

Flows included

Below is a list of the Flows that are included in this package:

- [🔗 Service - Agent Work Opened](#)
 - [🔗 Service - Case - On Create](#)
 - [🔗 Service - Case - Routing](#)
 - [🔗 Service - Case - Status Updated](#)
 - [🔗 Service - Create Case for Channel](#)
 - [🔗 Service - Email Message - On Create or Update](#)
 - [🔗 Service - Messaging Session - On Create](#)
 - [🔗 Service - Messaging User - On Create](#)
 - [🔗 Service - Phone Number Search](#)
 - [🔗 Service - Set Entitlement on Case](#)
 - [🔗 Service - Voice Call - On Create](#) (excluded from unmanaged package)
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SERVICE - AGENT WORK OPENED



Description:

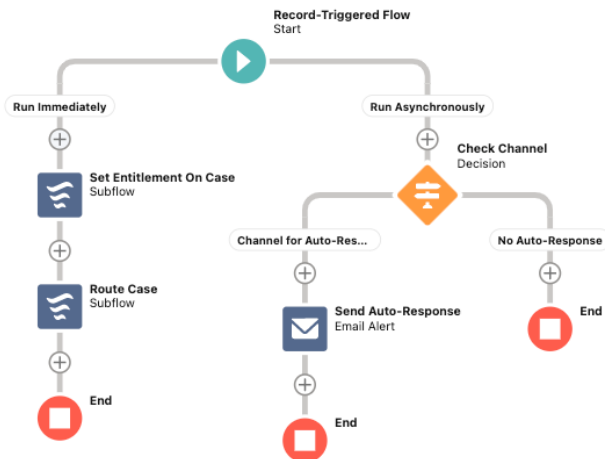
This Flow runs when a User accepts work in Omni-Channel. It finds the associated case to the work item and updates the case owner to match the owner of the work item to keep the channel work and the case owner aligned. Optionally you can perform extra case updates here such as updating the case state to a working state.

Required Updates:

Optional Updates:

- Update the 'Update Case Owner' element to also transition the case to a new state (e.g. 'Working')
- (if using Chat) - Update the 'Get_Case_Id_from_Chat_Transcript' element to lookup the ChatTranscript object to get the Case ID
- (if routing custom objects that relate to cases) - Add to a new Branch to lookup the case from that custom object

SERVICE - CASE - ON CREATE



Description:

This Flow runs when a new case is created, and does some basic associations and sends an auto-response. Much of the logic is in sub-flows, detailed later in this doc.

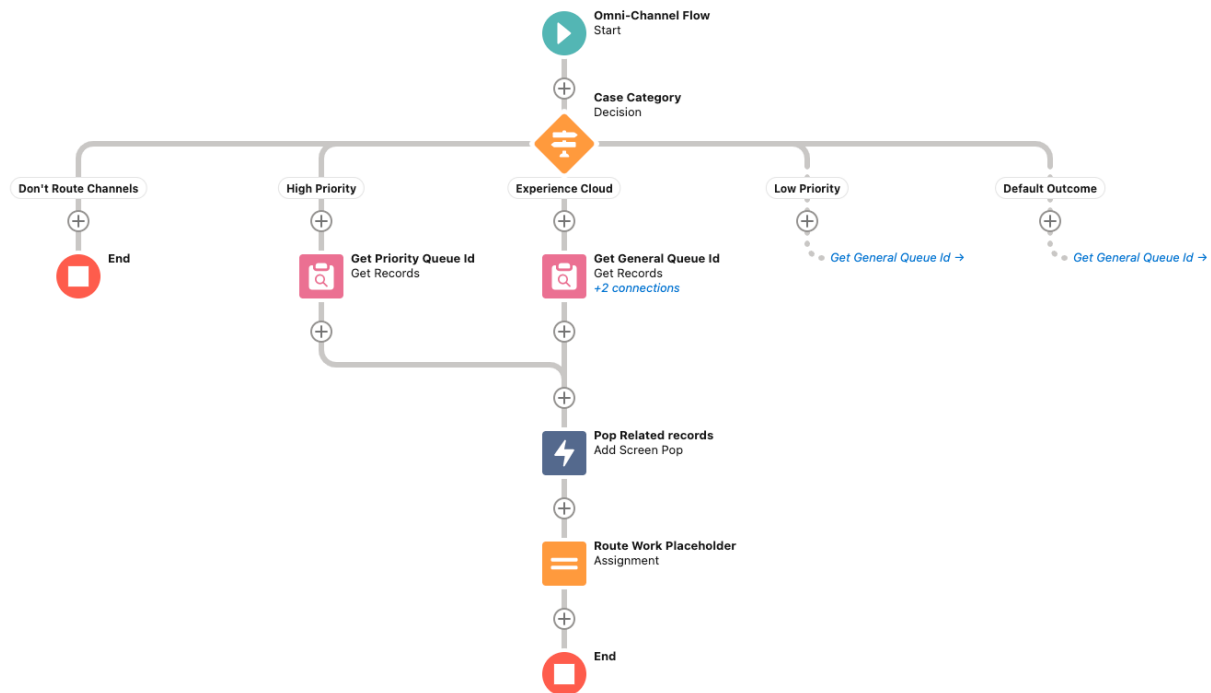
Required Updates:

