salesforce

Live Agent for Administrators

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LIVE AGENT FOR ADMINISTRATORS

Welcome to Live Agent for administrators! Live Agent is a comprehensive chat solution that makes it easy for your support organization's agents and support supervisors to assist customers. With Live Agent, your support organization can leverage the comprehensive customer service tools that are available in the Salesforce console while providing real-time chat support.

As an administrator, you can set up and customize Live Agent for your users, including agents and support supervisors. Live Agent is easy to set up and highly customizable. You can enable a suite of features that your agents and supervisors can use to assist customers.

Watch a Demo: ▶ Live Agent Configuration (Salesforce Classic) (English only)

A few major steps are involved in enabling, setting up, and deploying Live Agent in your Salesforce org. Let's get started.

Create a Basic Live Agent Implementation

Before you customize Live Agent, you need to create the basic Live Agent implementation for your Salesforce org. After you complete the basic setup steps, you'll have a functioning Live Agent implementation that your agents can use to chat with customers.

Customize Your Live Agent Implementation

After you set up your basic Live Agent implementation, customize it with solutions that are appropriate for your agents, supervisors, and customers. Live Agent offers several options for customizing your implementation declaratively, which means that no coding is required.

Set Up Live Agent in the Salesforce Console

After you set up and customize your basic Live Agent implementation, add it to the Salesforce console so that your agents and supervisors can start using chat to assist customers. Additionally, you can set up some other features in the Salesforce console to create an even more robust chat experience for your agents and your customers.

Live Agent in Lightning Experience

We captured the best of Live Agent and gave it a whole new look and feel in Lightning Experience. You don't even have to regenerate your deployment code if you already use Omni-Channel routing for chats. Live Agent routing isn't supported in Lightning Experience. Instead, you must route chats with Omni-Channel to chat in Lightning Experience.

Use Omni-Channel with Your Existing Live Agent Implementation

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

SEE ALSO:

Live Agent for Support Agents (Salesforce Classic)

Live Agent for Support Supervisors (Salesforce Classic)

Create a Basic Live Agent Implementation

Before you customize Live Agent, you need to create the basic Live Agent implementation for your Salesforce org. After you complete the basic setup steps, you'll have a functioning Live Agent implementation that your agents can use to chat with customers.

Watch a Demo: ▶ Live Agent Configuration (Salesforce Classic) (English only)

1. Enable Live Agent

   Get started with Live Agent by enabling it for your Salesforce org. After you enable Live Agent, you can customize it.

2. Create Live Agent Users

   Before your users can assist customers with chat, you need to assign the users as Live Agent users. Live Agent users are support agents and supervisors who have the Salesforce permissions to assist customers with chat.

3. Create and Assign Live Agent Skills

   Skills identify your agents' areas of expertise. When you assign an agent to a skill, that agent receives chat requests that are related to the agent's skill areas. You can also empower your supervisors to assign skills to agents. This information applies to Live Agent routing for chats only.

4. Create Live Agent Configurations

   Live Agent configurations define the Live Agent functionality that's available to your agents and support supervisors when agents chat with customers. Create Live Agent configurations to control the functionality of Live Agent in the Salesforce console.

5. Create Live Agent Deployments

   A deployment is a place on your company's website that's enabled for Live Agent. Create deployments to implement Live Agent and control its functionality on your website.

6. Create Chat Buttons

   Create chat buttons to enable customers to request a chat with an agent directly from your website.

7. Customize Your Live Agent Branding with Salesforce Sites

   To customize your Live Agent implementation with branding images, use a Lightning Platform site to upload the images for your chat window and chat buttons.

SEE ALSO:

   Customize Your Live Agent Implementation

   Add Live Agent to the Salesforce Console in Salesforce Classic

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To set up Live Agent:
- Customize Application

To create user profiles or permission sets:
- Manage Profiles and Permission Sets

Enable Live Agent

Get started with Live Agent by enabling it for your Salesforce org. After you enable Live Agent, you can customize it.

1. From Setup in Salesforce Classic, enter *Live Agent Settings* in the Quick Find box, then select **Live Agent Settings**.

2. Select `Enable Live Agent`.

3. Click **Save**.

Create Live Agent Users

Before your users can assist customers with chat, you need to assign the users as Live Agent users. Live Agent users are support agents and supervisors who have the Salesforce permissions to assist customers with chat.

All Live Agent users need the `API Enabled` administrative permission enabled on their associated profile before they can use Live Agent.

1. From Setup in Salesforce Classic, enter `Users` in the Quick Find box, then select **Users**.

2. Click **Edit** next to a user's name.

3. Select `Live Agent User`. If you don't see this checkbox, verify that your support organization has purchased enough Live Agent feature licenses.

4. Click **Save**.

After creating users, make sure that you assign them a Live Agent configuration and associate them with the appropriate skills.

Permissions for Live Agent Support Agents

You need to enable a few specific permissions for Live Agent support agents so that they have access to all the tools that they'll need to provide help to customers.

Permissions for Live Agent Support Supervisors

You must enable certain permissions for Live Agent support supervisors so that they have all the tools they need to monitor agents' activities and review customers' information.

SEE ALSO:

Create Live Agent Configurations

Profiles

Create and Assign Live Agent Skills

Permissions for Live Agent Support Agents

You need to enable a few specific permissions for Live Agent support agents so that they have access to all the tools that they'll need to provide help to customers.

General Permissions

Necessary Permission	Description
"API Enabled"	Required for all Live Agent users

Object Permissions

Record Type	Permission	Description	Considerations
Live Agent Sessions	"Read"	Enables agents to view session records	We don't recommend giving agents the ability to create, edit, and delete session records. Session records are created automatically and are meant to provide a paper trail with information about the time that agents spend online, so we don't recommend giving agents the ability to change these records.
Live Chat Visitors	"Read"	Enables agents to view visitor records	We don't recommend giving agents the ability to create, edit, and delete visitor records. Visitor records are created automatically and are meant to provide a paper trail that associates your customers with their chat transcripts, so we don't recommend giving agents the ability to change these records.

Record Type	Permission	Description	Considerations
Live Chat Transcripts	"Read"	Enables agents to view chat transcripts	We don't recommend giving agents the ability to create, edit, and delete chat transcripts. Transcripts are created automatically and are meant to provide a paper trail about your agents' interactions with customers, so we don't recommend giving agents the ability to change these records.
Quick Text	"Read"	Enables agents to view quick text messages and include ick xt in chats.	Without the "Read" permission on ick tt, agents can't access the qick txt sidebar in the Salesforce console.
	"Create"	Enables agents to create qick txt messages	If your qick txt messages need to be standardized across your organization, limit your agents' ability to create qick txt messages. In that case, give the "Create" permission to support supervisors instead.
	"Edit"	Enables agents to edit qick xt messages	If your qick txt messages need to be standardized across your support organization, limit your agents' ability to edit qick txt messages. In that case, give the "Edit" permission to support supervisors instead.
	"Delete"	Enables agents to delete quick text messages	If your qick txt messages need to be standardized across your organization, limit your agents' ability to delete qick text messages. In that case, give the "Delete" permission to support supervisors instead.

SEE ALSO:

Permissions for Live Agent Support Supervisors

You must enable certain permissions for Live Agent support supervisors so that they have all the tools they need to monitor agents' activities and review customers' information.

General Permissions

Necessary Permission	Description
"API Enabled"	Required for all Live Agent users

Optional Permission	Description
"Assign Live Agent Skills to Users"	Enables supervisors to assign skills to agents.

Object Permissions

Record Type	Permission	Description	Considerations
Live Agent Sessions	"Read"	Enables supervisors to view session records	None
	"Create"	Enables supervisors to create session records	Session records are created automatically and are meant to provide a paper trail that provides information about the time that agents spend online. We don't recommend tampering with these records, but you can give supervisors the ability to create them manually.
	"Edit"	Enables supervisors to edit session records	Session records are created automatically and are meant to provide a paper trail that provides information about the time that agents spend online. We don't recommend tampering with these records, but you can

Record Type	Permission	Description	Considerations
			give supervisors the ability to edit them.
	"Delete"	Enables supervisors to delete session records	Session records are created automatically and are meant to provide a paper trail that provides information about the time that agents spend online. We don't recommend tampering with these records, but you can give supervisors the ability to delete them.
Live Chat Transcripts	"Read"	Enables supervisors to view chat transcripts	None
	"Create"	Enables supervisors to create chat transcripts	Chat transcripts are created automatically and are meant to provide a paper trail about your agents' interactions with customers. We don't recommend tampering with these records, but you can give supervisors the ability to create transcripts manually.
	"Edit"	Enables supervisors to edit chat transcripts	Chat transcripts are created automatically and are meant to provide a paper trail about your agents' interactions with customers. We don't recommend tampering with these records, but you can give supervisors the ability to edit transcripts.
	"Delete"	Enables supervisors to delete chat transcripts	Chat transcripts are created automatically and are meant to provide a paper trail about your agents' interactions with customers. We don't recommend tampering with these records, but you can give supervisors the ability to delete transcripts.
Live Chat Visitors	"Read"	Enables supervisors to view visitor records	None

Record Type	Permission	Description	Considerations
	"Create"	Enables supervisors to create visitor records	Visitor records are created automatically and are meant to provide a paper trail that associates your customers with their chat transcripts. We don't recommend tampering with these records, but you can give supervisors the ability to create them manually.
	"Edit"	Enables supervisors to edit visitor records	Visitor records are created automatically and are meant to provide a paper trail that associates your customers with their chat transcripts. We don't recommend tampering with these records, but you can give supervisors the ability to edit them.
	"Delete"	Enables supervisors to delete visitor records	Visitor records are created automatically and are meant to provide a paper trail that associates your customers with their chat transcripts. We don't recommend tampering with these records, but you can give supervisors the ability to delete them.
Quick Text	"Read"	Enables supervisors to view Quick Text messages	None
	"Create"	Enables supervisors to create Quick Text messages	None
	"Edit"	Enables supervisors to edit Quick Text messages	None
	"Delete"	Enables supervisors to delete Quick Text messages	None

SEE ALSO:

Live Agent Session Records

Live Agent Transcripts

Live Agent Visitor Records

Edit Object Permissions in Profiles

Create and Assign Live Agent Skills

Skills identify your agents' areas of expertise. When you assign an agent to a skill, that agent receives chat requests that are related to the agent's skill areas. You can also empower your supervisors to assign skills to agents. This information applies to Live Agent routing for chats only.

