

Chat for Administrators

Salesforce, Summer '19



CONTENTS

- [Chat for Administrators](#) 1
- Create a Basic Implementation 2
- Customize Your Implementation 23
- Set Up Chat in the Salesforce Console in Salesforce Classic 35
- Use Omni-Channel with Your Existing Chat Implementation 41
- [Index](#) 45

CHAT FOR ADMINISTRATORS

Welcome to Chat for administrators! With Chat, 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 Chat for your users, including agents and support supervisors. Chat 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: [▶ Chat Configuration \(Salesforce Classic\)](#) (English only)

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

[Create a Basic Chat Implementation](#)

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

[Customize Your Chat Implementation](#)

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

[Set Up Chat in the Salesforce Console in Salesforce Classic](#)

After you set up and customize your basic Chat 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.

[Use Omni-Channel with Your Existing Chat Implementation](#)

Are you loving Chat 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:

[Chat for Support Agents \(Salesforce Classic\)](#)

[Chat for Support Supervisors \(Salesforce Classic\)](#)

EDITIONS

Chat is available in:
Salesforce Classic and
Lightning Experience

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

Chat is available in:
Unlimited Edition and
Enterprise Edition with the
Service Cloud

USER PERMISSIONS

To set up Chat:

- [Customize Application](#)

To create user profiles or
permission sets:

- [Manage Profiles and
Permission Sets](#)

Create a Basic Chat Implementation

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

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

USER PERMISSIONS

To set up Chat:

- Customize Application

To create user profiles or permission sets:

- Manage Profiles and Permission Sets

Watch a Demo: [Chat Configuration \(Salesforce Classic\)](#) (English only)

1. [Enable Chat](#)

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

2. [Create Chat Users](#)

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

3. [Create and Assign Chat 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 Chat routing for chats only.

4. [Create Chat Configurations](#)

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

5. [Create Chat Deployments](#)

A deployment is a place on your company's website that's enabled for Chat. Create deployments to implement Chat 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 Chat Branding with Salesforce Sites](#)

To customize your Chat implementation with branding images, use a Salesforce Site to upload the images for your chat window and chat buttons.

SEE ALSO:

[Customize Your Chat Implementation](#)

[Add Chat to the Salesforce Console](#)

Enable Chat

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

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

USER PERMISSIONS

To enable Chat:

- Customize Application

1. From Setup in Salesforce Classic, enter *Chat Settings* in the Quick Find box, then select **Chat Settings**.
2. Select **Enable Chat**.
3. Click **Save**.

Create Chat Users

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

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

USER PERMISSIONS

To create or edit users:

- Manage Internal Users

To enable agents to use Chat:

- API Enabled administrative permission

All Chat users need the **API Enabled** administrative permission enabled on their associated profile before they can use Chat.

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 **Chat User**. If you don't see this checkbox, verify that your support organization has purchased enough Chat feature licenses.
4. Click **Save**.

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

Permissions for Chat Support Agents

Enable a few specific permissions for Chat support agents so that they have access to the tools that they need to provide help to customers.

[Permissions for Chat Support Supervisors](#)

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

SEE ALSO:

[Create Chat Configurations](#)

[Profiles](#)

[Create and Assign Chat Skills](#)

Permissions for Chat Support Agents

Enable a few specific permissions for Chat support agents so that they have access to the tools that they need to provide help to customers.

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

General Permissions

Necessary Permission	Description
"API Enabled"	Required for all Chat users

Object Permissions

Record Type	Permission	Description	Considerations
Chat 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.
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.

Record Type	Permission	Description	Considerations
Quick Text	"Read"	Enables agents to view quick text messages and include quick text in chats.	Without the "Read" permission on quick text, agents can't access the quick text sidebar in the Salesforce console.
	"Create"	Enables agents to create quick text messages	If you want to standardize quick text messages across your organization, limit your agents' ability to create quick text messages. In that case, give the "Create" permission to support supervisors instead.
	"Edit"	Enables agents to edit quick text messages	If you want to standardize quick text messages across your support organization, limit your agents' ability to edit quick text messages. In that case, give the "Edit" permission to support supervisors instead.
	"Delete"	Enables agents to delete quick text messages	If you want to standardize quick text messages across your organization, limit your agents' ability to delete quick text messages. In that case, give the "Delete" permission to support supervisors instead.

