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# Streamline Sales and Service with the Salesforce Console

Salesforce, Winter '16





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# STREAMLINE SALES AND SERVICE WITH THE SALESFORCE CONSOLE

## Salesforce Console

A Salesforce console is designed to boost productivity for users in fast-paced environments.

Watch a Demo: [▶ Introducing the Salesforce Console](#)

The console's dashboard-like interface reduces clicking and scrolling so that you can quickly find, update, or create records. Use a console to easily access data and features you use most. For example, support agents can use multiple applications at once and keep the context of cases as priorities change. Sales reps can immediately contact leads, assess companies, identify key contacts, and access sales intelligence. You can set up a console for service or sales.

The console's tab-based interface makes it easy for you to see records and their related items on one screen, and work on multiple items simultaneously.

### EDITIONS

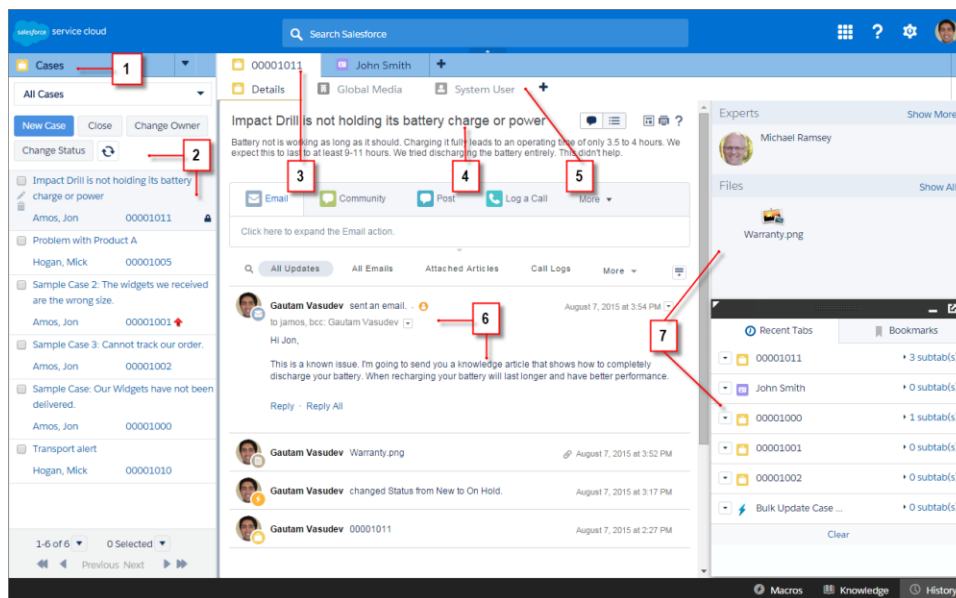
Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud


Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

Salesforce Console User Interface



(1) Select objects and records from the navigation tab. (2) Records display in a list, which you can pin at the left of the top of the screen. (3) Selected records appear as primary tabs, and tabs let you work on several items at once. (4) A highlights panel shows key information related to records. (5) Records related items appear as subtabs, and subtabs let you quickly switch between related information without losing context. (6) View and interact with content in the feed or detail area. (7) Access custom component data in sidebars and footers.

Administrators can customize a console to determine everything from the objects in the navigation tab, to whether you can place phone calls with a SoftPhone. More customizations can include displaying knowledge base articles alongside cases, creating custom actions with keyboard shortcuts, or chatting with customers over the Web with Live Agent (Service Cloud only). Administrators and developers can solve more unique business problems with custom console components, and use code with an API named the Salesforce Console Integration Toolkit, to add third-party integrations, or expand console customizations to new levels.

 **Tip:** If you're already using a console for service, you can create a console for sales without purchasing separate licenses.

 **Note:** The Salesforce console improves upon the Agent console by providing you with more options and more advanced technologies.

SEE ALSO:

[Salesforce Console Limitations](#)

[Prepare to Set up a Salesforce Console](#)

## Salesforce Console Limitations

Learn about display, access, and customization limitations for a console.

### Display Limitations

A Salesforce console is only available in Microsoft® Internet Explorer® 7, 8, 9, 10, or 11; Mozilla® Firefox® 3.5 and above, and the most recent stable version of Google Chrome™. Some console features are unavailable in Internet Explorer versions 7 and 8 because they require more advanced browser performance and recent Web technologies.

Unavailable in Internet Explorer 7	Unavailable in Internet Explorer 8
Pinned tabs	Pinned tabs
Bookmarks	Bookmarks
History component	History component
Multi-monitor components	Most Recent Tabs component
The resizable highlights panel	
Most Recent Tabs component	
Multiple custom console components on sidebars	
The full-width feed option on feed-based page layouts	
Vertical auto-sizing for stacked console components in sidebars	

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

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**Unavailable in Internet Explorer 7****Unavailable in Internet Explorer 8**


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Font and font color for console components' `Button` CSS

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 **Tip:** For best performance, we recommend that console users adopt the Google Chrome™ browser and machines with 8 GB of RAM.

A console offers limited support for right-to-left languages, such as Arabic or Hebrew. Since right-to-left languages aren't fully supported, some features don't appear as expected in a console, such as Case Feed, Live Agent, and Salesforce Knowledge. The console doesn't support right-to-left languages in Internet Explorer 7 or 8, as Salesforce no longer supports those browsers.

All Salesforce CRM Content items display as primary tabs in a console.


When using Social Accounts, Contacts, and Leads, the Social Viewer window doesn't align properly within a console.

Record home pages, including their standard Tools sections, don't display in a console.

**Behavior and Access Limitations**

Back buttons on browsers are not supported for a console and don't work as expected.

A Salesforce console doesn't meet accessibility requirements.

Visualforce pages don't refresh when you click  and select **Refresh all primary tabs** or **Refresh all subtabs**.

You can't directly edit the fields on the highlights panel; however, when you change those fields on a record, the highlights panel is automatically updated.

Some objects haven't been fully adapted to a console, such as reports, dashboards, and Chatter. These and other objects are marked with an asterisk (\*) in the console setup area and might cause unexpected behaviors. For example: (1) When viewing opportunity splits, clicking **Cancel** doesn't close the subtab; instead, the page detail information is opened in a subtab; (2) opportunity line items and quote line items don't automatically refresh when changed—you might need to refresh the page to see the latest changes.

If you leave a console and return to it, any subtabs that were displayed might not automatically reload. Also, if you leave a console by selecting an app from the Force.com app menu, your browser's **Back** and **Forward** buttons might not work as expected.

If you save changes in a lookup component, and you have unsaved changes in another lookup component, the unsaved changes are lost without a warning message.

If you click a custom link or a link in a text field, such as <http://www.salesforce.com/> in a case `Description`, the link appears in a popup window instead of a tab.

If you refresh the Change Case Status page in a console, an `Unable to Access Page` error appears.

**Customization Limitations**

A console doesn't support Chatter Messenger or the App Launcher.

Some Visualforce pages won't display correctly in a console unless they're updated to show in it.

If you enable clickjack protection for Visualforce pages in your organization's security settings, Visualforce pages won't work correctly.

Call center users can only use a SoftPhone in a Salesforce console if they're using a CTI adapter built with version 3.0 or 4.0 of the CTI Toolkit; or if they're using a call center built with Open CTI.

Live Agent is only available for a console with the Service Cloud.

The highlights panel for Live Agent Transcripts is editable, but you can't turn it on for users.

SEE ALSO:

[Salesforce Console](#)

# Set Up a Salesforce Console

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## Prepare to Set up a Salesforce Console

Before you set up a console, determine if it's for service or sales.

A Salesforce console is a type of custom app that you can customize for support agents or sales reps. You can set up multiple consoles in your organization as long as you don't exceed your edition's custom apps limit. For example, you can set up one console for customer service, and another for telesales. Consoles for service and sales are almost identical, except that consoles for service can include Live Agent—a Web chat tool for support agents and customers.

As you prepare to set up a console, think about who will use it and what information they access most. For each console, determine which objects are available to users, which fields users should quickly spot in highlights panels, and which licenses you should assign to users so that they can access various Salesforce features. You should also think about which records display as primary tabs and subtabs.

Pick the center of your business process as a primary tab, and related items as subtabs. For example, you might set accounts as a primary tab, and cases and contacts as subtabs. When you set up a console, we recommend giving it a name that represents its function so that users can easily recognize it. For example, Customer Service Desk.



**Tip:** If you are assigned the Service Cloud User feature license, you can review and customize an out-of-the-box console by selecting Sample Console from the Force.com app menu.

### SEE ALSO:

[Salesforce Console Implementation Tips](#)

[Set up a Salesforce Console for Service](#)

[Set up a Salesforce Console for Sales](#)

[Salesforce Console](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost



# Salesforce Console Implementation Tips

Before you implement a console, review these tips.

## General Implementation Tips

A console respects all of the security and sharing settings in your Salesforce organization.

For best performance, we recommend that console users adopt the Google Chrome™ browser and machines with 8 GB of RAM.

Even if the new user interface theme isn't enabled for your organization, console users still see the new interface on all pages inside a console.

To see any setup changes to a console, you must refresh your browser.

You can't add a console to customer portals or partner portals.

## Salesforce Console for Service Implementation Tips

To use a console for service, users must be assigned the Service Cloud User feature license.

To use Live Agent in a console, users must be assigned the Live Agent User feature license.

If Salesforce Knowledge is set up, turn on the Knowledge sidebar so that console users can automatically see relevant articles alongside any cases that they're working on.

## EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.


Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud


Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

## Set up a Salesforce Console for Service

Create and customize a console app, then assign the Service Cloud User feature license to users.

 **Important:** If you plan to add Live Agent to a console, set it up completely before you set up your console.

1. [Customize highlight panels for all objects](#) and [turn them on](#).
2. [Create a console app and assign it to user profiles](#).
3. Optionally, for support agents:
  - [Brand your console](#).
  - [Choose how pinned lists display](#).
  - [Whitelist domains](#).
  - [Customize push notifications](#).
  - [Customize keyboard shortcuts](#).
  - [Turn on the Knowledge Sidebar](#).
  - [Set up interaction logs and assign them to user profiles](#).
  - Turn on Live Agent (available only for a console for service).
4. [Assign users the Service Cloud User feature license](#).

 **Tip:** To add third-party integrations, or expand console customizations to new levels, advanced administrators and developers can create console components, or use code with an API named the Salesforce Console Integration Toolkit.

SEE ALSO:

- [Assign the Service Cloud Feature License to Users](#)
- [Salesforce Console Implementation Tips](#)
- [Prepare to Set up a Salesforce Console](#)
- [Salesforce Console Configurable Features](#)

## Assign the Service Cloud Feature License to Users

Available in: **Enterprise, Performance, Unlimited**, and **Developer** Editions with the Service Cloud

The Service Cloud User feature license entitles users to additional Salesforce features, such as the Salesforce console.