1. Update the 'Check Channel' decision node to match your Case Origin's to determine when the Auto-Response should be set
2. Update the Send Auto-Response to use your own template/Email Alert (uses alert included in the package called 'Service - Case Auto-Response')

Optional Updates:

- If you are using Salesforce Knowledge and Einstein Article Recommendations then you can add an intelligent AI infused reply by calling the Flow action. [An example of how to do that is in our Help Docs](#)
- If you own Einstein for Service licenses, you can enhance this Flow by calling [the new Flow Action for Case Classification](#), and route or take action as appropriate

SERVICE - CASE - ROUTING



Description:

A Flow used to route the case work to the appropriate place, if/when required.

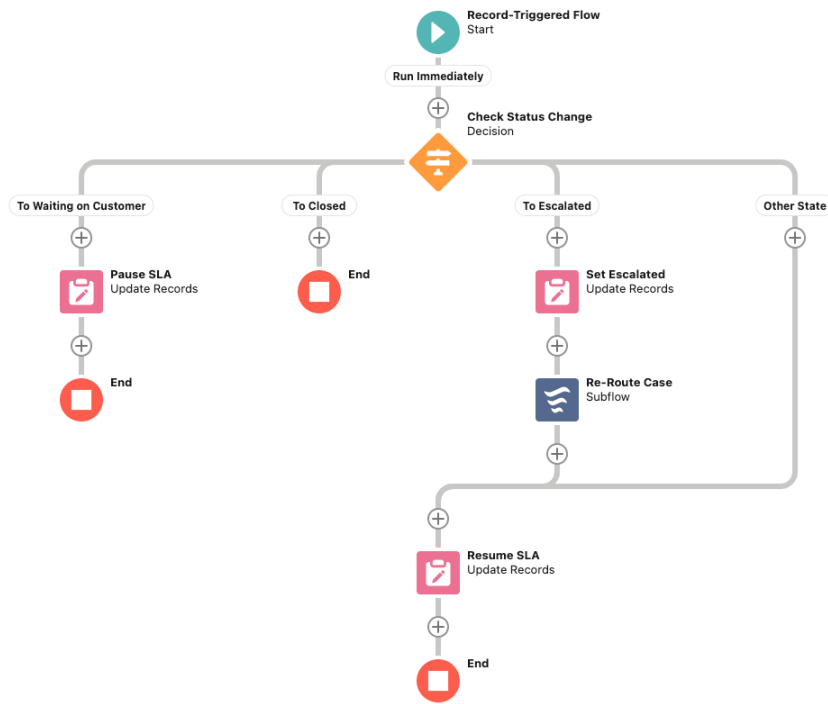
Required Updates:

1. Update the 'Case Category' decision node to check the fields and values relevant to your org (e.g. if you have 'Urgent' instead of 'Critical' or similar).
2. Update the lookups to the Queues to match your queues in your org
3. Add the 'Route Work' action in place of the 'Route Work Placeholder' element to use the 'SelectedQueueId' variable (if using Queues), and include the output of the 'Pop Related Records' element

Optional Updates:

- Add extra paths to the 'Case Category' to lookup to different queues as per your business requirements. Remember that this can be called both on case creation and on an update.