SEE ALSO:

[Chat Session Records](#)[Chat Transcripts](#)[Chat Visitor Records](#)[Edit Object Permissions in Profiles](#)

Permissions for Chat Support Supervisors

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

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

General Permissions

Necessary Permission	Description
"API Enabled"	Required for all Chat users

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

Object Permissions

Record Type	Permission	Description	Considerations
Chat 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 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.

Record Type	Permission	Description	Considerations
Live Chat Visitors	"Read"	Enables supervisors to view visitor records	None
	"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:

[Chat Session Records](#)[Chat Transcripts](#)[Chat Visitor Records](#)[Edit Object Permissions in Profiles](#)

Create and Assign Chat 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 Chat routing for chats only.

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud


USER PERMISSIONS

To create skills:

- Customize Application

To assign skills (supervisors):

- Assign Chat Skills to Users

 **Note:** The Skill object is visible to all users. No user permissions are needed to view skills.

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 Chat 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 > Chat Skills** and update the assigned profiles or users under each skill.

Create Chat Configurations

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

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

USER PERMISSIONS

To create and edit configurations:

- Customize Application

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.

Chat configurations enable you to control your users' access to certain Chat features. You can create multiple configurations that define Chat'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 *Chat Configurations* in the Quick Find box, then select **Chat Configurations**.
2. Click **New**.
3. Choose the settings for your Chat configuration.
4. Click **Save**.

[Chat Configuration Settings](#)

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

[Supported Browsers for Chat Notifications](#)

Chat 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 Chat Users](#)

Chat Configuration Settings

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

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012


Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

Apply settings when you create or edit a Chat configuration.

Basic Information

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

Setting	What It Does
Chat 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.


Setting	What It Does
Custom Agent Name	Sets the agent's name in the chat window.
Auto Greeting	<p>Sets a customized greeting message that the customer receives automatically when an agent accepts the customer's chat request.</p> <p>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.</p> <p> Note: If you specify an automatic greeting message in both your Chat 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.</p>
Auto Away on Decline	<p>Sets the agent's Chat status to "Away" automatically when the agent declines a chat request.</p> <p>This option applies only when agents are assigned to chat buttons that use Chat push routing.</p>
Auto Away on Push Time-Out	<p>Sets an agent's Chat status to "Away" automatically when a chat request that's been pushed to the agent times out.</p> <p>This option applies only when agents are assigned to chat buttons that use Chat push routing.</p>
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 the Chat console. The Chat console is no longer supported, so we don't recommend setting up chatlets. But don't worry—if you use Chat in the Salesforce console, you don't need chatlets.

Assign Users

Assign eligible users to the configuration to give them access to Chat 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 Chat configuration at a time. If you assign the same user to a second Chat configuration, the system removes that user from the first Chat configuration without warning you. So make sure that you know exactly which Chat configuration each user should be assigned to!

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

Supervisor settings determine the Chat 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	<p>Determines the default agent status, such as Online, Offline, or Away, by which to filter agents in the supervisor panel.</p> <p>When supervisors view the Agent Status list in the supervisor panel, they see a list of agents who have that status.</p>
Default Skill Filter	<p>Determines the default skill by which to filter agents in the supervisor panel.</p> <p>When supervisors view the Agent Status list in the supervisor panel, they see a list of agents who are assigned to that skill.</p>
Default Button Filter	<p>Determines the default button by which to filter agents in the supervisor panel.</p> <p>When supervisors view the Agent Status list in the supervisor panel, they see a list of agents who are assigned to that button.</p>

Setting	What It Does
Assigned Skills	<p>Determines the skills that are visible to supervisors in the supervisor panel.</p> <p>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.</p>

Chat Conference Settings (Chat 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	<p>Determines the skill groups to which agents can transfer chats.</p> <p>Agents can transfer chats to available agents who are assigned to those skills.</p>
Chat Transfer to Live Chat Buttons Enabled	Indicates whether agents can transfer chats to a button or queue.
Chat Transfer to Live Chat Buttons	<p>Determines the buttons to which agents can transfer chats.</p> <p>Agents can transfer chats to available agents who are assigned to those buttons.</p>

SEE ALSO:

[The Chat Supervisor Panel for Salesforce Classic](#)
[Agent Status List](#)

Supported Browsers for Chat Notifications

Chat 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.

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

Two types of chat notifications are available in Chat.

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 Chat; 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®	11	Yes	No

Create Chat Deployments

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

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

USER PERMISSIONS

To create deployments:

- Customize Application

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 Chat 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.



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

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 Chat. 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.