To assign the license to a user:

1. From Setup, enter `users` in the `Quick Find` box, then select **Users**.
2. Click **Edit** next to a user's name.
3. Select `Service Cloud User`.

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited**, and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To set up a Salesforce console for Service:

- "Customize Application"

### USER PERMISSIONS

To assign the Service Cloud User feature license to users:

- "Manage Internal Users"

4. Click **Save**.

## SEE ALSO:

[Set up a Salesforce Console for Service](#)

## Set up a Salesforce Console for Sales

To enable a console for the first time, contact Salesforce then assign users the correct permission set license and user permissions.

1. To have the console for sales enabled for your organization, contact Salesforce.
2. [Customize highlight panels for all objects](#) and [turn them on](#).
3. Assign the Sales Console User permission set license to users.
4. [Enable the "Sales Console" permission on the permission set](#).
5. Assign users to the permission set. You can only assign users with a Sales Console User permission set license to permission sets that include the "Sales Console" permission.
6. Optionally, for sales reps:
  - [Brand your console](#).
  - [Choose how pinned lists display](#).
  - [Whitelist domains](#).
  - [Customize push notifications](#).
  - [Customize keyboard shortcuts](#).
  - [Turn on the Knowledge Sidebar](#).
  - [Set up interaction logs](#) and [assign them to user profiles](#).
7. [Create a console app and assign it to user profiles](#).



**Tip:** To add third-party integrations, or expand console customizations to new levels, advanced administrators and developers can create console components, or use code with an API named the Salesforce Console Integration Toolkit.

## SEE ALSO:

[Enable the Sales Console User Permission for a Salesforce Console](#)  
[Salesforce Console Implementation Tips](#)  
[Prepare to Set up a Salesforce Console](#)  
[Salesforce Console Configurable Features](#)

### EDITIONS

Available in: **Salesforce Classic**

Available in: **Performance** and **Developer** editions

Available in: **Enterprise** and **Unlimited** editions for an extra cost

### USER PERMISSIONS

To assign permission set licenses:

- "Manage Internal Users"

To create a Salesforce Console for Sales:

- "Customize Application"
- AND
- "Sales Console"

## Enable the Sales Console User Permission for a Salesforce Console

After users are licensed for the Salesforce Console for Sales, add the `Sales Console` permission to a permission set.

1. From Setup, enter `Permission Sets` in the `Quick Find` box, then select **Permission Sets**.
2. Create a permission set. When creating the permission set, select the user license type `None`. If another license types is selected, you won't be able to add the `Sales Console` user permission for this permission set.
3. On the Permission Set page, click **App Permissions**.
4. Select the `Sales Console` permission and click **Save**.

SEE ALSO:

[Set up a Salesforce Console for Sales](#)

## Turn on Salesforce Console Highlights Panels

To display highlights panels in a console, you must turn them on.

1. Edit any page layout and click **Layout Properties**.
2. Check `Highlights Panel`, and click **OK**.
3. Click **Save**.

SEE ALSO:

[Set up a Salesforce Console for Service](#)

[Set up a Salesforce Console for Sales](#)

[Configure Highlights Panels for a Salesforce Console](#)

[Highlights Panel Fields and Format](#)

### EDITIONS

Available in: Salesforce Classic

Available in: **Performance** and **Developer** editions

Available in: **Enterprise** and **Unlimited** editions for an additional cost

### USER PERMISSIONS

To create permission sets:

- "Manage Users"

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To customize page layouts:


- "Customize Application"


To view page layouts:

- "View Setup"

## Configure Highlights Panels for a Salesforce Console

The highlights panel is a customizable table of up to four columns at the top of every primary tab in a console. It helps console users see key information at a glance.

To edit a highlights panel, hover over the panel on any page layout and click  or double-click the panel. To add or change fields, click the appropriate column and select fields from the `Top Field` and `Bottom Field` lists. If the fields you want to add aren't listed, you must first add them to the detail page layout. Fields can appear once on each highlights panel, and fields already in use appear as gray in the field selection list. Highlights panel don't support rich text area (RTA) fields, custom long-text area fields, or the Transcript object.

To remove fields, click the appropriate column and select `-None-` from the field lists. To add columns, click **Add Column**. To remove columns, hover over the column and click .

To save highlights panel changes, click **OK** in the Highlights Panel Properties dialog box. When you've finished editing the page layout, click **Save**. To display highlights panels in a console, you must turn them on.

 **Important:** If you leave a page layout before clicking **Save**, you'll lose your highlights panel changes.

### SEE ALSO:

[Turn on Salesforce Console Highlights Panels](#)  
[Highlights Panel Fields and Format](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To customize page layouts:

- "Customize Application"

To view page layouts:

- "View Setup"

## Highlights Panel Fields and Format

Before you configure a highlights panel for a Salesforce console, review these formatting rules.

A highlights panel can include any standard or custom fields that've already been added to a page layout. Each panel can have a minimum of one column of fields and a maximum of four columns. Each column can have one or two fields in top or bottom positions.

When users see a highlights panel, top fields appear in bold and in a larger font than bottom fields. Users can only see fields that they have permission to view—otherwise fields appear blank. When both fields appear blank in a column, the column appears blank.

### SEE ALSO:

[Configure Highlights Panels for a Salesforce Console](#)

[Turn on Salesforce Console Highlights Panels](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To customize page layouts:

- "Customize Application"

To view page layouts:

- "View Setup"

## Create a Salesforce Console App

To create a console, administrators must create a console app.



[Walk Through It \(Requires the “Sales Console” user permission or the Service Cloud User license\)](#)

Watch a Demo: [Prepare to Set up a Salesforce Console](#)

Each console is a custom app that users select from the Force.com app menu. The number of console apps you can create is based on your organization’s custom app limits.

1. From Setup, enter `Apps` in the `Quick Find` box, then select **Apps**, then click **Next**.
2. Click **New**, select `Console`, and click **Next**. Optionally, to copy an existing console, click **Clone** on the console’s detail page. Save a console that you’ve copied before you can update its cloned push notifications or keyboard shortcuts.
3. Type a label for the app, then click **Next**. The label can have a maximum of 40 characters, including spaces. This label is the app’s name in the Force.com app menu.
4. Optionally, add a custom logo. Click **Insert an image**, choose a file image from the document library, then click **Next**.
5. Select the items to include in the navigation tab, then click **Next**. You can’t add the following to the navigation tab: forecasts, ideas, answers, connections, portals, console, activities (tasks and events), the App Launcher, or buttons for customizing your organization. Tab visibility settings, and the `Overwrite users' personal tab customizations` setting, don’t apply to the navigation tab. For example, you can access `Accounts` from the navigation tab even if `Accounts` are Tab Hidden on user profiles.
6. Choose how items that aren’t selected from a primary tab or subtab display, then click **Next**. For example, choose whether cases display as primary tabs or as subtabs on parent records when selected from list views, search results, or screen pops. Click:
  - `As a primary tab` to display the object’s records as primary tabs.
  - `As a subtab of` to display the object’s records as subtabs. From the drop-down list, choose the parent record where the subtabs appear. For example, if you want cases to appear as subtabs on contacts, select `Contact Name (Contact)` in the `Cases` row. If parent records don’t apply, subtabs appear as primary tabs. For example, if you make campaigns a subtab of leads but a lead doesn’t belong to a campaign, that campaign appears as a primary tab.
7. Optionally, if your organization has Service Cloud and Live Agent, select `Include Live Agent in this App`, and click **Next**. If you choose to include a chat workspace for Live Agent in your console, you can:
  - Choose records or pages to open as subtabs of chat sessions.
  - Select `Include Suggested Articles from Salesforce Knowledge in Live Agent` to display the articles tool in the chat workspace.
8. Assign the Salesforce console to user profiles:
  - a. Check the `Visible` box to choose the user profiles for which the app is available.
  - b. Check the `Default` box to set the app as that profile’s default app, meaning that new users with the profile see this app the first time they log in. Profiles with limits are excluded from this list.
9. Click **Save**.

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud

Available in: **Performance and Developer** Editions with the Sales Cloud

Available in: **Enterprise and Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To view apps:

- “View Setup and Configuration”

To manage apps:

- “Customize Application”

 **Tip:** To see any setup changes to a console, refresh your browser.

## SEE ALSO:

[Set up a Salesforce Console for Service](#)

[Set up a Salesforce Console for Sales](#)

[Brand a Salesforce Console](#)

## Configure a Salesforce Console

### Salesforce Console Configurable Features

An administrator must turn on and configure most console features to determine how you view and work with data.

Feature	Automatically Enabled?	Available in a Console for Sales	Available in a Console for Service
<a href="#">Highlights Panel</a>		✓	✓
<a href="#">Brand a Console</a>		✓	✓
<a href="#">Pinned Lists</a>	✓	✓	✓
<a href="#">Save User Sessions</a>	✓	✓	✓
<a href="#">Bookmarks and Recent Tabs</a>	✓	✓	✓
<a href="#">Keyboard Shortcuts</a>	✓	✓	✓
<a href="#">Multi-Monitor Components</a>	✓	✓	✓
<a href="#">Console Components</a>		✓	✓
<a href="#">Whitelist Domains</a>		✓	✓
<a href="#">Push Notifications</a>		✓	✓
<a href="#">Interaction Logs</a>		✓	✓
<a href="#">Softphone Integration</a>		✓	✓
<a href="#">Knowledge Sidebar</a>		✓	✓
<a href="#">Knowledge One Footer</a>		✓	✓
<a href="#">Live Agent</a>			✓

#### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

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#### USER PERMISSIONS

Configure a Salesforce Console for Service:

- "Customize Application"

Salesforce Console for Sales:

- "Customize Application"

AND

"Sales Console User"

## SEE ALSO:

[Salesforce Console](#)



## Choose How Lists Display in a Salesforce Console

Administrators can change how lists appear to console users.

In a console, you can display lists in one of three ways:

List Type	Description
Full screen, unpinned	Lists are visible only when the navigation tab is selected. When you select a record from the list, it opens in a new tab.
Pinned to top	Lists appear at the top of the page and are always visible. When you select a record from the list, it opens in a new tab below the list.
Pinned to left	Lists appear on the left side of the page and are always visible. When you select a record from the list, it opens in a new tab to the right of the list.

To change how lists display:

1. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
2. Select a console app.
3. Click **Edit**.
4. Choose how you want lists to display. If you choose pinned lists, specify a default size, in pixels or percentage of screen space.
5. Click **Save**.