SERVICE - CASE - STATUS UPDATED



Description:

Called when the state of a case is updated to take the appropriate actions, such as set related fields or pause/resume the SLA/Milestones.

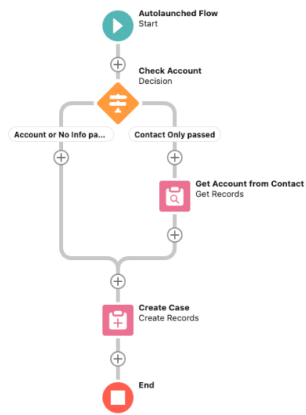
Required Updates:

1. Update the 'Check Status Change' decision node to include all of your Case Statuses, and map them to the appropriate actions

Optional Updates:

- Add an Email Alert that is sent when the case status moves to 'Closed'

SERVICE - CREATE CASE FOR CHANNEL

**Description:**

A very simple Flow that is just used for consistency - should be called by all channels if/when you want a case to be created.

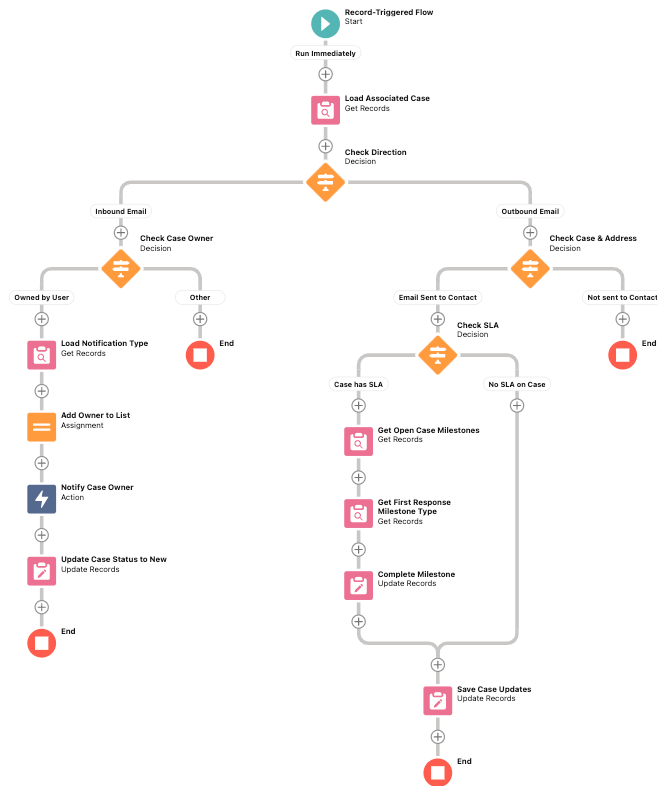
Required Updates:

None

Optional Updates:

- Pass in and set any other custom fields you may have for your case.

SERVICE - EMAIL MESSAGE - ON CREATE OR UPDATE



Description:

A Flow that is run when an email is either received into or sent out from Salesforce. For Outbound emails it attempts to stop any relevant SLAs/Milestones from running, and transition the case to a waiting state. For Inbound, it finds the current case owner (if it is a user) and sends them a Salesforce notification that there has been a reply to their email.