Chat Deployment Settings

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

Permitted Domains and Chat Deployments

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

SEE ALSO:

[Customize Your Chat Branding with Salesforce Sites](#)

Chat Deployment Settings

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

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012


Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

Apply settings when you create or edit a Chat deployment.

Basic Information

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

Setting	What It Does
Live Chat Deployment Name	Names the deployment. This deployment name, or a version of it, automatically becomes the <code>Developer Name</code> .
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.

Setting	What It Does
Allow Access to Pre-Chat API	<p>Indicates whether developers can access and implement the pre-chat API.</p> <p> 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.</p>
Permitted Domains	<p>Determines the domains that can host the deployment.</p> <p>When using permitted domains:</p> <ul style="list-style-type: none"> 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. 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 <code>Enable Custom Timeouts</code> 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 <code>Enable Custom Timeouts</code> is selected.

Chat Window Branding

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

Setting	What It Does
Branding Image Site	<p>Determines the Salesforce Site that's associated with the deployment.</p> <p>By associating your deployment with a Salesforce Site, you can customize your deployment with branding images. Store your branding images as static resources with your Salesforce Site.</p>
Chat Window Branding Image	Sets the custom graphic that appears in the customer's chat window.

Setting	What It Does
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 Chat Branding with Salesforce Sites](#)

[Permitted Domains and Chat Deployments](#)

Permitted Domains and Chat Deployments

To enhance security and minimize the number of illegitimate chat requests that you receive, use the permitted domains option when you create Chat 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 Chat Deployments](#)

Create Chat Buttons

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

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

USER PERMISSIONS

To create and customize chat buttons:

- Customize Application

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 Chat. 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 Chat enable you to specify how incoming chat requests are directed to agents.

[Chat Queuing Options](#)

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

SEE ALSO:

[Create and Assign Chat Skills](#)

[Customize Your Chat Branding with Salesforce Sites](#)

Chat Button Settings

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

Available in: Salesforce Classic


Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012


Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

Apply settings when you create or edit a chat button.

Basic Information

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

Setting	What It Does
Type	<p>Determines the type of button that you want to create.</p> <p> Warning: When you create a chat button to host on your website, you must set this option to Chat Button.</p>
Name	<p>Names the chat button.</p> <p>This button name, or a version of it, automatically becomes the <code>Developer Name</code>.</p>

Setting	What It Does
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)	<p>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.</p> <p>The warning disappears (and the timer stops) each time the customer sends a message.</p> <p>The warning disappears (and the timer resets to 0) each time the agent sends message.</p> <p>The warning value must be shorter than the time-out value (we recommend at least 30 seconds).</p>
Custom Agent Name	Sets the agent's name in the chat window.
Auto Greeting	<p>Sets a customized greeting message that the customer receives automatically when an agent accepts the customer's chat request.</p> <p>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.</p> <p> Note: If you specify an automatic greeting message in both your Chat 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.</p>

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 Chat routing or when chats have a size of 1, this setting controls the number of chats allowed to queue for each agent.

Setting	What It Does
Overall Queue Size	Determines the queue's capacity to hold chat requests. For Chat 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 all available agents have declined 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 the first available agent automatically accept chat requests originating from this button.

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 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.
Pre-Chat Form Page	Directs Chat 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 Chat to the URL of the web page that hosts your pre-chat form. Specify an absolute URL.
Post-Chat Page	Directs Chat to your customized post-chat page that customers see after they complete a chat.
Post-Chat Page URL	Directs Chat to the URL of the web page that hosts your post-chat page. Specify an absolute URL.

SEE ALSO:

[Customize Your Chat Branding with Salesforce Sites](#)

[Chat Routing Options](#)

[Chat Queuing Options](#)

[Pre-Chat Forms and Post-Chat Pages](#)

Chat Routing Options

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

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

Routing Option	Description
Choice	Incoming chat requests are added to the queue in Chat 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.
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-Channel Queues	Incoming chats are routed to agents using Omni-Channel queues. You must route chats with Omni-Channel if you want to use Chat in Lightning Experience.
Omni-Channel Skills	Incoming chats are routed to agents using Omni-Channel skills. Apex code or flows are not required. When you set up the Chat button, simply select the required skills. Omni-Channel sends Chats from that button to agents with those skills.

Chat Queuing Options

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

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

For each 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	<ul style="list-style-type: none"> • 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 Chat widget. • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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

Queuing Option	With This Routing Option	Results
		<p>see the offline version of the button until older chat sessions have ended.</p> <ul style="list-style-type: none">• 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 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	<ul style="list-style-type: none">• 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 Chat Branding with Salesforce Sites

To customize your Chat implementation with branding images, use a Salesforce Site to upload the images for your chat window and chat buttons.