1. From Setup, enter `Skills` 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 "Accounts" for agents who specialize in questions about customer accounts.

4. In the Assign Users area, select the users whom you want to associate with the skill.

5. In the Assign Profiles area, select the profiles that you want to associate with the skill.

6. Click **Save**.

To enable supervisors to assign skills, enable the "Assign Live Agent Skills to Users" permission on their profiles, or assign it to individual users via a permission set. When supervisors have this permission, they can go to **Setup** > **Customize** > **Live Agent Skills** and update the assigned profiles or users under each skill.

EDITIONS

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Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To create skills:
- Customize Application

To assign skills (supervisors):
- Assign Live Agent Skills to Users

Create Live Agent Configurations

Live Agent configurations define the Live Agent functionality that's available to your agents and support supervisors when agents chat with customers. Create Live Agent configurations to control the functionality of Live Agent in the Salesforce console.

For efficiency, create profiles and users before you create configurations. That way, you can create a configuration and assign it to users and profiles at the same time.

Live Agent configurations enable you to control your users' access to certain Live Agent features. You can create multiple configurations that define Live Agent's functionality for multiple types of users. For example, you might create a configuration specifically for experienced agents that gives them more permissions than new agents have, or you might create a configuration for support supervisors that gives them the permissions that they need to monitor their employees.

1. From Setup in Salesforce Classic, enter `Live Agent Configurations` in the Quick Find box, then select **Live Agent Configurations**.

2. Click **New**.

3. Choose the settings for your Live Agent configuration.

4. Click **Save**.

Live Agent Configuration Settings

Live Agent configuration settings control the functionality that's available to agents and their supervisors while agents chat with customers.

Supported Browsers for Live Agent Notifications

Live Agent notifications help agents respond to chats efficiently by alerting agents when certain events occur. The types of chat notifications that are supported are determined by the web browsers your agents use.

SEE ALSO:

Create and Assign Live Agent Skills

Create Live Agent Users

Live Agent Configuration Settings

Live Agent configuration settings control the functionality that's available to agents and their supervisors while agents chat with customers.

Apply settings when you create or edit a Live Agent configuration.

Basic Information

Configure the basic functionality that's available to agents when they chat with customers.

Setting	What It Does
Live Agent Configuration Name	Name of this configuration.
	This configuration name, or a version of it, automatically becomes the `Developer Name`.
Developer Name	Sets the API name for this configuration.
Chat Capacity	Indicates how many chats an agent who is assigned to this configuration can be engaged in at the same time.
Sneak Peek Enabled	Indicates whether agents can see what a chat customer is typing before the customer sends a chat message.
Request Sound Enabled	Indicates whether to play an audio alert when the agent receives a new chat request.
Disconnect Sound Enabled	Indicates whether to play an audio alert when a chat is disconnected.
Notifications Enabled	Indicates whether to display a desktop alert when an agent receives a new chat request.
Custom Agent Name	Sets the agent's name as it appears to customers in the chat window.
Auto Greeting	Sets a customized greeting message that the customer receives automatically when an agent accepts the customer's chat request.
	Optionally, use merge fields to customize the information in your greeting by using the Available Merge Fields tool. For example, you can personalize the chat experience by using merge fields to include the customer's name in the greeting.
	📝 Note: If you specify an automatic greeting message in both your Live Agent configuration and in an individual

Setting	What It Does
	chat button, the message that's associated with your chat button overrides the message that's associated with your configuration.
`Auto Away on Decline`	Sets the agent's Live Agent status to "Away" automatically when the agent declines a chat request. This option applies only when agents are assigned to chat buttons that use Live Agent push routing.
`Auto Away on Push Time-Out`	Sets an agent's Live Agent status to "Away" automatically when a chat request that's been pushed to the agent times out. This option applies only when agents are assigned to chat buttons that use Live Agent push routing.
`Critical Wait Alert Time`	Determines the number of seconds that the agent has to answer a customer's chat before the chat tab alerts the agent to answer it.
`Agent File Transfer Enabled`	Indicates whether an agent can enable customers to transfer files through a chat.
`Visitor Blocking Enabled`	Indicates whether an agent can block visitors from an active chat within the Salesforce console. See Let Your Agents Block Visitors by IP Address.
`Assistance Flag Enabled`	Indicates whether an agent can send a request for help ("raise a flag") to a supervisor.

Chatlets

Chatlets are tools that are available only to organizations that use Live Agent in the Live Agent console. The Live Agent console is no longer supported, so we don't recommend setting up chatlets. But don't worry—if you use Live Agent in the Salesforce console, you don't need chatlets.

Assign Users

Assign eligible users to the configuration to give them access to Live Agent functionality. Later, you'll see that 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 profile.

⚠ Warning: Users can be assigned to only one Live Agent configuration at a time. If you assign the same user to a second Live Agent configuration, the system removes that user from the first Live Agent configuration without warning you. So make sure that you know exactly which Live Agent configuration each user should be assigned to!

For example, let's say that User A is assigned to Live Agent Configuration A. Then, you create Live Agent Configuration B and accidentally assign User A to it. Salesforce automatically removes User A from Live Agent Configuration A and reassigns the user to Live Agent 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 Live Agent 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 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.

Supervisor Settings (Live Agent Routing Only)

Supervisor settings determine the Live Agent functionality that's available to support supervisors. In addition, these settings determine the default filters that apply to the Agent Status list in the supervisor panel.

Setting	What It Does
Chat Monitoring Enabled	Indicates whether supervisors can monitor their agents' chats in real time while their agents interact with customers.
Whisper Messages Enabled	Indicates whether supervisors can send private messages to agents while agents chat with customers.
Agent Sneak Peek Enabled	Indicates whether supervisors can preview an agent's chat messages before the agent sends them to the customer.
Default Agent Status Filter	Determines the default agent status, such as Online, Offline, or Away, by which to filter agents in the supervisor panel. When supervisors view the Agent Status list in the supervisor panel, they see a list of agents who have that status.
Default Skill Filter	Determines the default skill by which to filter agents in the supervisor panel. When supervisors view the Agent Status list in the supervisor panel, they see a list of agents who are assigned to that skill.
Default Button Filter	Determines the default button by which to filter agents in the supervisor panel. When supervisors view the Agent Status list in the supervisor panel, they see a list of agents who are assigned to that button.

Setting	What It Does
Assigned Skills	Determines the skills that are visible to supervisors in the supervisor panel.
	When supervisors view the Agent status list in the supervisor panel, they see a list of agents who are assigned to these skills. If you don't select any skills, the Agent Status list displays agents who are assigned to any skill.

Chat Conference Settings (Live Agent Routing Only)

Determine whether agents can invite other agents to join them in a customer chat. Chat conferencing lets your agents include multiple agents in a single chat. That way, your agents can help your customers get the solutions that they need without making your customers wait for their chats to be transferred. Chat conferencing isn't available for chats routed with Omni-Channel.

> Note: Chat conferencing does not support the Related Entities panel. If you attempt to use it with chat conferencing, important details might not be saved on your record.

Setting	What It Does
Chat Conferencing Enabled	Indicates whether agents can invite other agents to join them in customer chats.

Chat Transfer Settings

Determine how agents can transfer chats to other agents.

Setting	What It Does
Chat Transfer to Agents Enabled	Indicates whether agents can transfer chats to another agent directly.
Chat Transfer to Skills Enabled	Indicates whether agents can transfer chats to agents assigned to a particular skill.
Chat Transfer to Skills	Determines the skill groups to which agents can transfer chats.
	Agents can transfer chats to available agents who are assigned to those skills.
Chat Transfer to Live Chat Buttons Enabled	Indicates whether agents can transfer chats to a button or queue.
Chat Transfer to Live Chat Buttons	Determines the buttons to which agents can transfer chats.
	Agents can transfer chats to available agents who are assigned to those buttons.

SEE ALSO:

The Live Agent Supervisor Panel for Salesforce Classic

Agent Status List

Supported Browsers for Live Agent Notifications

Live Agent notifications help agents respond to chats efficiently by alerting agents when certain events occur. The types of chat notifications that are supported are determined by the web browsers your agents use.

Two types of chat notifications are available in Live Agent.

Chat request notifications

Notifies an agent when the agent receives a chat request; available as audio notifications and desktop notifications

Disconnect notifications

Notifies an agent when the agent is disconnected from Live Agent; available as audio notifications only

Browser	Version	Audio Notifications Supported?	Desktop Notifications Supported?
Google Chrome™	Most recent stable version	Yes	Yes
Mozilla® Firefox®	Most recent stable version	Yes	Yes
Apple® Safari®	6.x on Mac OS X	Yes	Yes
Windows® Internet Explorer®	9	No	No

Create Live Agent Deployments

A deployment is a place on your company's website that's enabled for Live Agent. Create deployments to implement Live Agent and control its functionality on your website.