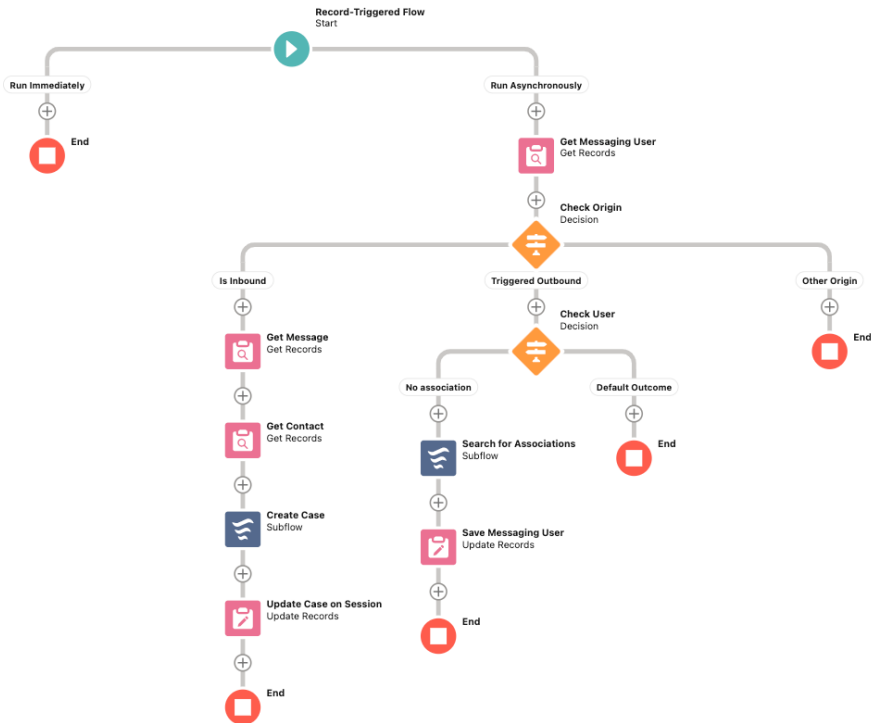
Required Updates:

1. Ensure you have a 'Custom Notification' in the Setup screens which is active, and applies for both Desktop and Mobile.
2. Update the 'Check Case & Address' decision node to ensure that auto-replies don't trigger the update, to do this update the check on the 'From Name' to match what your auto-reply emails come from (default in the Flow is 'Customer Service').
3. Update the Milestone lookups to ensure they are relevant to your org, especially the 'Get First Response' one which looks for a milestone with a particular name
4. Update the 'Save Case Updates' to select the state you want to transition the case to (if you do).
5. Update the 'Update Case Status to New' element to transition the case to the state you want to when a new email comes in (if you want to transition at all).

Optional Updates:

- Change the 'Notify Case Owner' action to instead re-route the case back to a queue using the Case Routing Flow if you'd rather it gets re-routed

SERVICE - MESSAGING SESSION - ON CREATE



Description:

This Flow runs when a new Messaging Session is created and based on whether it is an inbound message, or a triggered outbound message, it takes the appropriate action. For inbound messages, it loads the associated records and creates a case, using the contents of that inbound message, before setting it on the session. For outbound, it ensures that the appropriate records are associated to the Messaging User (such as Contact & Account).

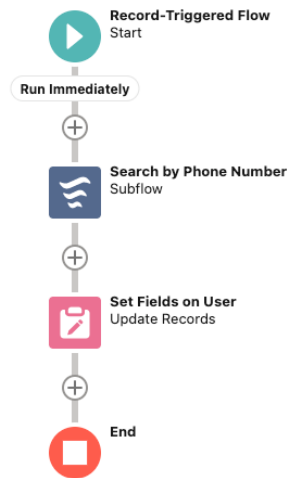
Required Updates

None

Optional Updates

- Remove case creation and have agents manually create and/or associate a case to the Session
- Handle 'AgentInitiated' messages as well, likely in a similar way to Inbound.
- If using leads, add a custom field to Messaging User for Lead, and set it here as well (and pass it onto the Messaging Session LeadId field).

SERVICE - MESSAGING USER - ON CREATE



Description

A Flow that runs when a new Messaging User is created, and attempts to find associated records based on the phone number

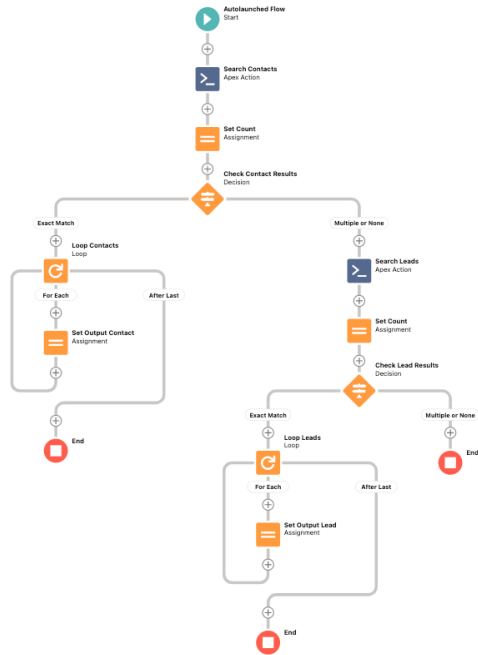
Required Updates:

1. If using a channel other than SMS, then you'll need to add some channel branching and extract the appropriate number to lookup from the platform key field, if possible.