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

USER PERMISSIONS

To create and edit Salesforce Sites:

- Customize Application

To customize your chat window and chat buttons, you need to create one or more Salesforce 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 Salesforce Site to host your images.

When you create a Salesforce Site for your Chat 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 image is 50 pixels.

SEE ALSO:

[Create and Edit Salesforce Sites](#)

[Defining Static Resources](#)

[Create Automated Chat Invitations](#)

[Create Chat Deployments](#)

Customize Your Chat Implementation

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

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

USER PERMISSIONS

To set up Chat:

- [Customize Application](#)

To create user profiles or permission sets:

- [Manage Profiles and Permission Sets](#)

[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 Chat enable you to exchange information with customers who contact your company through chat.

[Create Quick Text Messages](#)

Create custom predefined messages to insert into emails, chats, tasks, events, and more. Quick text can include merge fields, line breaks, and special characters.

[Set Visibility for Chat Users](#)

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

[Set Privacy Options for Chat Users](#)

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

SEE ALSO:

[Create a Basic Chat Implementation](#)[Add Chat to the Salesforce Console](#)

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.

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

USER PERMISSIONS

To create and customize automated chat invitations:

- [Customize Application](#)

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 Chat. 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 Chat Skills](#)[Customize Your Chat Branding with Salesforce Sites](#)[Create Chat 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.

Available in: Salesforce Classic


Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012


Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

Apply settings when you create or edit an automated chat invitation.

Basic Information

Configure the basic functionality that's available on a particular 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 <code>Developer Name</code> .
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.

Setting	What It Does
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) 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 in the chat window.
Auto Greeting	<p>Sets a customized greeting message that the customer receives automatically when an agent accepts the customer's chat request from an invitation.</p> <p>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.</p> <p> Note: If you specify an automatic greeting message in your Chat configuration and in an invitation, the message that's associated with your invitation will override the message that's associated with your configuration.</p>

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 Chat routing or when chats have a size of 1, this is the number of chats allowed to queue for each agent.

Setting	What It Does
Overall Queue Size	Determines the queue's capacity to hold chat requests. For Chat 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	<p>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.</p> <p> Note: Animations won't render for agents using Internet Explorer versions 9 and below.</p>

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 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.
Pre-Chat Form Page	Directs Chat 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 Chat to the URL of the Web page that hosts your pre-chat form.

Setting	What It Does
Post-Chat Page	Directs Chat to your customized post-chat page that customers see after they complete a chat.
Post-Chat Page URL	Directs Chat 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 Chat Skills](#)

[Chat Queuing Options](#)

[Customize Your Chat 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 Chat enable you to exchange information with customers who contact your company through chat.

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

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 Chat's APIs. For information on creating customized pre-chat forms and post-chat pages, see the [Chat Developer Guide](#) (English only).

Create Quick Text Messages

Create custom predefined messages to insert into emails, chats, tasks, events, and more. Quick text can include merge fields, line breaks, and special characters.


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 standard navigation apps, click the **Quick Text** tab.
 - In console navigation apps, 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 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.

 **Note:** Quick text supports the Salesforce Merge Language (SML) used in Salesforce Classic email templates, not the Handlebars Merge Language (HML) used in Lightning Experience email templates.
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—for Email actions
 - Event—for Event actions
 - Internal—works with internal fields, like on the Change Status action*
 - Knowledge—for Knowledge articles in Lightning Experience
 - Chat—works with Chat in the Service Console
 - Phone—for the Log a Call action

EDITIONS

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

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

USER PERMISSIONS

To create quick text messages:

- Create, Read, Edit, and Delete on quick text

 **Note:** In Salesforce Classic apps, quick text is supported with Case Feed Log a Call actions in console apps.

- Portal—works in a community or a customer portal*
- Social—for social posts
- Task—for Task actions

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

 **Important:** If you don't specify a channel, the quick text message can't be used because it isn't available in an action.

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. Select a folder.

Folders help you organize and share quick text. You can create up to four levels of folders: one root folder and up to three subfolders.

This field is visible only when **Share and organize quick text in folders** is enabled. In some orgs, the Folder field must be added to the page layout.