To customize the chat window that your customers see, you first need to create a Salesforce site to host your custom images.

A deployment consists of a few lines of JavaScript that you add to a Web page. Your organization can have a single Live Agent deployment or multiple deployments. For example, if you have a single service center that supports multiple websites, creating a separate deployment for each site enables you to present multiple chat windows to your visitors.

1. From Setup in Salesforce Classic, enter `Deployments` in the Quick Find box, then select **Deployments**.

2. Click **New**.

3. Choose the settings for your deployment.

4. Click **Save**.
    Salesforce generates the deployment code.

5. Copy the deployment code, and then paste it on each Web page where you want to deploy Live Agent. For best performance, paste the code immediately before the closing body tag (that is, `</body>`).

    📝 **Note:** If you're using security zones in Internet Explorer 9, verify that your deployment and any website that hosts that deployment are in the same security zone. Due to an issue with Internet Explorer, it's not possible to launch a chat window from a website that's in a different security zone. For more information on security zones, refer to Internet Explorer help.

    📝 **Note:** If you move instances for an instance refresh or org migration, regenerate the code using these steps after the maintenance is complete.

Live Agent Deployment Settings

Live Agent deployment settings control the functionality that's available to agents and their supervisors while agents chat with customers.

Permitted Domains and Live Agent Deployments

To enhance security and minimize the number of illegitimate chat requests that you receive, use the permitted domains option when you create Live Agent deployments. There are a few considerations to keep in mind when you use permitted domains.

SEE ALSO:

Customize Your Live Agent Branding with Salesforce Sites

Live Agent Deployment Settings

Live Agent deployment settings control the functionality that's available to agents and their supervisors while agents chat with customers.

Apply settings when you create or edit a Live Agent deployment.

Basic Information

Configure the basic functionality that's available on a particular Live Agent deployment.

Setting	What It Does
Live Chat Deployment Name	Names the deployment. This deployment name, or a version of it, automatically becomes the `Developer Name`.
Developer Name	Sets the API name for this deployment.
Chat Window Title	Sets the name of the chat window as it appears to customers.
Allow Visitors to Save Transcripts	Indicates whether customers can save copies of their chat transcripts after they finish chatting with an agent.
Allow Access to Pre-Chat API	Indicates whether developers can access and implement the pre-chat API. ⚠️ Warning: The pre-chat API gives developers access to potentially personal information that customers provide in pre-chat forms, such as the customer's name and email address.
Permitted Domains	Determines the domains that can host the deployment. When using permitted domains: • List as many domains as you need to, but only one per line. • Use only the domain and subdomain. For example, use xyz.domain.com, domain.com, or www.domain.com. Don't include http:// or mappings to specific pages within a domain, such as domain.com/page. • Make sure that you specify all the domains that you want to allow to host the deployment.

Setting	What It Does
	• To make the deployment usable on any domain, leave the Permitted Domains field empty.
`Enable Custom Timeouts`	Indicates whether a warning and timeout for the agent are enabled for when the customer is idle in a chat.
`Idle Connection Warning Duration`	Indicates the duration, in seconds, that the customer can remain idle or disconnected before a warning is sent to the agent. The default value is 40 seconds. Appears when `Enable Custom Timeouts` is selected.
`Idle Connection Timeout Duration`	Indicates the duration, in seconds, that the customer can remain idle or disconnected before the chat ends. The default value is 110 seconds. Appears when `Enable Custom Timeouts` is selected.

Chat Window Branding

You can optionally customize your chat windows with custom images by associating your deployment with a Lightning Platform site and its static resources.

Setting	What It Does
`Branding Image Site`	Determines the Lightning Platform site that's associated with the deployment.
	By associating your deployment with a Lightning Platform site, you can customize your deployment with branding images. Store your branding images as static resources with your Salesforce site.
`Chat Window Branding Image`	Sets the custom graphic that appears in the customer's chat window.
`Mobile Chat Window Branding Image`	Sets the custom graphic that appears in the customer's chat window when the customer accesses chat from a mobile site.

SEE ALSO:

Customize Your Live Agent Branding with Salesforce Sites

Permitted Domains and Live Agent Deployments

Permitted Domains and Live Agent Deployments

To enhance security and minimize the number of illegitimate chat requests that you receive, use the permitted domains option when you create Live Agent deployments. There are a few considerations to keep in mind when you use permitted domains.

- List as many domains as you need to, but only one per line.
- Use only the domain and subdomain—for example, xyz.domain.com, domain.com, or www.domain.com. Don't include http:// or mappings to specific pages within a domain, such as domain.com/page.

- Specify all the domains that you want to allow to host the deployment.
- To make the deployment usable on any domain, leave the Permitted Domains field empty.

SEE ALSO:

[Create Live Agent Deployments](#)

Create Chat Buttons

Create chat buttons to enable customers to request a chat with an agent directly from your website.

Before you create chat buttons, you need to:

- Create skills. Each chat button is associated with a particular skill or set of skills so that chats that are initiated from the button are routed to the appropriate agents.
- Create a Salesforce site and static resources to use custom images for the online and offline versions of your button. If you don't have a Salesforce site, you can specify online and offline button images or text by modifying the code that's generated when you create a button.

You need to create the buttons that visitors click to start chats. Like a deployment, a button consists of several lines of JavaScript that you copy and paste into Web pages. A single deployment can have multiple buttons; each button enables you to refine the chat experience for visitors. For example, your service deployment might have buttons for personal computer, laptop, or tablet issues. Each button is mapped to a skill or set of skills to ensure that visitors' inquiries go to only those agents who can solve the visitors' problems.

1. From Setup in Salesforce Classic, enter `Chat Buttons` in the Quick Find box, then select **Chat Buttons & Invitations**.

2. Click **New**.

3. Select Chat Button from the `Type` field.

4. Choose the remaining settings for your chat button.

5. Click **Save**.

6. Copy the button code, and then paste it on each Web page where you've deployed Live Agent. Make sure that you paste the code in the area on the page where you want the button to appear.

> 💡 **Tip:** Because the code changes with each modification, remember to copy and paste the code each time that you update the button.

[Chat Button Settings](#)

Chat button settings control the behavior of the chat buttons that customers use to interact with agents.

[Chat Routing Options](#)

Routing options in Live Agent enable you to specify how incoming chat requests are directed to agents.

Chat Queuing Options

Queuing options in Live Agent let you control how incoming chat requests are handled when no agents are available.

SEE ALSO:

Create and Assign Live Agent Skills

Customize Your Live Agent Branding with Salesforce Sites

Chat Button Settings

Chat button settings control the behavior of the chat buttons that customers use to interact with agents.

Apply settings when you create or edit a Live Agent chat button.

Basic Information

Configure the basic functionality that's available on a particular Live Agent chat button.

Setting	What It Does
Type	Determines the type of button that you want to create. ⚠️ **Warning:** When you create a chat button to host on your website, you must set this option to Chat Button.
Name	Names the chat button. This button name, or a version of it, automatically becomes the `Developer Name`.
Developer Name	Sets the API name for the chat button.
Language	Sets the default language for text in the chat window.
Enable Customer Time-Out	Indicates whether chats are ended if the customer doesn't respond within a specified period.
Customer Time-Out (seconds)	Sets the amount of time that a customer has to respond to an agent message before the session ends. The timer stops when the customer sends a message and starts again from 0 on the next agent's message.
Customer Time-Out Warning (seconds)	Sets the amount of time that a customer has to respond to an agent message before a warning appears and a timer begins a countdown. The warning disappears (and the timer stops) each time the customer sends a message. The warning disappears (and the timer resets to 0) each time the agent sends message. The warning value must be shorter than the time-out value (we recommend at least 30 seconds).

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Setting	What It Does
Custom Agent Name	Sets the agent's name as it appears to customers in the chat window.
Auto Greeting	Sets a customized greeting message that the customer receives automatically when an agent accepts the customer's chat request.
	Optionally, use merge fields to customize the information in your greeting by using the Available Merge Fields tool. For example, you can personalize the chat experience by using merge fields to include the customer's name in the greeting.
	Note: If you specify an automatic greeting message in both your Live Agent configuration and in an individual chat button, the message that's associated with your chat button overrides the message that's associated with your configuration.

Routing Information

Configure how the button or invitation routes chats to the best-fit agent.

Setting	What It Does
Routing Type	Sets how chats are routed to an agent.
Skills	Associates skills with the button. Incoming chat requests that originate from the button are routed to agents with the skills that you specify.
Push Time-Out (seconds)	Sets the amount of time an agent has to answer a chat request before the request is rerouted to another agent.
Enable Queue	Indicates that queueing is enabled. Queueing allows incoming chat requests to wait in a queue until an agent with the appropriate skills is available to accept the chat.
Queue Size Per Agent	Determines the queue's capacity to hold chat requests per available agent. For Live Agent routing or when chats have a size of 1, this setting controls the number of chats allowed to queue for each agent.
Overall Queue Size	Determines the queue's capacity to hold chat requests. For Live Agent routing or when chats have a size of 1, this number is the maximum number of chats allowed to queue.
Reroute Declined Requests	Lets a chat request that's been declined by all available agents be rerouted and sent to all available agents again. Available only for requests with Least Active and Most Available routing types.
Automatically Accept Chats	Lets chat requests originating from this button be automatically accepted by the first available agent.