SEE ALSO:

- [Salesforce Console Configurable Features](#)
- [Salesforce Console](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

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### USER PERMISSIONS

To choose how lists display:


- “Customize Application”

## Save User Sessions for a Salesforce Console

Administrators can save user sessions so that when you close your browser or log out of Salesforce, you can quickly return to what you were working on when you log in again.

If a console is set up, user sessions are automatically saved so that when you log in again, the following appear: any previously open console tabs, custom console components, resized sidebar components, an open or closed search header, and interaction logs.

1. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
2. Select a console app.
3. Click **Edit**.
4. If user sessions aren't saved, click *Save User Sessions*.
5. Click **Save**.

 **Note:** Console uses the browser `sessionStorage` property to retain tabs until a user closes them. If a user logs out of Salesforce and logs in again using the same window, the previously open tabs reopen in the new session, even when *Save User Sessions* is disabled.

### SEE ALSO:

- [Salesforce Console Configurable Features](#)
- [Salesforce Console](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To save user sessions for a Salesforce console:

- "Customize Application"

## Turn on the History Component for a Salesforce Console

If a console is set up, you can add the History component to the footer so that users can quickly access recent primary tabs or bookmarks without having to search Salesforce.

 **Note:** With Summer '15, Most Recent Tabs was renamed History and bookmarks were added to it to give you a more streamlined experience for finding and retrieving tabs. These features aren't available in Internet Explorer® 7 and 8.

1. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
2. Select a Salesforce console app.
3. Click **Edit**.
4. In *Choose Console Components*, add History to *Selected Items*.
5. In *Align Custom Console Component*, choose whether the component will appear in the footer's right or left side.
6. Click **Save**.

### SEE ALSO:

[Salesforce Console Configurable Features](#)  
[Salesforce Console](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

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### USER PERMISSIONS

To turn on the History component:

- "Customize Application"


## Customize Keyboard Shortcuts for a Salesforce Console

Create or customize keyboard shortcuts so that users can quickly perform actions by pressing keys instead of having to use a mouse.


If a console is set up, several default keyboard shortcuts are automatically turned on and available for customization. For example, pressing keys to open and close tabs, move between tabs, and save records. Before you can create custom shortcuts, a developer must define the shortcut's action with the `addEventListener()` method in the Salesforce Console Integration Toolkit. You can only create shortcuts for actions performed inside of a console.

1. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
2. Click **Edit** next to a Salesforce console app.
3. Click **Customize keyboard shortcuts**.
4. Click **Edit** on the top of the page.
5. Click **Edit** to customize an existing shortcut, or click **+Add Keyboard Shortcut** to create a new one. When creating a new shortcut, you must add a `Console Event Name`, which is a unique identifier for the key commands, and then send the event name to the developer who defined the shortcut's action so that he or she can add it to the method that will trigger the shortcut. You can't delete the default shortcuts, but you can edit or deactivate them.
6. Click **Save**.

After you customize or create shortcuts, notify users assigned to a console about the new actions they can perform.

 **Note:** You can have up to 144 shortcuts for each console, which includes the default shortcuts and any that you create. If you create or customize keyboard shortcuts that include standard browser shortcuts, such as CTRL+F, your shortcuts might not work as intended.

Keyboard shortcuts aren't case sensitive, even when you press SHIFT before a letter key. For example, SHIFT+b is the same as SHIFT+B. If CTRL, ALT, or SHIFT is in a keyboard shortcut, the sequence of those keys doesn't matter. For example, CTRL+ALT+A is the same as ALT+CTRL+A.

 **Tip:** You can include as many keys in a shortcut as you want, but we recommend that you limit a shortcut to three keys so that users can remember it. Console users can press SHIFT+K to view an overlay with a list of all console shortcuts.

### SEE ALSO:

- [Default Keyboard Shortcuts for a Salesforce Console](#)
- [Salesforce Console Configurable Features](#)
- [Salesforce Console](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To customize keyboard shortcuts for a Salesforce console:


- "Customize Application"


## Turn on Multi-Monitor Components for a Salesforce Console

If a console is set up, multi-monitor components are turned on so that you can move portions of a console to different areas of your screens to help you work best.

With multi-monitor components, you can pop out primary tabs or Open CTI SoftPhones from browsers and drag them across multiple monitors. You can also move the History component, Live Agent chats (but not the footer component), and any console components included in a console's footer.

1. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
2. Select a console app.
3. Click **Edit**.
4. If multi-monitor components are turned off, click *Enable Multi-Monitor Components*.
5. Click **Save**.

 **Note:** Popped out items close and lose their positions on screen when you log out of Salesforce, click **Setup**, click a link to leave a console, or refresh or close browsers.

 **Tip:** To pop out components, you might need to update these settings in your browser: (1) allow popup windows; (2) set links to open in new windows, not tabs.

### SEE ALSO:

- [Salesforce Console Configurable Features](#)
- [Salesforce Console](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To turn on multi-monitor components:

- "Customize Application"

## Whitelist Domains for a Salesforce Console

Administrators can let console users access domains outside of Salesforce. For example, you can add `www.example.com` to a console's whitelist so that console users can access that domain.

1. From Setup, enter `Apps` in the `Quick Find` box, then select **Apps**.
2. Select a console app.
3. Click **Edit**.
4. In `Whitelist Domains`, type the domains you want users to access, and separate multiple domains by commas. You don't need to add `http://` or `https://` because those are part of a URL, not a domain.
5. Click **Save**.

SEE ALSO:

[Salesforce Console Configurable Features](#)  
[Salesforce Console](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To whitelist domains for a Salesforce console:

- "Customize Application"

## Configure Push Notifications for a Salesforce Console

Administrators can set up push notifications in a console so that users can see when a record they're working on has been changed by others.

Push notifications are visual indicators on lists and detail pages in a console that show when a record or field has changed during a user's session. For example, if two support agents are working on the same case, and one agent changes the `Priority`, a push notification appears to the other agent so he or she spots the change and doesn't duplicate the effort.

Choose when push notifications appear and which objects and fields trigger them:

1. From Setup, enter `Apps` in the `Quick Find` box, then select **Apps**.
2. Select a console app, and click **Edit**.
3. In `Choose How Lists Refresh`, select when push notifications appear.

Option	Description
None	Lists don't refresh and push notifications don't appear.
Refresh List	The entire list refreshes when there are any changes to it. Records are added or removed from the list based on the list's criteria, but new records added to queues only refresh the record owner's list.
Refresh List Rows	Rows in the list refresh when there are any changes to fields selected for push notifications.

4. In `Choose How Detail Pages Refresh`, select when push notifications appear.

Option	Description
Do Not Refresh	Detail pages don't refresh and push notifications don't appear.
Automatically Refresh	The detail page automatically refreshes when a record is changed.
Flag	A message appears on the detail page when a record is changed.

5. Click **Select objects and fields for notifications**, and select **Edit**. The push notification settings you choose here will apply to all of your console apps.
6. Select the objects that will trigger push notifications. For example, if you want any changes to cases or case fields to trigger push notifications, move `Cases` from `Available Items` to `Selected Items`.
7. Under `Fields`, click **Edit** and choose the fields you want to trigger push notifications.
8. Click **OK**, then select **Save**.
9. Grant push notification users at least the "Read" permission on the `Push Topics` standard object. See [User Permissions and Access](#).

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud


Available in: **Performance** and **Developer** Editions with the Sales Cloud


Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To configure push notifications:

- "Customize Application"

 **Important:** When the `Require HttpOnly` attribute is turned on for session security, push notifications don't appear.

 **Note:** These objects and their fields are available for push notifications: accounts, contacts, cases, leads, opportunities, campaigns, tasks, and custom objects.

SEE ALSO:


[Salesforce Console Configurable Features](#)

[Salesforce Console](#)

## Turn on Interaction Logs

To display interaction logs, you must turn them on for page layouts assigned to different user profiles.

1. Edit any page layout and click **Layout Properties**.
2. Check `Interaction Log` and click **OK**.
3. Click **Save**.

 **Note:** If you turn interaction logs on or off, you must close and reopen records to see the changes.

SEE ALSO:

[Set Up Interaction Logs for a Salesforce Console](#)

[Assign Interaction Logs](#)

[Salesforce Console Configurable Features](#)

[Salesforce Console](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To turn on interaction logs:

- "Customize Application"



## Set Up Interaction Logs for a Salesforce Console

An interaction log lets Salesforce console users write notes on records that appear on primary tabs.


For example, when cases appear on primary tabs, an interaction log can appear so that users can take notes on cases. You can create multiple interaction logs and customize them to display specific task fields for different users to update.

1. From Setup, enter *Interaction Log Layouts* in the **Quick Find** box, then select **Interaction Log Layouts**.
2. Click **New**.
3. Name the interaction log.
4. Select task fields to add to the interaction log and click **Add**.
  - \* indicates required fields.
  - You can only add editable task fields to interaction logs.
  - The `Enter your notes here...` field is automatically added to all interaction logs; you can't remove it.
5. If you want this interaction log to be the default for all users, select `Set as default layout`.

You can't delete a default interaction log; you must first mark another interaction log as the default for your organization.

6. Click **Save**.

After you set up or customize interaction logs, you can assign them to different user profiles and turn them on to display.

 **Tip:** You can create custom fields for tasks and add them to interaction logs. For example, you can create a `Caller Disposition` picklist with values of Angry, Neutral, and Satisfied.

### SEE ALSO:

[Turn on Interaction Logs](#)

[Assign Interaction Logs](#)

[Salesforce Console Configurable Features](#)

[Salesforce Console](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS


To set up interaction logs:

- "Customize Application"

## Assign Interaction Logs

After you set up or customize interaction logs, you can assign them to different user profiles.

1. From Setup, enter *Interaction Log Layouts* in the **Quick Find** box, then select **Interaction Log Layouts**.
2. Click **Log Layout Assignment**.
3. Choose an interaction log to assign to each user profile.
4. Click **Save**.

 **Note:** You can't assign interaction logs to portal user profiles because Salesforce console apps aren't available to portal users.

### SEE ALSO:

- [Turn on Interaction Logs](#)
- [Set Up Interaction Logs for a Salesforce Console](#)
- [Salesforce Console Configurable Features](#)
- [Salesforce Console](#)

## Add Live Agent to the Salesforce Console

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

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

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

1. From Setup, enter *Apps* in the **Quick Find** box, then select **Apps**.
2. Click **Edit** next to the name of the Salesforce console app in which you want to set up Live Agent.
3. Select **Include Live Agent in this App**.
4. Choose the records or pages that you want to open as subtabs of chat sessions in the chat workspace.
5. Optionally, if your organization has Knowledge enabled, select **Include Suggested Articles from Knowledge in Live Agent** to display the Knowledge One widget in the chat workspace.