8. If you use merge fields, click **Preview** to review the message with data from records that you choose.

9. Click **Save**.

SEE ALSO:

[Generate Emails From Records](#)

Set Visibility for Chat Users

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

[Set Visibility for the Supervisor Tab through Profiles](#)

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

[Set Visibility for the Chat 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 Chat sessions tab visible to users who are assigned to specified permission sets.

[Set Visibility for the Chat 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 Chat sessions tab visible to users who are assigned to specified profiles.

EDITIONS

Chat is available in:
Salesforce Classic and
Lightning Experience

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

Chat is available in:
Unlimited Edition and
Enterprise Edition with the
Service Cloud

Set Visibility for the Supervisor Tab through Profiles

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

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

USER PERMISSIONS

To set tab visibility for Chat features:

- Manage Profiles and Permission Sets

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 Chat supervisor tab to `Default On`.
4. Click **Save**.

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

SEE ALSO:

[The Chat Supervisor Panel for Salesforce Classic](#)

Set Visibility for the Chat 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 Chat sessions tab visible to users who are assigned to specified permission sets.

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

USER PERMISSIONS

To set tab visibility for Chat features:

- Manage Profiles and Permission Sets

Alternatively, you can give users access to the Chat 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 **Chat Sessions**.
5. Click **Edit**.
6. In Tab Settings, select `Available` and `Visible`.

7. Click **Save**.

SEE ALSO:

[Set Visibility for the Chat Sessions Tab through Profiles](#)
[Chat Session Records](#)

Set Visibility for the Chat 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 Chat sessions tab visible to users who are assigned to specified profiles.

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

USER PERMISSIONS

To set tab visibility for Chat sessions:

- [Manage Profiles and Permission Sets](#)

Alternatively, you can give users access to the Chat 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 Chat sessions tab to `Default On`.
5. Click **Save**.

SEE ALSO:

[Set Visibility for the Chat Sessions Tab through Permission Sets](#)
[Chat Session Records](#)

Set Privacy Options for Chat 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.

EDITIONS

Chat is available in:
Salesforce Classic and
Lightning Experience

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

Chat is available in:
Unlimited Edition and
Enterprise Edition with the
Service Cloud

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.

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

USER PERMISSIONS

To create sensitive data rules:

- Customize Application

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



Note: Sensitive Data Rules are shared between Chat and Messaging. You can edit rules in either Chat or Messaging but they are enforced in both.

2. Click **New** or **New Sensitive Data Rule**.
3. Write each pattern as a JavaScript regular expression (regex), and choose your preferred settings. The regex is case-sensitive.
4. Optionally, test your pattern.
 - a. Enter some text in the format of the data you want to block, such as 123-45-6789 for a Social Security number.
 - b. Preview your results to ensure that the rule is working correctly.
5. Select the roles for which you want to enforce this rule.




Note: Rules are enforced on the author. Therefore, if a don't show phone number is enforced on the visitor, when visitors enter their phone numbers, agents and supervisors can't see it.

6. Set a priority for the rule. Lower numbers are executed first.

7. 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 > Chat > Chat 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.

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

USER PERMISSIONS

To chat with visitors in Chat in the Salesforce console:

- Chat is enabled, set up, and included in a Salesforce console app

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 can block chats from an individual IP address.

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

If a customer attempts to request a chat from a blocked IP address, the chat is canceled. In addition, you can modify or delete blocking rules.

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

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

USER PERMISSIONS

To chat with visitors in Chat in the Salesforce console:

- Chat is enabled, set up, and included in a Salesforce console app

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

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 see a message indicating that chat isn't available.

If a customer attempts to request a chat from a blocked IP address, the chat is canceled. In addition, you can modify or delete blocking rules.

1. From Setup, 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 Chat in the Salesforce Console in Salesforce Classic

After you set up and customize your basic Chat 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.

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

USER PERMISSIONS

To set up Chat:

- **Customize Application**

To create user profiles or permission sets:

- **Manage Profiles and Permission Sets**

[Add Chat to the Salesforce Console](#)

Adding Chat 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 Chat 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 Chat Implementation](#)[Customize Your Chat Implementation](#)[Set Up a Salesforce Console App in Salesforce Classic](#)

Add Chat to the Salesforce Console

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

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

USER PERMISSIONS

To add Chat to the Salesforce console:

- **Customize Application**

Before you add Chat 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 Chat, add it to a Salesforce console app. After Chat is set up in the console, your agents can interact with chat customers. With the Salesforce console, your agents and supervisors can access Chat 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 Chat.
3. Select **Include Chat 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 Chat** 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 Chat in the Salesforce console.