Chat Button Customization

You can optionally customize your chat button with custom images by associating your deployment with a Salesforce site and its static resources.

Setting	What It Does
Site for Resources	Determines the Salesforce site that's associated with the chat button. By associating your button with a Salesforce site, you can customize the button with branding images. Store your branding images as static resources with your Salesforce site.
Online Image	Sets the custom button graphic that appears when the chat button is unavailable.
Offline Image	Sets the custom button graphic that appears when the chat button is available for customers to request new chats.
Custom Chat Page	Replaces the standard Live Agent chat window with a custom chat window page that you've developed. Use this option only to use a chat window other than the default chat window that Live Agent provides.
Pre-Chat Form Page	Directs Live Agent to the Lightning Platform page that hosts your customized pre-chat form that customers see before they begin a chat with an agent.
Pre-Chat Form URL	Directs Live Agent to the URL of the web page that hosts your pre-chat form.
Post-Chat Page	Directs Live Agent to your customized post-chat page that customers see after they complete a chat.
Post-Chat Page URL	Directs Live Agent to the URL of the web page that hosts your post-chat page.

SEE ALSO:

Customize Your Live Agent Branding with Salesforce Sites

Chat Routing Options

Chat Queuing Options

Pre-Chat Forms and Post-Chat Pages

Chat Routing Options

Routing options in Live Agent enable you to specify how incoming chat requests are directed to agents.

Routing Option	Description
Choice	Incoming chat requests are added to the queue in Live Agent in the Salesforce console and are available to any agent with the required skill.
Least Active	Incoming chats are routed to the agent with the required skill who has the fewest active chats.
	This option is a push option, which means that incoming chats are routed, or "pushed," to agents. You can specify the amount of time that an agent has to answer a chat request before it's routed to the next available, qualified agent.

Routing Option	Description
Most Available	Incoming chats are routed to the agent with the required skill and the greatest difference between chat capacity and active chat sessions. For example: Agent A has a capacity of eight and Agent B has a capacity of two. If Agent A has two active chat sessions while Agent B has one, incoming chats are routed to Agent A.
	This option is a push option, which means that incoming chats are routed, or "pushed," to agents. You can specify the amount of time that an agent has to answer a chat request before it's routed to the next available, qualified agent.
Omni	Incoming chats are routed to agents using Omni-Channel queues. You must route chats with Omni-Channel if you want to use Live Agent in Lightning Experience.

Chat Queuing Options

Queuing options in Live Agent let you control how incoming chat requests are handled when no agents are available.

For each Live Agent chat button or invitation that you create, you can enable queuing to put incoming chat requests on hold if no agents with the required skills are available to accept the requests. You can also specify the maximum number of requests in a queue. By enabling queues and setting limits for them, you can control how incoming chat requests are handled, which helps agents manage chat backlogs.

With queuing enabled, your company can accept incoming chat requests even when agents are at capacity, and you can specify the maximum number of requests to accept. This helps agents work effectively and limits the amount of time that customers spend waiting to chat.

The way that chat queuing works is determined by chat routing options. Routing options are set through your chat button or automated invitation. See Chat Routing Options to learn more about how you can route chats to the right agents.

Let's look at how queuing and routing options work together:

Queuing Option	With This Routing Option	Results
Queuing is not enabled	Choice	• Users see the online version of your chat button and can submit new requests unless there are no agents with the required skill who are available or all online agents have reached capacity. • Incoming chat requests are added to the Live Agent widget.

Queuing Option	With This Routing Option	Results
		• When agents have capacity for new chat sessions, they can select incoming requests from the list.
Queuing is not enabled	`Least Active` or `Most Available`	• Users see the online version of your chat button and can submit new requests unless there are no agents with the required skill who are available or all online agents have reached capacity. • When agents have the capacity for new chat sessions, requests are routed to them.
Queuing is enabled without a per-agent or overall limit	`Choice`	• Users see the online version of your chat button and can submit new requests unless there are no agents with the required skill who are available. • Incoming chat requests are added to the Chat Requests list. • When agents have capacity for new chat sessions, they can accept incoming requests from the list.
Queuing is enabled without a per-agent or overall limit	`Least Active` or `Most Available`	• Users see the online version of your chat button and can submit new requests unless there are no agents with the required skill who are available. • When agents have the capacity for new chat sessions, requests are routed to them.
Queuing is enabled with a per-agent or overall limit defined	`Choice`	• Users see the online version of your chat button and can submit new requests unless there are no agents with the required skill who are available or until the queue limit is reached. Users then see the offline version of the button until older chat sessions have ended. • Incoming chat requests are added to the queue until the per-agent or overall limit is reached, at which point no new requests are accepted until older chat sessions have ended.

Queuing Option	With This Routing Option	Results
		• When agents have capacity for new chat sessions, they can accept incoming requests from the list.
Queuing is enabled with a per-agent or overall limit defined	`Least Active` or `Most Available`	• Users see the online version of your chat button and can submit new requests unless there aren't any available agents with the required skill, or until the queue limit is reached. In those cases, users see the offline version of the button until older chat sessions have ended and an agent is available.
		• Incoming chat requests are added to the queue until the per-agent or overall limit is reached, at which point no new requests are accepted until older chat sessions have ended.
		• When agents have the capacity for new chat sessions, requests are routed to them.

SEE ALSO:

   Chat Routing Options

Customize Your Live Agent Branding with Salesforce Sites

To customize your Live Agent implementation with branding images, use a Lightning Platform site to upload the images for your chat window and chat buttons.

To customize your chat window and chat buttons, you need to create one or more Lightning Platform sites and then upload the images that you want to use as static resources. Static resources enable you to upload content that you can reference in a Visualforce page. Each static resource has its own URL that Salesforce uses to access the images when the chat window loads.

1. Create a Lightning Platform site to host your images.

   When you create a Lightning Platform site for your Live Agent deployment, you need to provide only the following information.

   - A site label and site name
   - A site contact
   - The active site's home page
   - A site template

2. Upload your branding images as static resources.

   📝 **Note:** The maximum size for a standard chat window images is 50 pixels.

SEE ALSO:

Creating and Editing Salesforce Sites

Defining Static Resources

Create Chat Buttons

Create Automated Chat Invitations

Create Live Agent Deployments

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To create and edit Salesforce Sites:
- Customize Application

Customize Your Live Agent Implementation

After you set up your basic Live Agent implementation, customize it with solutions that are appropriate for your agents, supervisors, and customers. Live Agent offers several options for customizing your implementation declaratively, which means that no coding is required.

Create Automated Chat Invitations

Set up automated chat invitations that appear as animated pop-ups on your website to invite customers to chat with an agent.

Pre-Chat Forms and Post-Chat Pages

Pre-chat forms and post-chat pages in Live Agent enable you to exchange information with customers who contact your company through chat.

Create Quick Text Messages

With quick text, users can insert standardized notes, greetings, and answers to common questions without retyping the message each time. Create custom messages for your users to insert when they communicate with customers.

Set Visibility for Live Agent Users

Choose how your Live Agent users can view the Supervisor Tab and Live Agent Sessions using profiles and permission sets.

Set Privacy Options for Live Agent Users

Protect your agents and the customers they assist by blocking sensitive data and unwanted visitors.

SEE ALSO:

Create a Basic Live Agent Implementation

Add Live Agent to the Salesforce Console in Salesforce Classic

Create Automated Chat Invitations

Set up automated chat invitations that appear as animated pop-ups on your website to invite customers to chat with an agent.

Before you create automated invitations, you need to:

- Create skills. Each chat button is associated with a particular skill or set of skills so that chats that are initiated from the button are routed to the appropriate agents.

- Create a Salesforce site and static resources to use custom images for the online and offline versions of your button. If you don't have a Salesforce site, you can specify online and offline button images or text by modifying the code that's generated when you create a button.

Automated invitations can be set to trigger based on certain criteria, such as whether a customer remains on a Web page for more than a specified amount of time. Invitations can be associated with specific skills, which ensures that customers will be routed to the appropriate agent when they accept an invitation to chat.

1. From Setup in Salesforce Classic, enter `Chat Buttons & Invitations` in the Quick Find box, then select **Chat Buttons & Invitations**.

2. Click **New**.

3. Under `Type`, select Automated Invitation.

4. Click **Save**.

5. Copy the invitation code, and then paste it on each Web page where you've deployed Live Agent. Make sure that you paste the code in the area on the page where you want the invitation to appear.

   💡 **Tip:** Because the code changes with each modification, remember to copy and paste the code each time that you update the invitation.

Automated Invitation Settings

Automated invitation settings control the behavior of the invitations that are sent to your customers to prompt them to chat with agents while they visit your website.

SEE ALSO:

Create and Assign Live Agent Skills

Customize Your Live Agent Branding with Salesforce Sites

Create Live Agent Deployments

Automated Invitation Settings

Automated invitation settings control the behavior of the invitations that are sent to your customers to prompt them to chat with agents while they visit your website.

Apply settings when you create or edit a Live Agent automated invitation.

Basic Information

Configure the basic functionality that's available on a particular Live Agent chat button.