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To assign interaction logs:

- "Customize Application"

### EDITIONS

Available in: Salesforce Classic

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

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

### USER PERMISSIONS

To add Live Agent to the Salesforce console:

- "Customize Application"

## 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:


[Salesforce Console](#)

# Using Macros in Service Console

## Macros Overview

Support agents who use Case Feed now can run macros to automatically complete repetitive tasks—such as selecting an email template, sending an email to a customer, and updating the case status—all in a single click. Macros save time and add consistency to support agents' work.

You can create macros to perform multiple actions on the Case Feed. For example, a macro can enter the subject line of an email and update the case status. A single macro can perform multiple actions on different parts of the Case Feed at the same time.

 **Note:** Macros are only supported on Feed-based layouts for Accounts, Contacts, Leads, and Cases Objects.

### IN THIS SECTION:

[Getting Started with Macros](#)

Before you can create and run macros, set up the Salesforce Console for Service environment.

[Tips for Creating Macros](#)

How you name and design your macro can impact its usefulness to support agents. Keep these tips in mind when creating macros.

[Create Macros](#)

You can create a macro by specifying the instructions for actions that the macro performs. A macro is like a little computer program. You need to tell the macro each step that it performs. This example shows how to create a simple macro.

[Run a Macro in the Salesforce Console for Service](#)

Macros automate a series of repetitive keystrokes that support agents make in the Salesforce Console for Service. You can quickly complete repetitive tasks, such as updating the case status, by running a macro.

[Shortcuts for Macros](#)

You can use the keyboard shortcuts to work even more efficiently with macros.

### EDITIONS

Available in: **Salesforce Classic**

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with a Service Cloud license

## Getting Started with Macros

Before you can create and run macros, set up the Salesforce Console for Service environment.

1. Enable feed tracking for the object.
2. Create a feed-based page layout on a supported object. Macros are supported on the Accounts, Cases, Contacts, and Leads objects.
3. Add the publisher actions that you want to use in macros to the page layout. For example, add the Email Action to the case page layout.
4. If you want to use Quick Actions in macros, create a Quick Action and add it to the page layout.
5. Add the Macros browser as a [console component](#) to the page layout.
6. Make sure that users have the user permissions to [create macros](#) or [run macros](#), as appropriate.

SEE ALSO:

[Tips for Creating Macros](#)

[Create Macros](#)

[Irreversible Macros](#)

## Tips for Creating Macros

How you name and design your macro can impact its usefulness to support agents. Keep these tips in mind when creating macros.

1. The `Macro Name` helps support agents decide which macro to use. The name is used when agents search for macros, so it's useful to use a short name (so that agents can see it in the macros list) that succinctly identifies the macro's purpose.
2. Although `Description` is optional, it is useful for helping support agents to understand what the macro does.
3. The macro instructions are like a little computer program, so you must tell the macro each step, or instruction, to perform. Each instruction is equivalent to a click that the support agent makes when manually performing the task. The first macro instruction selects the object that the macro acts upon, such as the Active Case Tab.

### EDITIONS

Available in: Salesforce Classic


Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with a Service Cloud license

### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with a Service Cloud license

- The second macro instruction specifies the context, or component of the Salesforce Console for Service, in which the macro works. For example, the Email Action context allows the macro to set fields and perform actions within the Email Publisher.

 **Note:** If a Salesforce Console for Service component isn't enabled and configured, then you can't create a macro for it.

- The third macro instruction specifies the action that the macro performs. For example, the macro in the screenshot changes the value for the CC Address field in an email action in the active case tab.
- You can add an additional set of instructions in the same context or in a different context. A simple macro just performs one task. Create more complex macros by adding instructions.

## Create Macros

You can create a macro by specifying the instructions for actions that the macro performs. A macro is like a little computer program. You need to tell the macro each step that it performs. This example shows how to create a simple macro.

### User Permissions Needed

To view macros:	"Read" on Macros
To create and edit macros:	"Create" and "Edit" on Macros
To create and run irreversible macros:	"Manage Macros That Users Can't Undo"

### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with a Service Cloud license

To create this example macro, the Email Publisher must be enabled in your organization.

- Create a macro.
  - In the Salesforce for Service Console, click the **Macros** widget.
  - Click **+ Create Macros**.
  - For **Macro Name**, enter a name that makes it easy to understand what this macro does. For example, *Replace email subject with "Steps for Resetting Your Password"*.
  - For **Description**, explain the purpose for this macro. The optional **Description** field helps support agents understand what this macro does and distinguish it from similar macros.
- Add the instructions for the macro.
  - Select a context for the macro. The context specifies the part of case feed that the macro interacts with. For example, selecting **Select Active Tab** tells the macro that it's performing an action on the active case tab in Case Feed.
  - Click **Done**. After every instruction, click **Done** to move to the next line.
  - Select the object that the macro interacts with. For example, selecting **Select Email Action** tells the macro to interact with the Email Publisher in Case Feed.
  - Select the action that you want the macro to perform. For example, suppose that you want to replace the subject line of an email in the case, so you select **Replace Subject**. This instruction tells the macro to change the subject field in the email. It also displays a text field, where you can specify the subject that you want to replace.
  - In the text field, enter the subject line. This instruction clears the original subject and replaces it with the value you specified in the macro.

For example, you enter *Steps for Resetting Your Password* in the text field. Suppose the customer's original email contained the subject "Password Problems." The agent runs the macro, automatically replacing the original subject with the new subject.

f. Finally, select **Submit Action** to tell the macro to execute these instructions.

### 3. Save the macro.

You've created a macro that replaces the original subject line in an email in Case Feed with a new subject line.

After creating a macro, it's a good idea to run it to make sure that it works the way you want. To test this macro, go to the Salesforce Console for Service and open a case record. Open the Macros widget. Select and run this macro.

## Run a Macro in the Salesforce Console for Service

Macros automate a series of repetitive keystrokes that support agents make in the Salesforce Console for Service. You can quickly complete repetitive tasks, such as updating the case status, by running a macro.


### User Permissions Needed

To view macros:	"Read" on Macros
To create and edit macros:	"Create" and "Edit" on Macros
To create and run irreversible macros:	"Manage Macros That Users Can't Undo"

### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with a Service Cloud license

 **Note:** You need the Manage Macros That Users Can't Undo permission only if you want to run macros that contain a Submit Action instruction. All bulk macros contain a Submit Action instruction. The lightning bolt icon ( ⚡ ) indicates that the macro performs an action—such as sending an email—that cannot be undone.

1. Open the Macros widget.

2. Search for a macro and select it from the macros list.

To search for a macro, enter some letters from its name in the Search Macros box. Salesforce lists macros that contain the search keywords or letters in the results. If the Search Macros box is empty, the list displays your 25 most recently used macros. If you ran a macro or viewed its detail page, then it is considered to be recently used.

3. Optionally, review the macro's description and instructions to make sure that this macro does what you expect.

The instructions show you the steps that the macro performs. Reviewing the instructions is helpful when running a macro for the first time.

4. Click **Run** ( ▶ ) to start the macro.

A message displays indicating whether the macro ran successfully. A green dot appears next to each instruction that ran successfully. A red dot and an error message appear next to each instruction that could not be performed, so you can troubleshoot the issue.

### IN THIS SECTION:

#### [Irreversible Macros](#)

Some macros perform actions that can't be undone, such as sending outbound emails to customers or updating a case status. A macro that contains a Submit Action instruction is irreversible. You must have the Manage Macros Users Can't Undo user permission to create, edit, and run macros that contain instructions for performing irreversible actions.

## Irreversible Macros

Some macros perform actions that can't be undone, such as sending outbound emails to customers or updating a case status. A macro that contains a Submit Action instruction is irreversible. You must have the Manage Macros Users Can't Undo user permission to create, edit, and run macros that contain instructions for performing irreversible actions.

The lightning bolt icon ( ⚡ ) indicates that a macro is irreversible.

If you don't have the Manage Macros Users Can't Undo permission, you can still:

- Create and edit macros that don't contain instructions for performing irreversible actions
- Clone, delete, and share macros that do contain instructions for performing irreversible actions

 **Example:** Macros that perform the following types of actions are considered to be irreversible:

- Send email
- Update a case status

## Shortcuts for Macros

You can use the keyboard shortcuts to work even more efficiently with macros.

**Table 1: Macro Shortcuts**

Press:	To:
<b>M</b>	Open the Macros widget.
<b>S</b>	Put your cursor in the search bar.
<b>E</b>	Edit the selected macro.
<b>V</b>	View the Macro Details page.
<b>Enter</b>	Run the selected macro.
<b>Space bar</b>	Expand or collapse the selected macro's instructions.
<b>Up Arrow</b>	Scroll up the macros list.
<b>Down Arrow</b>	Scroll down the macros list.

## Bulk Macros

A bulk macro is a macro that you can run on multiple records at the same time. Bulk macros let support agents quickly address spikes in customer cases involving the same issue. Macros must meet certain criteria to be run as bulk macros.

Bulk macros are supported for the:

- Email Publisher in Case Feed on the Salesforce Console for Service
- All Quick Actions except for Social Quick Actions

Bulk macros are not supported for:

- Salesforce Knowledge actions

### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with a Service Cloud license

### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with a Service Cloud license

### EDITIONS


Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with a Service Cloud license

- Community actions
- Social post actions
- “Add” and “Insert” instructions (such as the Add to Subject instruction or the Insert into HTML Body instruction for the Email Publisher)

If the bulk macro interacts with the Email Publisher, it can contain only one Email Publisher action.

A bulk macro must contain at least one Submit Action instruction.

 **Example:** For example, suppose that your company has a service outage and lots of customers have contacted customer support. You want support agents to send an email to customers who have opened cases about the outage telling them when the service outage will end. You can create a bulk macro that uses an email template to create and send an email to these customers.

#### IN THIS SECTION:

##### [Create a Bulk Macro](#)

This example shows you how to create a bulk macro that sends an email to the contact person for the selected customer cases.

##### [Tips for Creating Bulk Macros](#)

The key to successfully using bulk macros is to select the right records to run the macro on. Support agents can filter the list views to identify which records to select.

##### [Run a Bulk Macro on Multiple Records](#)

You can run a bulk macro on only one record at a time, or you can run it on multiple records at the same time. Use bulk macros to quickly address similar customer cases or records.

## Create a Bulk Macro

This example shows you how to create a bulk macro that sends an email to the contact person for the selected customer cases.