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

USER PERMISSIONS

To set up the Knowledge One widget:

- Customize Application
- AND
- Manage Knowledge

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.

Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

USER PERMISSIONS

To set up Chat and manage apps:

- Customize Application

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 *Chat 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.

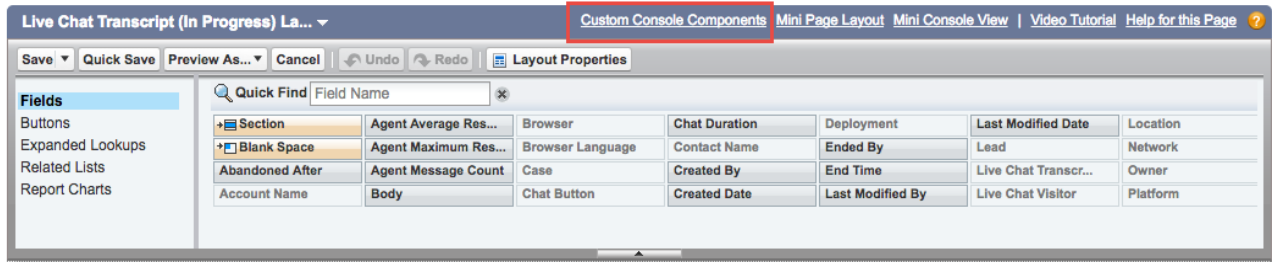
Available in: Salesforce Classic

Available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

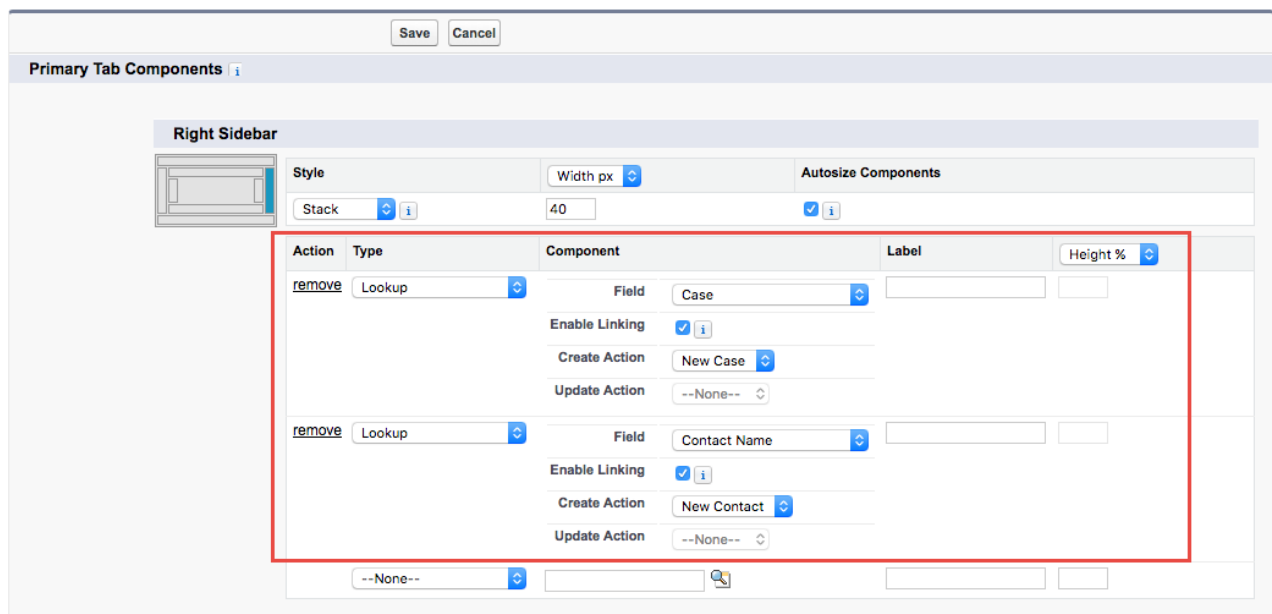
Available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

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

- A Salesforce console app with Chat 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 *Chat* 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**.



- 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.



- Click **Save**.

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

Sidebar Lookup Component with No Linked Records

The screenshot displays the Salesforce Live Chat Transcript interface for transcript ID 00000192. The interface includes a chat window on the left, a central transcript detail pane, and a right sidebar with three lookup components: Contact Lookup, Widget Lookup, and Case Lookup. All three components show "No [Entity] Is Linked" with search bars, indicating no records are currently linked to this transcript.