Setting	What It Does
Type	Determines whether to create a chat button or automated invitation. ⚠️ Warning: When creating an automated chat invitation, you must set this option to Automated Invitation.
Active	Determines whether the automated invitation is "active" or can automatically be sent to customers.
Name	Names the invitation. This invitation name, or a version of it, automatically becomes the `Developer Name`.
Developer Name	Sets the API name for the invitation.
Deployments	Allows you to choose the deployments where this invitation appears.
Language	Sets the default language for text in the chat window.
Enable Customer Time-Out	Indicates whether chats are ended if the customer doesn't respond within a specified period.
Customer Time-Out (seconds)	Sets the amount of time that a customer has to respond to an agent message before the session ends. The timer stops when the customer sends a message. The timer resets to 0 each time the agent sends a message.
Customer Time-Out Warning (seconds)	Sets the amount of time that a customer has to respond to an agent message before a warning appears and a timer begins a countdown. The warning disappears (and the timer stops) each time the customer sends a message. The warning disappears (and the timer resets to 0)

Setting	What It Does
	each time the agent sends message. The warning value must be shorter than the time-out value (we recommend at least 30 seconds).
Custom Agent Name	Sets the agent's name as it appears to customers in the chat window.
Auto Greeting	Sets a customized greeting message that the customer receives automatically when an agent accepts the customer's chat request from an invitation.
	Optionally, use merge fields to customize the information in your greeting by using the Available Merge Fields tool. For example, you can personalize the chat experience by using merge fields to include the customer's name in the greeting.
	Note: If you specify an automatic greeting message in your Live Agent configuration and in an invitation, the message that's associated with your invitation will override the message that's associated with your configuration.

Routing Information

Specify how this invitation routes chats to the best-fit agent.

Setting	What It Does
Routing Type	Determines how incoming chat requests that originate from the invitation are routed to agents with the appropriate skills.
Skills	Associates skills with the invitation. Incoming chat requests that originate from the invitation are routed to agents with ALL the skills that you specify.
Queue	Selects the queue for this invitation.
Enable Queue	Indicates that queuing is enabled, allowing incoming chat requests to wait in a queue until an agent with the appropriate skills is available to accept the chat.
Queue Size Per Agent	Determines the queue's capacity to hold chat requests per available agent. For Live Agent routing or when chats have a size of 1, this is the number of chats allowed to queue for each agent.
Overall Queue Size	Determines the queue's capacity to hold chat requests. For Live Agent routing or when chats have a size of 1, this is the maximum number of chats allowed to queue.

Invitation Animation

Customize your invitation's animations to determine how the animation will appear to customers.

Setting	What It Does
Display Time	Determines how long the invitation will be displayed to customers before it disappears.
Allow invitation to be triggered again after accepting	Indicates whether the invitation can be sent to the customer again after the customer has accepted a previous invitation.
Allow invitation to be triggered again after rejecting	Indicates whether the invitation can be sent to the customer again after the customer has rejected a previous invitation.
Animation	Determines the type of animation for your invitation. Depending on which animation you choose, you'll be prompted to select the positions where the invitation will appear on-screen to customers. 📝 Note: Animations won't render for agents using Internet Explorer versions 9 and below.

Invitation Customization

You can optionally customize your invitation with custom images by associating your deployment with a Salesforce site and its static resources.

Setting	What It Does
Site for Resources	Determines the Salesforce site that's associated with the invitation. By associating your invitation with a Salesforce site, you can customize the invitation with branding images. Store your branding images as static resources with your Salesforce site.
Invitation Image	Sets the custom button graphic that appears for this invitation.
Custom Chat Page	Replaces the standard Live Agent chat window with a custom chat window page that you've developed. Use this option only to use a chat window other than the default chat window that Live Agent provides.
Pre-Chat Form Page	Directs Live Agent to the Lightning Platform page that hosts your customized pre-chat form that customers see before they begin a chat with an agent.
Pre-Chat Form URL	Directs Live Agent to the URL of the Web page that hosts your pre-chat form.
Post-Chat Page	Directs Live Agent to your customized post-chat page that customers see after they complete a chat.
Post-Chat Page URL	Directs Live Agent to the URL of the Web page that hosts your post-chat page.

Sending Rule

Create sending rules for your invitation to determine when to trigger and send the invitation to customers. You can include multiple criteria in your sending rule. Additionally, if your sending rule requires more complicated logic, you can apply Boolean operators to your sending rule.

Setting	What It Does
Criteria	Sets the criteria to be evaluated by the sending rule. For example, you can create a rule that sends the invitation based on how many seconds a customer has been viewing a Web page.
Operator	Sets the operator to evaluate your criteria. For example, you can create a rule that sends the invitation when a customer has been on a page for more than a specified number of seconds.
Value	Sets the value to evaluate the formula against. For example, you can create a rule that sends the invitation when a customer has been on a page for more than 30 seconds.

SEE ALSO:

Chat Routing Options

Create and Assign Live Agent Skills

Chat Queuing Options

Customize Your Live Agent Branding with Salesforce Sites

Pre-Chat Forms and Post-Chat Pages

Pre-Chat Forms and Post-Chat Pages

Pre-chat forms and post-chat pages in Live Agent enable you to exchange information with customers who contact your company through chat.

Pre-chat forms and post-chat pages offer a standardized way of collecting information from customers who contact your company through chat. These forms and pages also offer a standardized way of sharing information with customers after their chat sessions are finished. In addition, by using these forms and pages, you can customize the chat experience for your users.

By using pre-chat forms, you can collect information from a customer, such as a name or a description of a problem, after the customer requests to chat with an agent. This information can help direct chat requests efficiently and can reduce the amount of time that agents need to spend collecting information before beginning a chat session. You can also use this information to customize a customer's experience while the customer chats with an agent, such as including the customer's first name in the chat window.

By using post-chat pages, you can share information with customers at the end of a chat session. For example, you can direct your customers to another Web page after they complete a chat with an agent, and you can forward them to a survey about their chat experience.

You have to create pre-chat forms and post-chat pages programmatically, using Live Agent's APIs. For information on creating customized pre-chat forms and post-chat pages, see the *Live Agent Developer Guide* (English only).

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Create Quick Text Messages

With quick text, users can insert standardized notes, greetings, and answers to common questions without retyping the message each time. Create custom messages for your users to insert when they communicate with customers.

In Setup, add quick text to your app to let your users view the quick text list view.

1. Open Quick Text in your app.

   - In Salesforce Classic, click the **Quick Text** tab.

   - In Lightning Experience, select **Quick Text** from the item picker.

2. Click **New**.

   If you have more than one quick text record type, select a record type for the new message, and then click **Continue**.

3. Enter a message name.

   Use a name that helps users identify when to use this message.

4. Enter the message.

   The message can include line breaks, lists, special characters, merge fields, and up to 4,000 characters.

5. Select the channels in which you want the message to be available.

   Depending on which features are enabled in your org, these channels might be available.

   - Email—the Email action

   - Live Agent—Live Agent in the Service Console

   - Phone—the Log a Call action

   - Portal—a community or a customer portal

   - Internal—works with internal fields, like the Change Status action

   Note: If you don't specify a channel, the quick text message can't be used because it won't be available in any actions.

   The Portal and Internal channels aren't supported in Lightning Experience. These channels display in the picklist but they aren't mapped to any actions in Lightning Experience.

6. Select a category.

   In orgs created before Spring '18 that enabled quick text in Salesforce Classic, this field is required and a default Category is provided for you. In orgs created after Spring '18, this field isn't required.

7. Click **Save**.

   Tip: If you added merge fields, you can preview the quick text data from records that you choose.

SEE ALSO:

Generate Emails From Records

EDITIONS

Available in Salesforce Classic in: **Group**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Available in Lightning Experience in: **Professional**, **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create quick text messages:
- Create, Read, Edit, and Delete on Quick Text

Set Visibility for Live Agent Users

Choose how your Live Agent users can view the Supervisor Tab and Live Agent Sessions using profiles and permission sets.

Set Visibility for the Supervisor Tab through Profiles

The Live Agent supervisor panel is your supervisors' one-stop shop for finding information about their organizations' chat buttons and chat agents. Make the Live Agent supervisor tab visible to users who are assigned to specified profiles.

Set Visibility for the Live Agent Sessions Tab through Permission Sets

Session records store information about your agents' and customers' interactions online, such as how many chat requests were processed, how long agents spent online, or how long agents were actively engaged in chats with customers. Make the Live Agent sessions tab visible to users who are assigned to specified permission sets.

Set Visibility for the Live Agent Sessions Tab through Profiles

Session records store information about your agents' and customers' interactions online, such as how many chat requests were processed, how long agents spent online, or how long agents were actively engaged in chats with customers. Make the Live Agent sessions tab visible to users who are assigned to specified profiles.

Set Visibility for the Supervisor Tab through Profiles

The Live Agent supervisor panel is your supervisors' one-stop shop for finding information about their organizations' chat buttons and chat agents. Make the Live Agent supervisor tab visible to users who are assigned to specified profiles.

1. From Setup, enter `Profiles` in the Quick Find box, then select **Profiles**.

2. Click **Edit** next to the profile that you want to give access to the supervisor tab.

3. Set the visibility of the Live Agent supervisor tab to `Default On`.

4. Click **Save**.

After you give your users permission to access the Live Agent supervisor tab, set up access to the Live Agent supervisor panel in the Salesforce console.

SEE ALSO:

   The Live Agent Supervisor Panel for Salesforce Classic

Set Visibility for the Live Agent Sessions Tab through Permission Sets

Session records store information about your agents' and customers' interactions online, such as how many chat requests were processed, how long agents spent online, or how long agents were actively engaged in chats with customers. Make the Live Agent sessions tab visible to users who are assigned to specified permission sets.