User Permissions Needed	
To view macros:	“Read” on Macros
To create and edit macros:	“Create” and “Edit” on Macros
To create and run irreversible macros:	“Manage Macros That Users Can’t Undo”
To run bulk macros:	“Run Macros on Multiple Records”

#### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with a Service Cloud license


For example, suppose that your company has a service outage and lots of customers have contacted customer support. You want support agents to send an email to customers who have opened cases about the outage telling them when the service outage will end. You can create a bulk macro that uses an email template to create and send an email to these customers.

These steps show you how to create a bulk macro that sends an email to the contact person on the selected cases. To recreate this example in your organization, enable the Email Publisher.

1. Create a macro.
2. Add the instructions for the macro.
  - a. Select a context for the macro. The context specifies the object that the macro interacts with. For example, selecting **Select Active Tab** tells the macro that it’s performing an action on the active case tab in Case Feed.
  - b. Click **Done**. After every instruction, click **Done** to move to the next line.




- c. Select the publisher that the macro interacts with.  
For example, selecting **Select Email Action** tells the macro to interact with the Email Publisher in Case Feed.
  - d. Select the action that you want the macro to perform.  
You can select **Apply Email Template** and specify which email template to use.
  - e. Finally, select **Submit Action** to tell the macro to perform these instructions.
3. Save the macro.  
You've created a macro that creates and sends an email to the contact person for the selected cases. This macro can be run as a bulk macro because it meets all the criteria for a bulk macro. It interacts with the Email Publisher, it uses a supported instruction, and it includes a Submit Action instruction. You can run this macro as a bulk macro on multiple records at the same time. You also can run it on a single record at a time.

When you look at the macros list, an icon showing a green lightning bolt with two underlines (  ) appears next to bulk macros. Make sure that this icon appears next to your macro.

## Tips for Creating Bulk Macros

The key to successfully using bulk macros is to select the right records to run the macro on. Support agents can filter the list views to identify which records to select.

When you create a bulk macro, it's a good practice to add an instruction that changes a field value on the record. Agents can filter records in the list view based on the field value. Updating a field value lets agents distinguish the records on which the macro has been run from the cases on which the macro hasn't been run.

 **Example:** For example, suppose many customers open cases about the same issue in a short time. The support agent can run a bulk macro that emails these customers to tell them that the company knows of the issue and is fixing it. But what happens two days later, when the agent wants to run the bulk macro a second time on new cases about the same issue?

Because agents use filtering to determine which cases to apply the macro to, it's helpful to add instructions to the bulk macro that change a field value. This way, when the macro runs, it automatically updates the field value. Later on, when the agent has new cases to respond to, the agent can filter cases based on this field.

## Run a Bulk Macro on Multiple Records

You can run a bulk macro on only one record at a time, or you can run it on multiple records at the same time. Use bulk macros to quickly address similar customer cases or records.

### User Permissions Needed

To view macros:	"Read" on Macros
To create and edit macros:	"Create" and "Edit" on Macros
To create and run irreversible macros:	"Manage Macros That Users Can't Undo"
To run bulk macros:	"Run Macros on Multiple Records"

### EDITIONS


Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with a Service Cloud license

### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with a Service Cloud license

 **Note:** You need the Manage Macros That Users Can't Undo permission only if you want to run macros that contain a Submit Action instruction. All bulk macros contain a Submit Action instruction. The lightning bolt icon ( ⚡ ) indicates that the macro performs an action—such as sending an email—that cannot be undone.

You can run bulk macros on records from the Accounts, Cases, Contacts, and Leads objects. However, you can run a bulk macro only on records in one object list view at a time. For example, you can run a bulk macro on multiple cases in the Cases list view, but not on cases and accounts at the same time.

An icon showing a green lightning bolt with two underlines ( ⚡ ) indicates whether a macro is a bulk macro.

Bulk macros are processed in increments of 10 macros at a time. You can run a bulk macro on more than 10 cases, but the system processes the macro in groups of 10 at a time.

1. In the Case list view, select the cases that you want to run the macro on.  
You can filter the cases to identify which cases you want to run the macro on.
2. Open the Macros widget.
3. In the Macro widget, select a macro with the green lightning bolt icon ( ⚡ ) and click **Run**.
4. In the confirmation window, click **OK** to continue.  
The macro runs on the selected cases. In the list view, the cases on which the macro ran successfully are highlighted in green and denoted by a green check mark icon. Cases that the macro didn't run successfully on are highlighted in red and denoted by a red X icon. To see an explanation about why the macro didn't work on a case, hover over the red X icon.

## Examples of Macros

These examples show how you can create different types of macros based on your business needs.

### IN THIS SECTION:

#### [Add and Replace Field Values in a Case Using Macros](#)

Suppose that your support agents often add the same field values to a record, or that they often replace a field value. You can create a macro that automatically adds content to a field or that replaces the values in a field. Using a macro saves agents time because it automates repetitive and routine actions, freeing them to focus on helping customers.

#### [Insert Quick Text in a Social Post](#)

Suppose that support agents often respond to customer questions on social networks, such as Twitter or Facebook. You can use a macro to automatically insert a reply into the post using Quick Text or text. This type of macro enables agents to quickly respond to customers without interrupting their workflow.

#### [Automatically Attach a Salesforce Knowledge Article to an Email in Case Feed Using Macros](#)

Perhaps your support agents often send customers the same article in Salesforce Knowledge. This example explains how to create a macro that automatically selects a specific article and inserts it into an email in Case Feed. This macro lets agents answer a common customer question by clicking one button, instead of spending time searching for the article and copying it into the email.

### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with a Service Cloud license

## Add and Replace Field Values in a Case Using Macros

Suppose that your support agents often add the same field values to a record, or that they often replace a field value. You can create a macro that automatically adds content to a field or that replaces the values in a field. Using a macro saves agents time because it automates repetitive and routine actions, freeing them to focus on helping customers.

The Email Publisher must be enabled in your organization.

These steps illustrate some ways that you can use Add, Replace, and Insert instructions in a macro.

1. Create a macro.
2. Add the instructions to tell the macro what email field value to replace. This example shows how to replace the Subject field in an email.
  - a. In the Macro Instructions section, click **+Add Instruction**.
  - b. The first instruction tells the macros which object to act upon. Here, select **Select Active Case Tab**.
  - c. The next instruction tells the macro which action in the Case Feed Publisher to interact with. Here, select **Select Email Action**.
  - d. Now, tell the macro what to do in the Email Action. Select **Replace Subject**. In the text field, specify the subject line.
 

Selecting a Replace instruction clears the existing value in the field, and replaces it with the value specified in the macro.

For example, enter *Update on Your Order*. Suppose that the subject line was *Haven't Received My Order*. The macro clears the old subject line and replaces it with *Update on Your Order*.
3. Add the instructions to tell the macro to replace an email field with a blank value. In this example, we clear the BCC field.
  - a. Select **Replace BCC Addresses**. Leave the text field empty.
 

Selecting a Replace instruction and leaving the text field empty clears the values in the field, so you end up with a blank field.
4. Add the instructions to tell the macro to insert values into a field. In this example, we add two email addresses to the CC field.
  - a. Select **Add CC Addresses**. In the text field, specify the email addresses. You can specify multiple email addresses by separating them with a comma.
 

Selecting an Add or Insert instruction adds the value specified in the macro to the field, but doesn't delete values that are already there.

For example, enter *shipping@example.com, invoices@example.com*. Suppose that the CC field already contains *support@example.com*. This macro appends the *shipping@example.com* and *invoices@example.com* after *support@example.com*.
5. Select **Submit Action**. This instruction tells the macro to execute the email action.
6. Save the macro.

### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with a Service Cloud license

### USER PERMISSIONS

To view macros:

- "Read" on Macros

To create and edit macros:

- "Create" and "Edit" on Macros

To create an irreversible macro:

- "Manage Macros Users Can't Undo"

## Insert Quick Text in a Social Post

Suppose that support agents often respond to customer questions on social networks, such as Twitter or Facebook. You can use a macro to automatically insert a reply into the post using Quick Text or text. This type of macro enables agents to quickly respond to customers without interrupting their workflow.

The Email Publisher, Quick Text, and Social Customer Service must be enabled in your organization.

These steps illustrate one way that you can use Insert instructions in a macro.

1. Create a macro.
2. Add the instructions to tell the macro what to do. This example shows how to insert Quick Text into a social post.
  - a. In the Macro Instructions section, click **+Add Instruction**.
  - b. The first instruction tells the macros which object to act upon. Here, select **Select Active Case Tab**.
  - c. The next instruction tells the macro which action in the Case Feed publisher to interact with. Here, select **Select Social Action**.
  - d. Now, tell the macro what to do in the social action. Select **Insert into Body**. You can insert either **Quick Text** or **Text**.
 

Selecting an Insert instruction appends the Quick Text or Text specified in the macro to the end of the text already in the field. In social publisher actions, the Insert instruction is useful because you can retain the @mention and add text after it.
  - e. Specify which Quick Text you want to macro to use, or enter the text that you want it to use.
3. Select **Submit Action**. This instruction tells the macro to execute the social action.
4. Save the macro.

### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with a Service Cloud license

### USER PERMISSIONS

To view macros:

- "Read" on Macros

To create and edit macros:

- "Create" and "Edit" on Macros

To create an irreversible macro:


- "Manage Macros Users Can't Undo"

## Automatically Attach a Salesforce Knowledge Article to an Email in Case Feed Using Macros

Perhaps your support agents often send customers the same article in Salesforce Knowledge. This example explains how to create a macro that automatically selects a specific article and inserts it into an email in Case Feed. This macro lets agents answer a common customer question by clicking one button, instead of spending time searching for the article and copying it into the email.

You must have Salesforce Knowledge One enabled for your organization. The Salesforce Knowledge One component must be enabled and added as a component to the Salesforce Console for Service page.

1. Create a macro.
2. Add the instructions to tell the macro to search for a specific article.
  - a. In the Macro Instructions section, click **+Add Instruction**.
  - b. The first instruction tells the macros which case to act upon. Here, select **Select Active Case Tab**.
  - c. The next instruction tells the macro which part of the console to act upon. Here, select **Select Knowledge Sidebar Component**.
  - d. Now, let's tell the macro what do in the Knowledge Sidebar. Select **Select Articles Search**.
  - e. This step defines the keyword that the Knowledge search uses to find the right article. Select **Set Keywords**. In the text field, you can specify either the article number or a keyword.
    - Article number: The article number retrieves an article by its number, which is useful when you want to select a specific article. The syntax is `articlenumber:123456789`.
 