Live Chat Transcript Detail

Field	Value	Field	Value
Live Chat Transcript Name	00000192	Status	In Progress
Request Time	8/8/2016 4:18 PM	Deployment	First Deployment
Queue	Chat Queue - Queue Disabled	Chat Button	Omni Auto-Accept
Primary Skill		Owner	Keenan Pepper

Custom Details

Field	Value	Field	Value
CheckboxDetail	true	EmailDetail	john.doe@e.com
FirstNameDetail	John	LastNameDetail	Doe

Attached Records

Case	Account Name
Contact Name	Lead

Visitor Details

Field	Value	Field	Value
Live Chat Visitor	00000004	Browser	Chrome 51.0.2704.106
Location	Unknown, Unknown, Unknown	Browser Language	en-US
Visitor IP Address	10.3.36.89	Platform	MacOSX
Referring Site		Screen Resolution	1440x900
Network	Unknown	User Agent	Mozilla/5.0 (Macintosh; Intel Mac OS X 10_11_6) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/51.0.2704.106 Safari/537.36

Recently Viewed Pages

Current Page

Omni-Channel

Sidebar Lookup Component with Linked Contact Record

The screenshot displays the Salesforce Live Chat Transcript interface for transcript ID 00000192, now with a linked contact record. The Contact Lookup component in the sidebar shows "Mr. Harry Potter" as the linked contact. The Case Lookup component also shows a linked record with "Harry Potter" as the contact name. The transcript details and visitor information remain the same as in the previous screenshot.

Live Chat Transcript Detail

Field	Value	Field	Value
Live Chat Transcript Name	00000192	Status	In Progress
Request Time	8/8/2016 4:18 PM	Deployment	First Deployment
Queue	Chat Queue - Queue Disabled	Chat Button	Omni Auto-Accept
Primary Skill		Owner	Keenan Pepper

Custom Details

Field	Value	Field	Value
CheckboxDetail	true	EmailDetail	john.doe@e.com
FirstNameDetail	John	LastNameDetail	Doe

Attached Records

Case	Account Name
Contact Name	Lead

Visitor Details

Field	Value	Field	Value
Live Chat Visitor	00000004	Browser	Chrome 51.0.2704.106
Location	Unknown, Unknown, Unknown	Browser Language	en-US
Visitor IP Address	10.3.36.89	Platform	MacOSX
Referring Site		Screen Resolution	1440x900
Network	Unknown	User Agent	Mozilla/5.0 (Macintosh; Intel Mac OS X 10_11_6) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/51.0.2704.106 Safari/537.36

Recently Viewed Pages

Current Page

Omni-Channel

Use Omni-Channel with Your Existing Chat Implementation

Are you loving Chat 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 Chat and Omni-Channel in tandem. That's great! Once everything's set up, you'll find that the two work together in perfect harmony.

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

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

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

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

If you have Chat enabled but don't have an implementation, when you enable Omni-Channel, Salesforce creates a Chat 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 Chat 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 Chat and Omni-Channel Routing for Chats](#)

See the benefits and limitations of using Omni-Channel routing for chats or keeping Chat routing for chats. If you want to use Chat in Lightning Experience, you must use Omni-Channel routing.

[Manage Chat Capacity with Omni-Channel](#)

If your support organization has been using Chat for a while, you know that you can select an agent's maximum number of chats by using the `Chat Capacity` field. When Omni-Channel is enabled in your Salesforce org, however, you need to manage your agent's chat capacity using Omni-Channel configurations instead.

EDITIONS

Chat is available in: Salesforce Classic and Lightning Experience

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

Chat is available in: **Unlimited** Edition and **Enterprise** Edition with the Service Cloud

Compare Chat and Omni-Channel Routing for Chats

See the benefits and limitations of using Omni-Channel routing for chats or keeping Chat routing for chats. If you want to use Chat 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 Chat for the first time, or
- You create a chat button that uses the routing option **Omni-Channel Queues** or **Omni-Channel Skills**

Let's compare the two routing model options when using Chat and Omni-Channel together.