Alternatively, you can give users access to the Live Agent sessions tab through profiles.

1. From Setup, enter `Permission Sets` in the Quick Find box, then select **Permission Sets**.

2. Click the name of a permission set, or create a permission set.

3. Click **Object Settings**.

4. Click **Live Agent Sessions**.

5. Click **Edit**.

6. In Tab Settings, select `Available` and `Visible`.

7. Click **Save**.

SEE ALSO:

    Set Visibility for the Live Agent Sessions Tab through Profiles

    Live Agent Session Records

Set Visibility for the Live Agent Sessions Tab through Profiles

Session records store information about your agents' and customers' interactions online, such as how many chat requests were processed, how long agents spent online, or how long agents were actively engaged in chats with customers. Make the Live Agent sessions tab visible to users who are assigned to specified profiles.

Alternatively, you can give users access to the Live Agent sessions tab through permission sets.

1. From Setup, enter `Profiles` in the Quick Find box, then select **Profiles**.

2. Select a support agent profile.

3. Click **Edit**.

4. Set the visibility of the Live Agent sessions tab to `Default On`.

5. Click **Save**.

SEE ALSO:

Set Visibility for the Live Agent Sessions Tab through Permission Sets

Live Agent Session Records

Set Privacy Options for Live Agent Users

Protect your agents and the customers they assist by blocking sensitive data and unwanted visitors.

Block Sensitive Data in Chats

Sensitive data rules let you block specific patterns, such as credit card, Social Security, phone and account numbers, or even profanity. You can choose to remove the text or replace it with your preferred characters.

Let Your Agents Block Visitors by IP Address

Help your agents avoid troublesome customers by blocking chats from specified IP addresses.

Create an IP Blocking Rule to Block Chat Visitors

Help your agents avoid troublesome customers by blocking chats from specified IP addresses.

Block Sensitive Data in Chats

Sensitive data rules let you block specific patterns, such as credit card, Social Security, phone and account numbers, or even profanity. You can choose to remove the text or replace it with your preferred characters.

1. In Setup, enter `Sensitive Data` in the Quick Find box, then select **Sensitive Data Rules**.

2. Click **New**.

3. Write each pattern as a JavaScript regular expression (regex), and choose your preferred settings. The regex is case-sensitive.

4. Click **Test Your Pattern**.

5. Enter some text in the format of the data you want to block, such as 123-45-6789 for a Social Security number.

6. Preview your results to ensure that the rule is working correctly.

7. Select the roles for which you want to enforce this rule.

8. Click **Save**.

You can block the text from agents, supervisors, customers, or all of these. When a rule is triggered, it logs one or more of these chat transcript events:

- Sensitive data blocked (Agent)
- Sensitive data blocked (Supervisor)
- Sensitive data blocked (Visitor)

> 📝 **Note:** Sensitive data is visible while someone's typing, but it is masked when the person sends it. So if you want to mask customer information from agents, we recommend disabling Agent Sneak Peek (under **Setup** > **Customize** > **Live Agent** > **Live Agent Configurations**).
>
> Sensitive data rules apply to the auto-greeting and any quick text that you have enabled. They don't apply to the agent name or other standard text in the chat window.

Let Your Agents Block Visitors by IP Address

Help your agents avoid troublesome customers by blocking chats from specified IP addresses.

You can enable your agents to block chat requests from specified IP addresses while they work in the console. For example, if a customer is using abusive language or sending spam messages, the agent can block that user from starting a new chat.

An agent action blocks chats from an individual IP address.

Blocked visitors will see a message indicating that chat isn't available.

If a customer attempts to request a chat from a blocked IP address, the chat won't enter a queue, nor will it be routed to agents. In addition, you can modify or delete blocking rules.

1. From Setup in Salesforce Classic, enter `Live Agent Configurations` in the Quick Find box, then select **Live Agent Configurations**.

2. Click **Edit** next to the configuration that you want to modify.

3. Under **Basic Information**, select **Visitor Blocking Enabled**.

4. Click **Save**.

As a Salesforce admin, you can also block individual IP addresses. Or, if your Salesforce org is receiving spam chats from a particular region, you can block entire IP ranges. See Create an IP Blocking Rule for more information.

Create an IP Blocking Rule to Block Chat Visitors

Help your agents avoid troublesome customers by blocking chats from specified IP addresses.

You can block chat requests from specified IP addresses. For example, if a customer is using abusive language or sending spam messages, you can block that user from starting a new chat. If your Salesforce org is receiving spam chats from a particular region, you can block entire ranges of IP addresses.

Blocked visitors will see a message indicating that chat isn't available.

If a customer attempts to request a chat from a blocked IP address, the chat won't enter a queue, nor will it be routed to agents. In addition, you can modify or delete blocking rules.

1. From Setup in Salesforce Classic, enter `Block Visitors` in the Quick Find box, then select **Block Visitors**. For guidelines on entering valid IP ranges, see Set Trusted IP Ranges for Your Organization.

2. Click **New** and fill in the parameters of your Blocking Rule.

3. Click **Save**.

You can also enable your agents to block chat requests from specified IP addresses while they work in the console. See Let Your Agents Block Visitors by IP Address for more information.

Set Up Live Agent in the Salesforce Console

After you set up and customize your basic Live Agent implementation, add it to the Salesforce console so that your agents and supervisors can start using chat to assist customers. Additionally, you can set up some other features in the Salesforce console to create an even more robust chat experience for your agents and your customers.

Add Live Agent to the Salesforce Console in Salesforce Classic

Adding Live Agent to the Salesforce console enables agents and supervisors to chat with customers and access other customer service tools in one place.

Set Up Chat Answers from Knowledge Articles

If your organization uses Salesforce Knowledge, you can enable your agents to answer customer questions by using information from your knowledge base. Set up chat answers on articles so that agents can search for articles from Live Agent in the Salesforce console.

Add the Supervisor Panel to the Salesforce Console

Add the supervisor panel to the Salesforce console in Salesforce Classic to make your support supervisors' work easier. That way, supervisors can access information about their agents without having to switch between workspaces.

Add a Lookup Component for Chats Routed with Omni-Channel to the Salesforce Console

Provide agents with a sidebar lookup component in their Salesforce console so they can quickly look up or create associated records for chats. This component is only for chats using Omni-Channel routing, and can be used in Salesforce Classic only.

SEE ALSO:

Create a Basic Live Agent Implementation

Customize Your Live Agent Implementation

Set Up a Salesforce Console App in Salesforce Classic

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To set up Live Agent:
- Customize Application

To create user profiles or permission sets:
- Manage Profiles and Permission Sets

Add Live Agent to the Salesforce Console in Salesforce Classic

Adding Live Agent to the Salesforce console enables agents and supervisors to chat with customers and access other customer service tools in one place.

Before you add Live Agent to a Salesforce console app, you need to create a Salesforce console app if you don't have one set up.

After you set up Live Agent, add it to a Salesforce console app. After Live Agent is set up in the console, your agents can interact with chat customers. With the Salesforce console, your agents and supervisors can access Live Agent and other Service Cloud products in one place to provide customers fast and efficient customer service.

1. From Setup, enter `Apps` in the Quick Find box, then select **Apps**.

2. Click **Edit** next to the name of the Salesforce console app in which you want to set up Live Agent.

3. Select `Include Live Agent in this App`.

4. Choose the records or pages that you want to open as subtabs of chat sessions in the chat workspace.

5. Optionally, if your Salesforce org has Knowledge enabled, select `Include Suggested Articles from Knowledge in Live Agent` to display the Knowledge One widget in the chat workspace.

6. Click **Save**.

You can run multiple Salesforce apps at the same time. However, if you log in to another Salesforce app while you're logged in to a Salesforce console app, you can't accept new chat requests.

SEE ALSO:

Set Up a Salesforce Console App in Salesforce Classic

Set Up Chat Answers from Knowledge Articles

If your organization uses Salesforce Knowledge, you can enable your agents to answer customer questions by using information from your knowledge base. Set up chat answers on articles so that agents can search for articles from Live Agent in the Salesforce console.

To let agents use the Knowledge One widget to include information from Knowledge articles in chats, add a custom field called "Chat Answer" to article types. This field stores information from the article that's appropriate to share with customers during a live chat. Using this field can be helpful for articles that are too long for an agent to include easily in a response.

> 📝 **Note:** Attaching articles to a chat using the **Share** button is supported only in Salesforce Classic.

Create the custom field as a Text, Text Area, or Text Area (Long). The Rich Text Field option is not supported. Add this custom field to each article type that contains information that you want operators to access from the Knowledge One widget.

1. From Setup, enter `Knowledge Article Types` in the Quick Find box, then select **Knowledge Article Types**.

2. Create or edit an article type.

3. Click **New** in the Fields related list.

4. Select `Text, Text Area,` or `Text Area (Long).`

   Don't select `Text Area (Rich).`

5. Click **Next**.

6. Enter `Chat Answer` in Field Label.

   Make sure that Field Name is populated automatically with Chat_Answer. (You can use a different name for the Field Label.)

7. Click **Next**.

8. Specify security settings, and then click **Next**.

   Make the Chat Answer field visible to authors, editors, and live chat agents. Hide it from portal users or other users who don't need access to it.

9. Select `Yes, add this custom field to the layout,` and then click **Save**.

SEE ALSO:

Create Article Types

Add the Supervisor Panel to the Salesforce Console

Add the supervisor panel to the Salesforce console in Salesforce Classic to make your support supervisors' work easier. That way, supervisors can access information about their agents without having to switch between workspaces.