 **Note:** The syntax is case-sensitive and must be written in lower case.
    - Keywords: You also can search by keywords. Salesforce looks for these keywords in the title and body of the articles in the knowledge base. For example, enter "Reset Your Password."
  - f. Select **Run Search**. This instruction tells the macro to perform the search when someone runs this macro.
3. Add the instructions to tell the macro to insert the article into the email that is being edited in Case Feed.
  - a. Click **Select Most Relevant Article**. This instruction tells the macro to use the article that came up first in the search results.
  - b. Select **Insert into Email as HTML**. This instruction inserts the entire article, including text and images, into the email at the cursor position.
4. Save the macro.

## Manage Macros

It's simple to clone, share, and delete macros.

### IN THIS SECTION:

#### [Clone Macros](#)

You can quickly copy macros by cloning them. Cloning macros is useful for creating macros that are variants of the source macro.

### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with a Service Cloud license and a Salesforce Knowledge license

### USER PERMISSIONS

To view macros:

- "Read" on Macros

To create and edit macros:

- "Create" and "Edit" on Macros

### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with a Service Cloud license

[Share Macros](#)

Macros use the same sharing model as other objects in Salesforce. You can share macros with public groups and other users, allowing other support agents to increase their efficiency with macros.

[Delete Macros](#)

You can delete macros that you don't need anymore.


## Clone Macros

You can quickly copy macros by cloning them. Cloning macros is useful for creating macros that are variants of the source macro.

### User Permissions Needed

To view macros:	"Read" on Macros
To clone macros:	"Create" and "Edit" on Macros

Both administrators and support agents can clone macros if they have the appropriate user permissions.


1. Open the Macros widget.
2. Click the macro that you want to clone.
3. If you are using the Macros widget, click the **View Detail** icon (  ).
4. Click **Clone**.
5. In the `Macro Name` field, enter a unique name for the macro.
6. Optionally, modify the instructions for the macro. You can also modify the instructions at another time.
7. Click **Save**.

## Share Macros

Macros use the same sharing model as other objects in Salesforce. You can share macros with public groups and other users, allowing other support agents to increase their efficiency with macros.

### User Permissions Needed

To view macros:	"Read" on Macros
To share macros:	"Create" and "Edit" on Macros

1. Open the Macros widget.
2. Select the macro that you want to share.
3. Click the **View Detail** icon (  ).
4. Click **Sharing**.
5. In the New Sharing page, search for a public group or for a user by name.

### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with a Service Cloud license

### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with a Service Cloud license


6. Share the macro by selecting a group or user from the **Available** list and clicking **Add**. To stop sharing a macro, select a group or user from the **Share With** list and click **Remove**.
7. If you're sharing the macro, set the `Access Level` to either *Read Only* or *Read/Write*.
  - *Read Only* allows support agents to view and run the macro.
  - *Read/Write* allows support agents to edit, view, and run the macro.
8. Click **Save**.

## Delete Macros

You can delete macros that you don't need anymore.

User Permissions Needed	
To view macros:	"Read" on Macros
To delete macros:	"Delete" on Macros

Both administrators and support agents can delete macros, provided that they have the appropriate user permissions.

1. In the Salesforce Console Home Page, click **Macros** or **M** to open the Macros widget. You also can access macros from the Macros tab.
2. Click the macro that you want to delete.
3. If you are using the Macros widget, click the **View Detail** icon (  ). (This step is not necessary if you are using the Macros tab.)
4. Click **Delete**.
5. Click **OK** on the confirmation window.

## Publishers and Actions Supported in Macros

The following publishers and actions are supported on macros in the Salesforce Console for Service.

### IN THIS SECTION:

#### [Email Publisher Actions Supported in Macros](#)

These actions are available when you click **Select Email Action** in the macro instructions. Email actions let you modify text in emails in Case Feed. You can create and run macros to perform these actions on the Email Publisher in the Salesforce Console for Service.

#### [Salesforce Knowledge Actions Supported in Macros](#)

These actions are available when you click **Select Knowledge Sidebar Component** in the macro instructions. Knowledge actions let you search for knowledge articles and add articles to cases. You can create and run macros to perform these actions on the Salesforce Knowledge Publisher in the Salesforce Console for Service.

#### [Custom Quick Actions Supported in Macros](#)

These actions are available when you click **Select Name of Quick Action** in the macro instructions. You can create and run macros to perform custom quick actions in the Salesforce Console for Service.

### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with a Service Cloud license

### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with a Service Cloud license

[Community Publisher Actions Supported in Macros](#)

These actions are available when you click **Select Community Action** in the macro instructions. Community actions let you update and post to Salesforce Communities. You can create and run macros to perform these actions on the Community Publisher in the Salesforce Console for Service.

[Social Actions Supported in Macros](#)

These actions are available when you click **Select Social Action** in the macro instructions. You can create and run macros to perform these actions on the Social Publisher in the Salesforce Console for Service.

## Email Publisher Actions Supported in Macros

These actions are available when you click **Select Email Action** in the macro instructions. Email actions let you modify text in emails in Case Feed. You can create and run macros to perform these actions on the Email Publisher in the Salesforce Console for Service.

To use these actions, you must have the Email Publisher enabled in your organization and added as a console component to the case page layout.

Bulk macros are supported for Email Publisher actions.

**Table 2: Email Publisher Actions Supported in Macros**

Action	Description	Supported in Bulk Macros?
Replace To Addresses	Clears the email addresses in the To Address field and replaces them with the specified email addresses. To use multiple email addresses, separate them with a comma.	Yes
Add to To Addresses	Adds these email addresses to the To field, but does not delete any addresses already in the To field. To use multiple email addresses, separate them with a comma.	No
Replace CC Addresses	Clears the email addresses in the CC Address field and replaces them with the specified email addresses. To use multiple email addresses, separate them with a comma.	Yes
Add to CC Addresses	Adds these email addresses to the CC field, but does not delete any addresses already in the CC field. To use multiple email addresses, separate them with a comma.	No
Replace BCC Addresses	Clears the email addresses in the BCC Address field and replaces them with the specified email addresses. To use multiple email addresses, separate them with a comma.	Yes
Add to BCC Addresses	Adds these email addresses to the BCC field, but does not delete any addresses already in the BCC field. To use multiple email addresses, separate them with a comma.	No
Set From Address	Clears the email address in the From Address field and replaces it with the specified email address.	Yes
Replace Subject	Clears the Subject field and replaces it with the specified text.	Yes

### EDITIONS

Available in: **Salesforce Classic**

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with a Service Cloud license




Action	Description	Supported in Bulk Macros?
Add to Subject	Appends this text to the end of the Subject field, but does not delete any existing text already in the Subject field.	No
Replace HTML Body	Clears the contents of the email body and replaces it with the specified HTML content.	Yes
Insert into HTML Body	Adds a QuickText or Text into the HTML body text, but does not delete any existing text already there. The QuickText or Text is inserted at the cursor position.	No
Apply Email Template	Inserts the specified email template into an email in the active case tab.	Yes
Submit Action	<p>Tells the macro to perform these instructions when someone runs this macro.</p> <p>A macro that contains a Submit Action instruction is irreversible. You must have the Manage Macros Users Can't Undo user permission to create, edit, and run macros that contain instructions for performing irreversible actions.</p> <p>A macro that contains a Submit Action instruction can be run as a bulk macro. You must have the Run Macros on Multiple Records user permission to run bulk macros.</p>	Yes

## Salesforce Knowledge Actions Supported in Macros

These actions are available when you click **Select Knowledge Sidebar Component** in the macro instructions. Knowledge actions let you search for knowledge articles and add articles to cases. You can create and run macros to perform these actions on the Salesforce Knowledge Publisher in the Salesforce Console for Service.

To use these actions, you must have Salesforce Knowledge enabled in your organization and added as a console component. Salesforce Knowledge actions, such as attaching an article to a case, must be enabled in the console.

 **Note:** The Knowledge Sidebar must be expanded when you run a Knowledge macro. If the sidebar is collapsed, the macro doesn't work.

Internet Explorer 7 and Bulk macros are not supported for Salesforce Knowledge actions.

### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with a Service Cloud license

**Table 3: Salesforce Knowledge Actions Supported in Macros**

Action	Description	Supported in Bulk Macros?
Select Knowledge Sidebar Component	Tells the macro that these instructions affect the Knowledge Sidebar in the console.	No
Select Article Search	Tells the macro that the instructions affect Knowledge search.	No
Set Keywords	<p>Specifies the keywords to use when searching the knowledge base. You can search by:</p> <ul style="list-style-type: none"> <li>Article number: The article number retrieves an article by its number, which is useful when you want to select a specific article. The syntax is <code>articlenumber:123456789</code>.</li> </ul>	No

Action	Description	Supported in Bulk Macros?
	<ul style="list-style-type: none"> <li>Keywords: You can search by keywords. The Salesforce Knowledge search looks for these keywords in the title and body of the articles in the knowledge base. For example, the phrase <i>Reset Your Password</i> returns articles that contain that phrase.</li> </ul>	
Run Search	Tells the macro to search the knowledge base using the criteria specified in the Set Keywords instruction.	No
Select Most Relevant Article	Selects the first article listed in the search results.	No
Attach to Case	Attaches the article to the case.	No
Attach to Email as PDF	Adds the article as a PDF attachment to the email in the case.	No
Insert into Email as HTML	Inserts the article text and links into the email in the case.	No

## Custom Quick Actions Supported in Macros

These actions are available when you click **Select** *Name of Quick Action* in the macro instructions. You can create and run macros to perform custom quick actions in the Salesforce Console for Service.

To use these actions, you must have Quick Actions defined in your organization and added to the case feed page layout.

Bulk macros are not supported on Quick Actions for social actions.

**Table 4: Custom Quick Actions Supported in Macros**

Action	Description	Supported in Bulk Macros
Replace <text field>	Clears the contents of the text field and replaces it with the specified text.	Yes
Add to <text field>	Adds the specified text to the end of the text field, but does not delete any existing text already there. The Text is inserted at the cursor position.	No
Submit Action	<p>Tells the macro to perform these instructions when someone runs this macro.</p> <p>A macro that contains a Submit Action instruction is irreversible. You must have the Manage Macros Users Can't Undo user permission to create, edit, and run macros that contain instructions for performing irreversible actions.</p>	Yes

### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with a Service Cloud license

Action	Description	Supported in Bulk Macros
	A macro that contains a Submit Action instruction can be run as a bulk macro. You must have the Run Macros on Multiple Records user permission to run bulk macros.	

## Community Publisher Actions Supported in Macros

These actions are available when you click **Select Community Action** in the macro instructions. Community actions let you update and post to Salesforce Communities. You can create and run macros to perform these actions on the Community Publisher in the Salesforce Console for Service.

To use these actions, you must have the Community Publisher enabled in your organization and added as a console component to the case page layout.

Bulk macros are not supported on Community Publisher actions.