Chat 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. Omni-Channel work items that haven't yet been routed 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.
Supervisors use the Chat 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 Chat Supervisor Panel to observe chats and assist agents with their chats. Create a skill for agents

EDITIONS

Chat is available in:
Salesforce Classic and
Lightning Experience

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

Chat is available in:
Unlimited Edition and
Enterprise Edition with the
Service Cloud

Chat Routing (Salesforce Classic only)	Omni-Channel Routing
	handling chats routed with Omni-Channel to make them visible in the Chat Supervisor Panel.
Reports and data for chats are separate from Omni-Channel data.	Chat data is included in Agent Work reports in addition to Chat reports.
For a queue to appear as an option on the Chat button, the queue must include the Chat Sessions object in its support objects.	For a queue to appear as an option on the Chat button, the queue must include the Live Chat Transcript object in its supported objects.
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. Agents can associate records on the chat transcript itself or use a console sidebar lookup component in Salesforce Classic.
Uses the Console Integration Toolkit Methods for Chat .	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.
If you use the <code>findOrCreate</code> code to find or create related records, the code triggers only when an agent accepts the chat request.	If you use the <code>findOrCreate</code> code to find or create related records, the code triggers even if the chat visitor cancels the chat before the agent accepts.

However, there are a few limitations to using Omni-Channel routing for chats:

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

Manage Chat Capacity with Omni-Channel

If your support organization has been using Chat for a while, you know that you can select an agent's maximum number of chats by using the `Chat Capacity` field. When Omni-Channel is enabled in your Salesforce org, however, you need to manage your agent's chat capacity using Omni-Channel configurations instead.

Omni-Channel lets your call center route incoming work items—including cases, leads, or custom objects—to available agents in your support organization. With Chat routing, you could route chats to agents in real time. With Omni-Channel, you can extend this capability to other objects.

Chat routing and Omni-Channel routing differ in one important way: With Omni-Channel, you can enable agents to receive chats and other kinds of objects. For example, you might have a group of agents who can accept chats and incoming cases in real time, all in the Salesforce console. You can control all of these settings with presence configurations. Presence configurations, like Chat configurations, let you set your agents' capacity to receive these work items, including chats.

When you enable Omni-Channel, we create a Default Presence Configuration for you. All agents, chat or otherwise, are assigned to this configuration unless you create a customized configuration and assign users to it. First, decide whether you're using the Default Presence Configuration or a custom one to manage your agents' chat capacity. If your chat agents can accept work items for other objects, make sure that you factor that into the new capacity that you assign to them. After you've decided what the appropriate capacity is for the agents who are assigned to that configuration, edit the configuration's capacity.

1. From Setup, enter *Presence Configurations* in the `Quick Find` box, then select **Presence Configurations**.
2. Click **Edit** next to the presence configuration that's associated with your chat agents.
3. Change the capacity to the maximum number of work items, including chats, that an agent can take on at a time.
4. Click **Save**.

EDITIONS

Chat is available in:
Salesforce Classic and
Lightning Experience

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

Chat is available in:
Unlimited Edition and
Enterprise Edition with the
Service Cloud

USER PERMISSIONS

To set up Omni-Channel:

- Customize Application

INDEX

A

Automated chat invitations
 create [24](#)
automated invitation
 settings [25](#)

B

Buttons
 Chat [16](#)

C

Chat
 add to Salesforce console [35](#)
 add to the Salesforce console [38](#)
 add to the Salesforce Console [36](#)
 agent permissions [4–5](#)
 automated chat invitations [24](#)
 automated invitation [25](#)
 basic implementation [2](#)
 chat button [17](#)
 chat buttons [19–20](#)
 configuring [8–9](#)
 creating buttons [16](#)
 creating users [3](#)
 customize implementation [23](#)
 deployment [14](#)
 deployments [13, 16](#)
 enabling with Omni-Channel [41–42](#)
 permitted domains [16](#)
 post-chat page [28](#)
 pre-chat form [28](#)
 queueing options [20](#)
 routing options [19](#)
 Salesforce console [8](#)
 sessions [31–32](#)
 Sessions tab [31–32](#)
 set up [2, 23, 35](#)
 setting up [37](#)

Chat (*continued*)
 settings [9](#)
 transfer chats [34](#)
chat button
 settings [17](#)
Chat configurations
 settings [9](#)
Chat deployment
 settings [14](#)
Chat Sessions tab
 permission sets [31](#)
 profiles [32](#)
Chat user
 creating [3](#)
Chatt
 enabling [3](#)

D

deployment
 settings [14](#)
deployments
 Chat [13](#)

E

Enabling
 Chat [3](#)

K

Knowledge One widget
 setting up [37](#)

O

Omni-Channel
 enabling with Chat [41–42](#)

S

Salesforce console
 Chat configurations [8](#)
 configuring [8](#)