1. In Setup, enter `Apps` in the Quick Find box, then select **Apps**.

2. Click **Edit** next to the Salesforce console app that you want to add the supervisor panel to.

3. In the Choose Navigation Tab Items section, add `Live Agent Supervisor` to the Selected Items list.

4. Click **Save**.

Add a Lookup Component for Chats Routed with Omni-Channel to the Salesforce Console

Provide agents with a sidebar lookup component in their Salesforce console so they can quickly look up or create associated records for chats. This component is only for chats using Omni-Channel routing, and can be used in Salesforce Classic only.

Before you add a sidebar component to the Salesforce console app, you need:

- A Salesforce console app with Live Agent and Omni-Channel added to it.
- At least one chat button that uses the routing option **Omni**.
- Edit access for Live Chat Transcript granted to agents handling chats routed through Omni-Channel.

1. From Setup, enter `Live Agent` in the `Quick Find` box, then select **Live Chat Transcripts** > **Page Layouts**.

2. Click **Edit** next to the Live Chat Transcript (In Progress) Page Layout.

3. Click **Custom Console Components**.
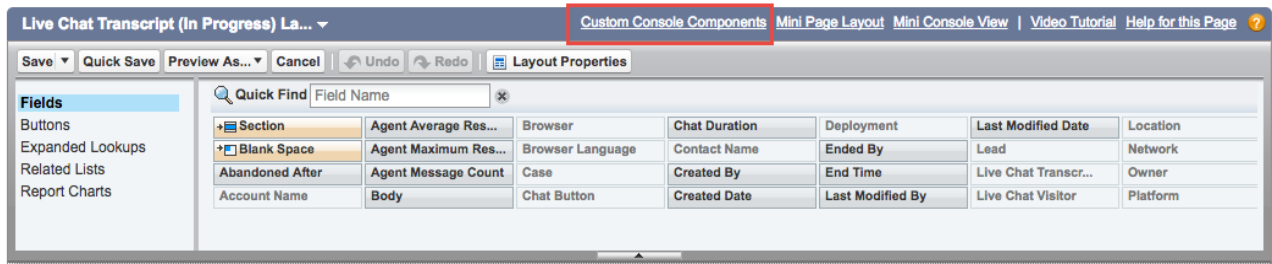
4. Under Primary Tab Components, adjust your objects and other settings. Don't move the component to the left sidebar, as chats appear on the left side.
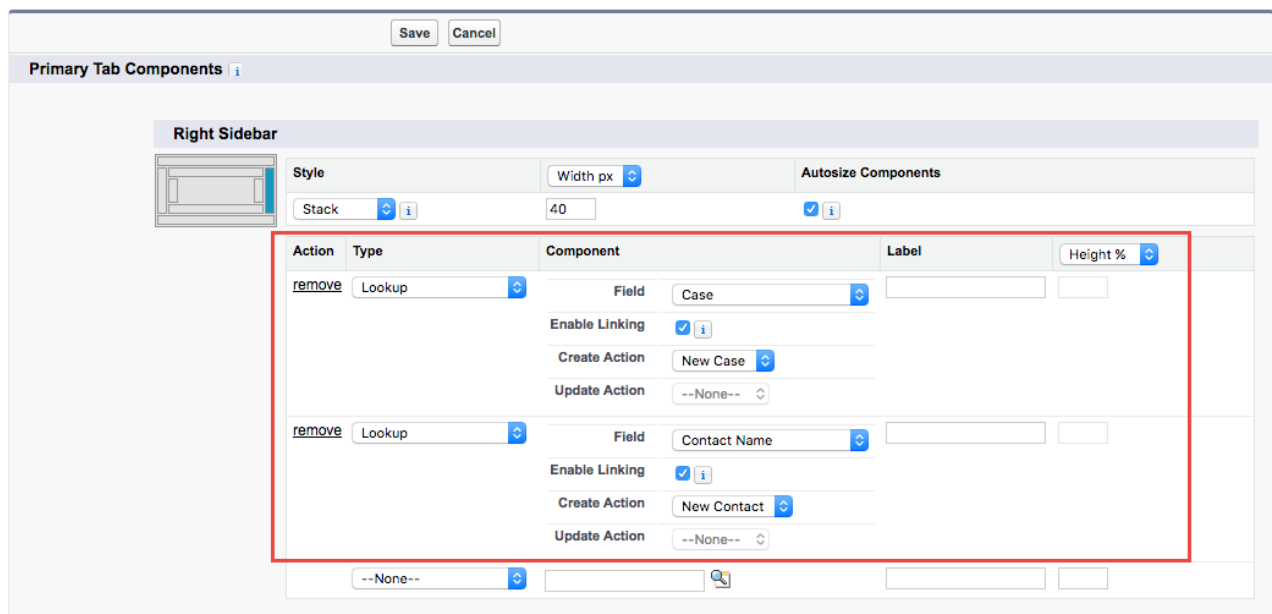
5. Click **Save**.

Agents can now link and unlink records using the sidebar component.

Sidebar Lookup Component with No Linked Records

Sidebar Lookup Component with Linked Contact Record

Live Agent in Lightning Experience

We captured the best of Live Agent and gave it a whole new look and feel in Lightning Experience. You don't even have to regenerate your deployment code if you already use Omni-Channel routing for chats. Live Agent routing isn't supported in Lightning Experience. Instead, you must route chats with Omni-Channel to chat in Lightning Experience.

Meet the New Agent Chat Window

Agents get a larger chat window so they have more room to use the chat features they know and love. There's also a new chat header that helps agents jump in and out of their chats seamlessly.
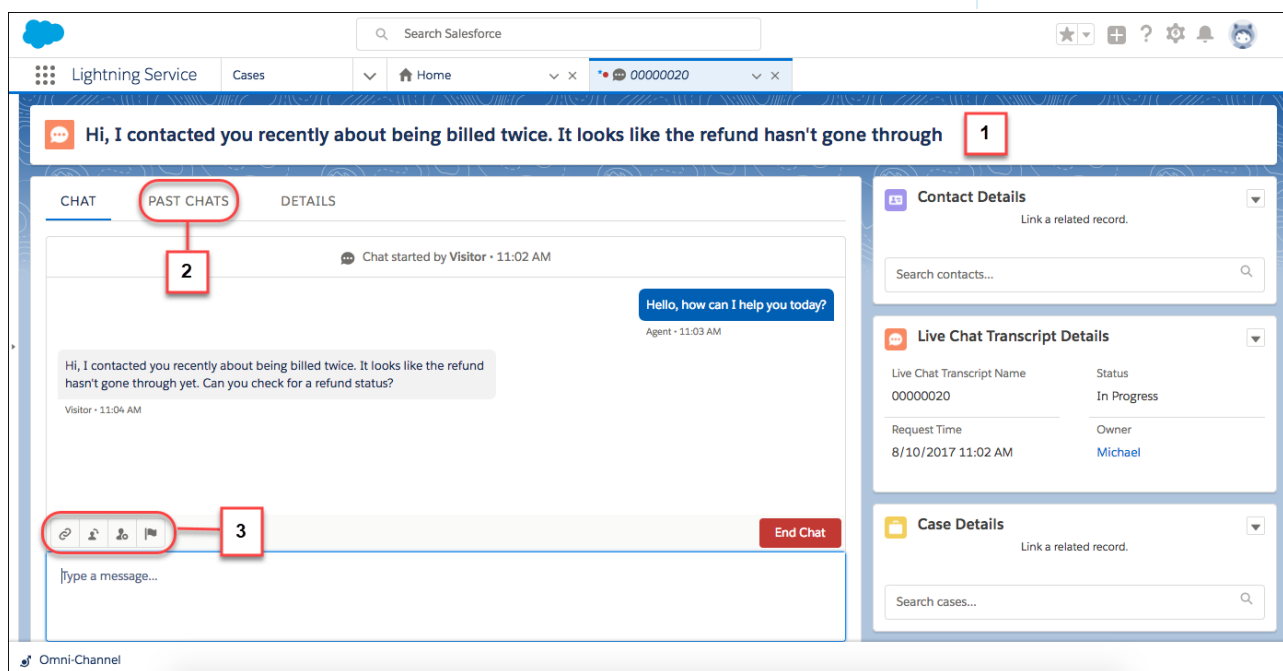
The larger chat area is in the center of the console by default. The first 100 characters of the customer's message appear in the chat header, so agents can quickly differentiate between all their in-progress chats (1). The Past Chats tab is included in the default layout so agents can quickly refer to previous chats with a customer (2). An enhanced toolbar with popovers contains all the chat features your agents already know and love (3).

You can control the placement and height of the agent chat window, too. Place the Chat Body component wherever you want in the console by opening a chat transcript record and editing the live page. Or, you can create a custom record page in Lightning App Builder. Then, you can keep the default height of 500px or change it to whatever fits your agents' screens best.