**Table 5: Community Publisher Actions Supported in Macros**

Action	Description	Supported in Bulk Macros?
Replace Body	Clears the contents of the post and replaces it with the specified text.	No
Insert into Body	Adds a QuickText or Text into the Community post, but does not delete any existing text already there. The QuickText or Text is inserted at the cursor position.	No
Submit Action	Tells the macro to perform these instructions when someone runs this macro.  A macro that contains a Submit Action instruction is irreversible. You must have the Manage Macros Users Can't Undo user permission to create, edit, and run macros that contain instructions for performing irreversible actions.	No

## Social Actions Supported in Macros

These actions are available when you click **Select Social Action** in the macro instructions. You can create and run macros to perform these actions on the Social Publisher in the Salesforce Console for Service.

To use these actions, you must have Social Actions enabled in your organization and added as a console component to the case feed page layout.

Bulk macros are not supported on Social Actions.

### EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with a Service Cloud license

### EDITIONS

Available in: Salesforce Classic


Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with a Service Cloud license

**Table 6: Social Actions Supported in Macros**

Action	Description	Supported in Bulk Macros?
Replace Content	Clears the contents of the text field and replaces it with the specified text.	No
Insert into Content	Adds the specified text to the text field, but does not delete any existing text already there. The QuickText or Text is inserted at the cursor position.	No
Set Message Type	<p>Tells the macro to use the selected message type.</p> <p>Facebook message types:</p> <ul style="list-style-type: none"> <li>• Post</li> <li>• Comment</li> <li>• Private</li> </ul> <p>Twitter message types:</p> <ul style="list-style-type: none"> <li>• Tweet</li> <li>• Retweet</li> <li>• Reply</li> <li>• Direct</li> </ul>	No
Submit Action	<p>Tells the macro to perform these instructions when someone runs this macro.</p> <p>A macro that contains a Submit Action instruction is irreversible. You must have the Manage Macros Users Can't Undo user permission to create, edit, and run macros that contain instructions for performing irreversible actions.</p>	No

## Turn on Knowledge for a Salesforce Console

If Salesforce Knowledge is set up, you can turn on the Knowledge sidebar so that users working on cases can automatically see relevant knowledge articles that can help them close cases faster.

 **Important:** You must have Salesforce Knowledge set up in your organization before you can add it to a console. Knowledge articles appear based on matching words typed into a case's `Subject`.

1. From the object management settings for cases, go to Page Layouts.
2. Click **Edit** next to a page layout.
3. Click **Layout Properties**.
4. Check `Knowledge Sidebar`, and click **OK**.
5. Click **Save**.

Repeat these steps for each case page layout assigned to console users.

### SEE ALSO:

[Salesforce Console Configurable Features](#)

[Salesforce Console](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To turn on the Knowledge sidebar:

- "Customize Application"

# Customize a Salesforce Console

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## Console Components

Create components to customize, extend, or integrate the Salesforce console with other systems.

Components let you display many types of data in the footer, sidebars, highlights panels, and interaction logs of a console. You can create components to solve a variety of business problems and to display items, such as:

- Third-party apps
- Chat or Softphone widgets
- Content when users view specific pages
- Contextual information alongside records
- Custom highlights panels or interaction logs
- Content when users click a customizable button in the footer

Components let you get creative with a console and build what your users need to do their jobs. To create components, you can use Visualforce, canvas apps, lookup fields, related lists, or report charts. You can also use Force.com Canvas or the Salesforce Console Integration Toolkit to build components. Both technologies are JavaScript APIs that let developers extend or integrate a console. The toolkit provides you with programmatic access to a console to do things like open and close tabs to streamline business processes, whereas Canvas helps you integrate a console with external applications that require authentication methods. For more information (English only) about canvas apps or the toolkit, see [Force.com Canvas Developer's Guide](#) and the [Salesforce Console Integration Toolkit Developer's Guide](#).

### SEE ALSO:

- [Process for Creating Console Components](#)
- [Console Component Implementation Tips](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud


Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

## Process for Creating Console Components

Developers and administrators typically follow these steps when creating components for a Salesforce console.

Even though you can create a variety of console components to solve many types of business problems, the process for creating components generally follows these steps.

1. Developers create a Visualforce page or a canvas app.
  2. Administrators add the Visualforce page or canvas app to either:
    - Page layouts to display content on specific pages or
    - Console apps to display content across all pages and tabs
  3. Administrators who add a component to page layouts:
    - Choose the sidebar in which the console displays, such as right, left, top, or bottom
    - Select whether to add multiple components to a sidebar and arrange them as either a stack, tabs, or accordion
  4. Administrators who add a component to apps:
    - Specify the look and feel of the button used to access the component from the console's footer
    - Assign the component to each console where they want users to access it
  5. Users view the component when they access page layouts or click a button in the footer of a console.
-  **Tip:** To add a lookup field or related list as a component, you can do so without creating a Visualforce page or canvas app. Just follow the steps in “Add Console Components to Page Layouts,” and in the `Type` field, select Lookup or Related List to choose a specific field or list.

### SEE ALSO:

[Console Components](#)

[Console Component Implementation Tips](#)

[Add Console Components to Page Layouts](#)

[Add Console Components to Apps](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

## Console Component Implementation Tips

Before you create a component for a Salesforce console, review these tips.

### Behavior and Access Tips

You can't add canvas app components to AppExchange packages.

When you update records on primary tabs or subtabs, components don't refresh automatically.

If you change the `Height` or `Width` of a console component, refresh your browser to see your updates.

Report chart components aren't available to developers using the Salesforce Metadata API or for migration between sandbox and production instances.

### Page Layout Tips

You can add components to page layouts if you're assigned to a Sales Cloud User Permission or Service Cloud User feature license.

After you turn off the highlights panel or interaction log on a page layout, you can add a component to the Top Sidebar or Bottom Sidebar of primary tabs.


If you want a component to display across all of the subtabs on a primary tab, add the component to the Primary Tab Components section on page layouts. If you add a component to the Subtab Components section on page layouts, the component displays on individual subtabs.

If Salesforce Knowledge is enabled and the [Knowledge sidebar is turned on](#), don't add a component to the Right Sidebar of case page layouts, otherwise the Knowledge sidebar displays over components.

### Visualforce Tips

For each page layout, you can use a Visualforce page as a component once.

If Visualforce pages are assigned to page layouts as components, you can't delete them.

Visualforce pages don't refresh when you click  and select **Refresh all primary tabs** or **Refresh all subtabs**.

If you enable clickjack protection for Visualforce pages in your organization's security settings, Visualforce pages won't display correctly.

Unlike other Visualforce pages, you don't have to set the standard controller on components to the object whose page layout you're customizing.

If you add `showHeader=true` to a Visualforce page, you can add a 15-pixel gap to the right and left sides of a component to visually indicate its location in a sidebar. For example, `<apex:page standardController="Contact" showHeader="false" title="List of Cases">`.

When Visualforce pages are used as components, two URL parameter values are passed automatically:

Parameter Name	Parameter Value	Description
<code>id</code>	A case-sensitive 15-character alphanumeric string that uniquely identifies a record.	The ID of the detail page in which the component displays.  This parameter is only passed if the ID is available.

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost



Parameter Name	Parameter Value	Description
<code>inContextPane</code>	<code>true</code>	Indicates the Visualforce page displays as a component in a Salesforce console.


SEE ALSO:

[Console Components](#)

## Add Console Components to Page Layouts

After you create a console component, you can add it to page layouts so that users can access it from a sidebar in a Salesforce console.

- From the object management settings for the object whose page layout you want to edit, go to Page Layouts.
- Click **Edit** next to a page layout.
- Click **Custom Console Components**.
- Next to the sidebar in which you want to add your component, choose how to display and organize your components by `style`. See [Sidebar Styles for Console Components](#).
- Specify the size of the sidebar in the console by selecting height or width, and typing its percentage or number of pixels. When the height or width of the sidebar is below the following number of pixels, these components types automatically hide because they become too difficult to read:
  - Knowledge One - 250
  - Lookups - 150
  - Related lists - 200
  - Report charts - 150
- Under **Type**, choose whether your component is a Visualforce Page, Canvas App, Lookup, Related List, or Report Chart. Before you can choose a Report Chart, you must add it to the page layout and make sure it's in a folder that's shared with users who need access.
  - If the Knowledge tab is set up in your organization, add the Knowledge One component to case pages so agents can easily find and work with articles.
  - If your organization uses entitlement management, add the Milestone Tracker to case pages so agents can see the latest information on milestones related to cases they're working with.
  - If you have topics enabled for an object, add the Topics component so users can view, add, and delete topics on the records they're working with.
  - Add the Files component to case pages so support agents can use drag-and-drop to quickly attach files to cases, see files that are already attached, and include attached files to case emails.
  - If your organization uses Knowledgeable People and topics on objects, add the Case Experts component to case page layouts so agents can easily collaborate with colleagues who have expertise in specific areas.

 **Note:** Case Experts is currently available through a pilot program. For information on enabling Case Experts for your organization, contact Salesforce.

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To add custom console components:

- “Customize Application”


To create Visualforce pages:

- “Customize Application”

To manage canvas apps:

- “Customize Application”

Since page layouts are limited to two report charts, you can add up to two report charts to a sidebar. You can add up to five components to a sidebar and a maximum of eight components to a page layout. Any canvas app components you add can't be added to AppExchange packages.

7. For Visualforce pages or canvas apps, click  under **Component** to find and select your component. If your component is a lookup field, related list, or report chart, choose the field, list, or chart's name. Optionally, you can add more fields to lookup components by defining objects' mini page layouts. You can also hide report charts and related lists from pages where they appear as components to prevent duplicate information from showing. If you want to reorder related lists, you must do so from page layouts. Note that related list components don't display custom buttons.
8. Under **Label**, type the name for your component as it should display to console users from the sidebar. If you don't type a label for a report chart, the report chart's name is used.
9. Specify the size of the component in the sidebar by selecting height or width, and typing its percentage or number of pixels. If you don't specify a height or width, the component is automatically sized to appear correctly in a console.

**Autosize Components** is available for components with the Stack style. It's selected by default so that when users resize browsers, Stack components fit nicely in sidebars. Salesforce chooses a minimum height and width for Stack components, and you can't change those values. The fit-automatically option is unavailable for Visualforce pages, canvas apps, the Knowledge One component, and Internet Explorer® 7.

10. Click **Save**.

SEE ALSO:

[Sidebar Styles for Console Components](#)

## Add Quick Actions to the Console Sidebar

Add custom quick actions to the console sidebar to let support agents easily create, update, and search for records associated with cases. Quick actions are added as console components.

Create the quick actions before adding them to the Case page layouts in the console.