Optional Updates

- Add a custom field to the Messaging User for the Lead, and set it here as well.

SERVICE - PHONE NUMBER SEARCH



Description:

This Flow takes in a phone number and searches for a results, firstly in the associated contacts and secondly for Leads. It uses Apex to make a SOSL query for these fields.

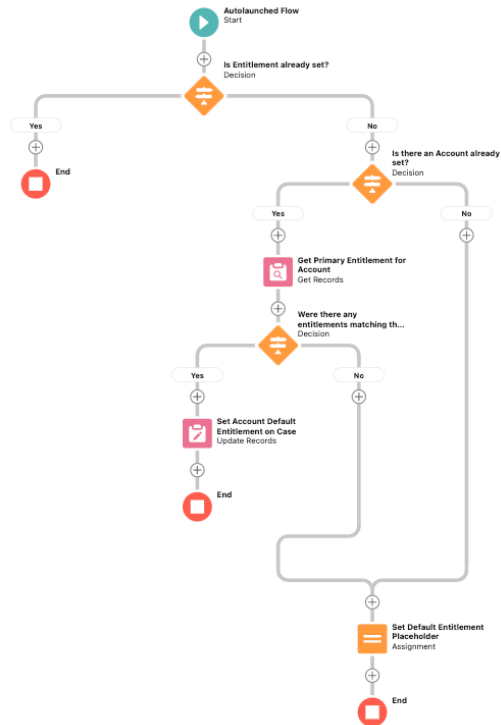
Required Updates

None

Optional Updates:

- Update to search any custom records or fields you have in your org
- Add alternative behavior for multiple matches (e.g. pick one from the list)

SERVICE - SET ENTITLEMENT ON CASE



Description:

A Flow that is designed to ensure that every case has an Entitlement set on it, regardless of whether the account has an associated entitlement or not (or if there is no account associated).

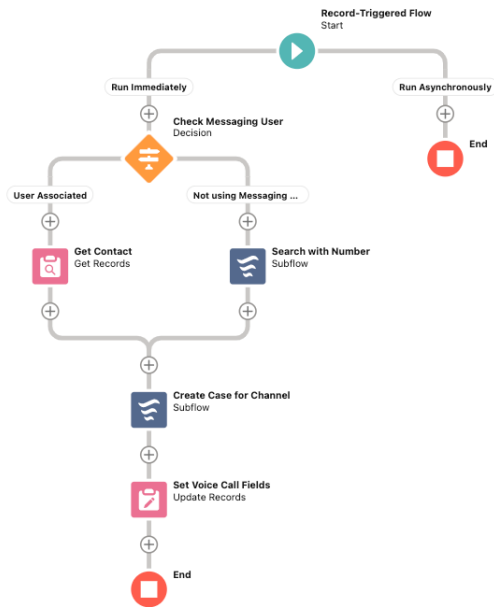
Required Updates

1. Ensure you have Edit access to these fields on the Case (by default even system admin does not) Entitlement Name, SlaStartDate, SlaExitDate or this Flow will fail.
2. Replace the 'Set Default Entitlement Placeholder' to set your default entitlement on the Case that you want to use

Optional Updates

- Add more logic to determine the appropriate Entitlement such as priority, or Contact information

SERVICE - VOICE CALL - ON CREATE



Description:

Called when a new Voice Call record is created, which could be done by Service Cloud Voice or High Velocity Sales (with Lightning Dialer). It ensures the appropriate contact is associated if one is found, based on the customers phone number, and creates and associates a case to the Voice Call.

Required Updates

None

Optional Updates

- Ensure the Case subject matches what you expect/want
- Create a custom field for 'Contact' or 'Case' on the Voice Call and associate the record to that instead (and associate the other to 'RelatedRecordId' like the Flow is for the case by default).