Your agents can use Past Chats to get instant context while they're chatting with a customer. Past Chats uses the contact record attached to a chat to find previous chats with the same customer. Agents can't see any records attached to the previous chats, but they can read the full transcripts. Your default transcript record home has past chats already included as a tab component with the chat body. You can easily place the component directly on the page so your agents can keep it visible all the time.
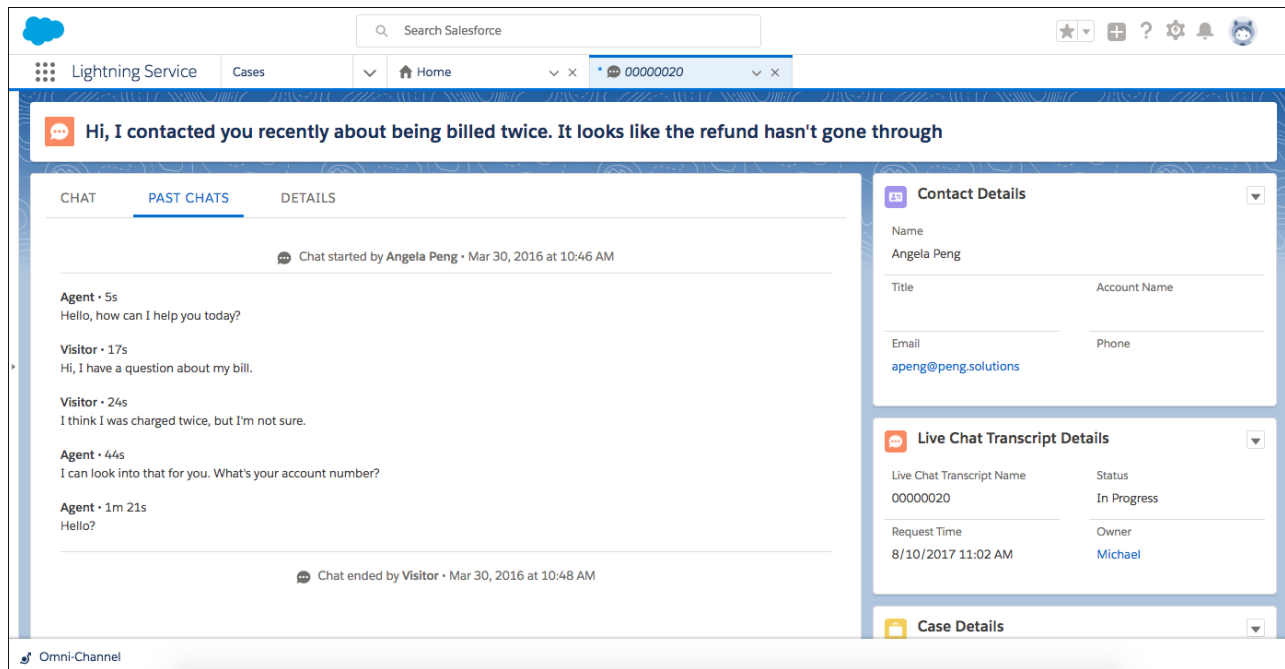
Popovers Immerse Agents in Live Agent Features

The enhanced toolbar uses popovers to improve agents' workflow when using chat features. The popovers provide a similar experience to Salesforsce Classic, but the file transfer and chat transfer features use waiting screens. These waiting screens let agents know when they're waiting for the visitor or their team to respond.

The popovers can be closed without canceling the process. Agents can use the close button or click the icon again to hide the popover. To cancel the action, they can reopen the popover and use the cancel button.

Add Live Agent to the Console in Lightning Experience

Add Live Agent to a Lightning console app so agents and supervisors can chat with customers.

Feature Gaps and Expected Behavior for Live Agent in Lightning Experience

Live Agent looks and functions differently in Lightning Experience. The following feature gaps and expected behavior can help your agents adjust to the changes.

Add Live Agent to the Console in Lightning Experience

Add Live Agent to a Lightning console app so agents and supervisors can chat with customers.

Before you add Live Agent to a Lightning console app, you need to enable Live Agent and create a basic implementation. You need to create a Lightning console app for service if you don't have one set up. You also need to have Omni-Channel set up along with a chat button or Snap-ins Chat implementation using Omni-Channel routing.

1. From Setup in Lightning Experience, enter *Apps* in the Quick Find box, then select **App Manager**.

2. Click the dropdown next to the console app you want to add Live Agent to, then click **Edit**.

3. If your console doesn't have the Omni-Channel utility, go to Utility Bar and add it.

4. Under Selected Items, add Live Chat Transcripts to the Selected Items list.

5. Under Assign to User Profiles, select the profiles you want to add to this console.

6. Click **Save**.

7. Click **Done**.

Feature Gaps and Expected Behavior for Live Agent in Lightning Experience

Live Agent looks and functions differently in Lightning Experience. The following feature gaps and expected behavior can help your agents adjust to the changes.

The following feature gaps apply for Live Agent in Lightning Experience:

- You must route chats with Omni-Channel to chat in Lightning Experience. Make sure that you have Omni-Channel ready for Lightning Experience and have set up your chat button to route with Omni-Channel.

  - Considerations for Omni-Channel routing for chats apply. See Compare Live Agent and Omni-Channel Routing for Chats for more information.

- Chat features aren't available in Omni-Channel Supervisor. Support supervisors can use Live Agent Supervisor in Salesforce Classic for chat monitoring features, even when agents are using Omni-Channel routing. Create a skill for agents handling chats routed with Omni-Channel, and their chats appear in Live Agent Supervisor alongside chats routed with Live Agent routing.

- Live Agent settings, including the Live Agent and Omni-Channel setup pages, are available only in Salesforce Classic.

- Hovering over a chat request doesn't show custom details in Lightning Experience.

- The visual indications for when a tab contains an active chat, when there's an unread message, and when the Critical Wait Alert Time has passed are different in Lightning Experience than in Salesforce Classic:

- – A blue asterisk appears on a chat tab that contains an active chat in Lightning Experience. In Salesforce Classic, a black asterisk appears on a chat tab that contains an active chat.
- – A red dot appears in the chat tab in Lightning Experience when a customer sends a message that the agent hasn't read yet because the agent is on a different tab. In Salesforce Classic, the tab turns yellow.
- – A red dot appears in the chat tab in Lightning Experience when an agent hasn't responded to a chat by the time specified in the Critical Wait Alert Time setting. In Salesforce Classic, the tab turns red.

- The Recently Viewed Pages list view isn't available in Lightning Experience.
- Console API methods for Live Agent aren't supported with Omni-Channel routing or with Lightning Experience.
- File previewing isn't used with File Transfer in Lightning Experience. Instead, files are downloaded to the agent's computer.
- Agents can encounter Unsupported Item tabs when opening Live Agent records that aren't yet supported in Lightning Experience. They can view these records in Salesforce Classic.
- When chatting with customers, we recommend that you open Live Chat Transcripts as primary tabs, not subtabs. Don't set custom navigation rules for Live Chat Transcripts if you plan to chat.

Expected behavior for the Lightning Knowledge component:

- You can use the Lightning Knowledge component with chat by adding the Knowledge component to the page layout. Agents can manually search for articles by entering keywords into the Knowledge component search bar and can view articles in a subtab.
- The Knowledge component doesn't automatically search for articles by keywords used in the chat in Lightning Experience.
- Knowledge keyword searches using the Live Agent prechat form and deployment API aren't supported in Lightning Experience.
- Agents can't use the **Share** button to attach articles to chats in Lightning Experience. As a workaround, agents can copy and paste the text from the article into the chat.

Expected behavior for file transfer:

- File transfer still requires a record attached to the chat transcript. If the currently attached records aren't right, the agent uses a lookup field to search for records by object type or creates a record.
- The uploaded file is displayed as a link in the chat. When the agent clicks the link, the file is downloaded based on the browser settings.
- Files are attached to records in the same way as in Salesforce Classic, using Attachments instead of Salesforce Files. Agents can find the file from the Files related list on the related record.
- File previews aren't available.

Expected behavior for chat transfer:

- The receiving agent can't preview the message from the first agent in the Omni-Channel utility. Agents can view the message only after accepting the transfer.
- The receiving agent can see the transcript with the first agent, just like in Salesforce Classic. But, the chat bubbles from the previous agent are displayed in a different color in Lightning Experience, which helps the receiving agent navigate the chat.

Use Omni-Channel with Your Existing Live Agent Implementation

Are you loving Live Agent 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: Salesforce Classic, Lightning Experience

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

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

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

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

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

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

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

Available in: Salesforce Classic, Lightning Experience

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

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 Live Agent for the first time, or when you create a chat button that uses the routing option **Omni**.

Let's compare the two routing model options when using Live Agent 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. Un-routed Omni-Channel items 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.
Chat supervisors use the Live Agent Supervisor Panel to observe chats and assist agents with their chats.	Chat supervisors can view agent activity in Omni-Channel Supervisor, but they use the Live Agent Supervisor Panel to observe chats and assist agents with their chats. You must create a skill for agents handling chats routed with

Live Agent Routing (Salesforce Classic only)	Omni-Channel Routing
	Omni-Channel to make them visible in the Live Agent Supervisor Panel.
Reports and data for chats are separate from Omni-Channel data.	Chat data is included in Agent Work reports in addition to Live Agent reports.
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. They have the option to do this on the chat transcript itself or use a console sidebar lookup component in Salesforce Classic.
Uses the Console Integration Toolkit Methods for Live Agent.	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.

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.
- You can't use direct-to-agent routing with chats routed by Omni-Channel.
- You can't use chat conferencing with chats routed by Omni-Channel.
- Queues with multiple object types can cause problems when using Omni-Channel routing for chats. We recommend creating a queue for each object type, such as Chats, Cases, and Leads, instead of setting queues to handle multiple object types.
- Chats routed with Omni-Channel can't use supervisor whisper messages and assistance flags with Omni-Channel Supervisor.
- 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 is because Omni-Channel changes ownership of the chat transcript when the transfer is initiated, before the chat is accepted by the next agent.

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