1. From Setup, enter *Page Layouts* in the **Quick Find** box, then select **Page Layouts** under Cases.
2. Select a page layout to work with.
3. Click **Custom Console Components**.
4. Scroll to the sidebar section where you want to add the quick action component. For example, to add it to the left sidebar, go to the **Left Sidebar** section.
5. Configure the quick action component:
  - **Field**: Select the record field that the quick action affects. For example, if the quick action creates a contact record, select the Contact field.
  - **Enable Linking**: If selected, support agents can associate this record with a case. For example, a support agent can create a contact and link it to a case.
  - **Create Action**: Select the "Create" quick action. This quick action lets support agents create a record.
  - **Update Action**: Select the "Update" quick action. This quick action lets support agents update a record.
6. Add more quick action components as needed.

### EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To create, edit, and delete actions and page layouts, and to add custom console components:

- "Customize Application"

7. Click **Save**.

SEE ALSO:


[Console Components](#)

[Add Console Components to Page Layouts](#)

## Sidebar Styles for Console Components

When administrators add components to page layouts, they choose the sidebar style in which to display the components in a Salesforce console.

The following sidebar styles are available for console components on page layouts.

Multi-Component Type	Description
Stack	A content area with multiple frames. 
Tabs	A single content area with a list of multiple panels. 
Accordion	A collapsible content area.  This style is only available for vertical sidebars.

SEE ALSO:

[Add Console Components to Page Layouts](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.


Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

## Add Console Components to Apps

After you create a console component, you can add it as a button in the footer of Salesforce console so users can access it.

1. From Setup, enter *Custom Console Components* in the **Quick Find** box, then select **Custom Console Components**.
2. Click **New**.
3. Type a name for your component.
4. In **Button Name**, type the label that will display on the button users click to launch your component. For example, *Live Chat*.
5. In **Button CSS**, enter the in-line style used to define how the button looks to users who click it to launch your component. The styles supported include font, font color, and background color. Font and font color isn't available for Internet Explorer® 7.
6. Type the width of the button as it should display in the console.
7. In **Component**, select **Visualforce Page** or **Canvas App**, and either type the name of your component, or click  to find and select it.
8. Type the height and width of the window used to display your component in the console.
9. Click **Fixed Width** or **Fixed Height** to prevent users from changing the dimensions of the window used to display your component.
10. Click **Save**.

Before users can access your component, you must assign it to a console. See [Assigning a Custom Console Component to an App](#).

### SEE ALSO:

[Assign a Console Component to an App](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To add custom console components:

- "Customize Application"

To create Visualforce pages:

- "Customize Application"

To manage canvas apps:

- "Customize Application"

## Assign a Console Component to an App

After you add a console component to Salesforce console apps, you must assign it to each console for user access.

1. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
2. Select a console app.
3. Click **Edit**.
4. In *Choose Custom Console Components*, add any available components to your app.
1. In *Align Console Components*, choose whether to align components to the left or right of the console's footer.
5. Click **Save**.

### SEE ALSO:

[Add Console Components to Apps](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To assign custom console components to an app:

- "Customize Application"

## Brand a Salesforce Console

You can brand a console by adding a custom logo to its header and specifying colors for its header, footer, and primary tabs.

1. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
2. Click **Edit** next to a console.
3. To add a custom logo, click **Insert an image**, and choose an image from the document library.

Consider these requirements when choosing a custom app logo from the document library:

- The image must be in GIF or JPEG format and less than 20 KB.
  - If the image is larger than 300 pixels wide by 55 pixels high, then it is scaled to fit.
  - For the best on-screen display, we recommend that you use an image with a transparent background.
  - The *Externally Available* checkbox must be selected on the document's properties so that users can view the image.
4. To specify a color, type a hex code in *Header Color*, *Footer Color*, or *Primary Tab Color*. For example, type #0000FF to define the header as blue.
  5. Click **Save**.

To verify that the correct colors display, view your console.



**Note:** Defining header or footer colors is not yet available for the Metadata API.

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To define colors in the Salesforce console:

- "Customize Application"

# Use a Salesforce Console

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## Use a Salesforce Console

Get more done faster using a console's enhanced interface to work with records.

Unlike standard Salesforce pages, all items you click in a console display as tabs. Along with the efficiency of tab-based navigation, a console helps you:

- [Work with many records simultaneously](#)
- [View most recently used tabs and bookmarks](#)
- [Resize pinned lists to see more information](#)
- [Navigate more quickly using keyboard shortcuts](#)
- [Work across multiple monitors](#)

A console's dashboard-like interface organizes related data all on one screen so that you can:

- [Search for records](#)
- [Jot notes on records using the interaction log](#)
- [See when records you're viewing have been edited by others](#)
- [Use a SoftPhone to make and receive calls](#)

Additionally, with a Salesforce console for service, you can:

- [Find Salesforce Knowledge articles to solve cases](#)
- [Chat with customers using Live Agent](#)

 **Note:** If your administrator adds [custom console components](#), additional functionality might be available for you in the sidebars and footers of a console.

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

## Salesforce Console Tabs

Any items you click on in a console display as tabs. Tabs let you see all the information you need on one screen without losing context.

### EDITIONS

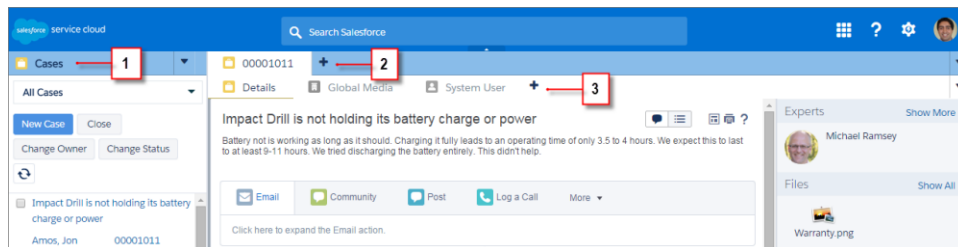
Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### Console Tabs



(1) The navigation tab lets you select objects and records to work with. (2) Primary tabs display the main work items in a console, such as an account. (3) Subtabs display related items on a primary tab, such as an account's contact. Use tabs to navigate within the console as you do your work.



**Warning:** Browsers' back buttons aren't supported for a console and might not work as expected. Console tabs are saved in browser tabs until you close them.

When you close browser tabs, you lose any open console tabs. If your administrator sets up saved user sessions for a console, when you log back into Salesforce, any of your previously open console tabs and console components automatically appear again. Also, if you resize any sidebar components, interaction logs, or close the global search header, those customizations appear again too.

If you log out of Salesforce and log in again using the same window, your previously open tabs reopen in the new session, even when `Save User Sessions` is disabled.

#### SEE ALSO:

[Use a Salesforce Console](#)

[View Bookmarks or Recently Used Tabs in a Salesforce Console](#)



## Salesforce Console Navigation Tab

Use the navigation tab to select an object and view its home page.

### EDITIONS

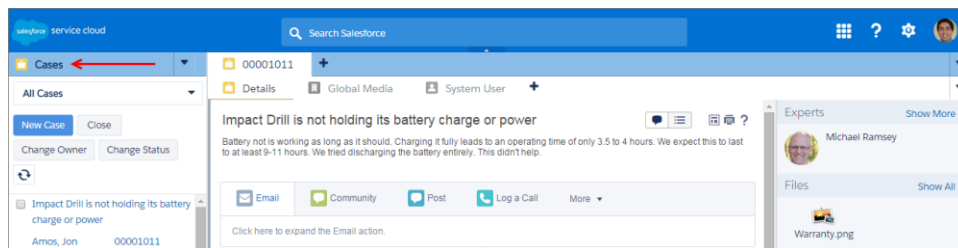
Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### A Console's Navigation Tab



Each console displays one navigation tab. Your administrator determines the list of objects you can choose from a navigation tab, but if it's turned on for you, you can click **Customize My Tabs** to hide, display, and organize the objects.

Most object home pages selected from a navigation tab display list views, which automatically appear as enhanced lists. A navigation tab doesn't display forecasts, ideas, answers, connections, portals, console, or buttons for customizing your organization.

#### SEE ALSO:

[Salesforce Console Tabs](#)

[Use a Salesforce Console](#)

## Guidelines for Working with Salesforce Console Tabs

Learn how you can get the most out of working with a console's primary tabs and subtabs.

### EDITIONS

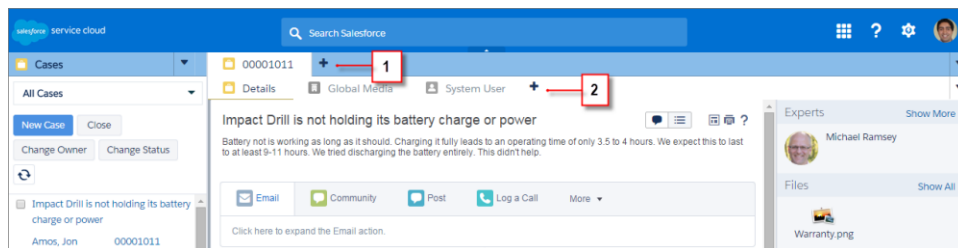
Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### A Console's Primary Tabs and Subtabs










(1) A primary tab is the main item to work on, such as an account. (2) A subtab is a related item on a primary tab, such as an account's contact. Salesforce doesn't limit the number of tabs you can display.





When viewing tabs, \* appears on tabs where you haven't saved changes, except for reports, Visualforce pages, or your organization's setup pages. ▲ appears on tabs where you need to fix errors. If your administrator has added external domains to a console's whitelist, tabs can display pages outside of Salesforce. New tabs don't appear when you click a custom button or change a record's type, owner, or territory; instead, the current tab goes to the item you selected.

You can do a variety of things with tabs from the tab bar by clicking ▼ and selecting an option, such as closing tabs, refreshing tabs, showing keyboard shortcuts, and more. To rearrange a tab, drag it to a new position along the tab bar. Tabs maintain their status as primary tabs or subtabs, meaning that you can't move primary tabs to the subtabs bar or vice versa. Rearranging tabs isn't available for Internet Explorer® 7.

If your administrator has turned on multi-monitor components, you can pop out primary tabs from your browser and drag them to any location on your screen to personalize the way you work. Just click ▼ and select **Pop out primary tabs**. To return primary tabs to their original browser, click ▼ and select **Pop tabs back into console**.

To copy the URL of a console tab and send it to another user, click  and select  next to the tab's name. If you're sending the URL to a non-console user, choose to create a standard Salesforce URL from the Link to Share dialog box. Then, press CTRL+C to copy the URL. To add a new tab to your console in which to paste a URL you've copied, click . In the text box, press CTRL+V to paste the URL, then click **Go!**. You can paste a console URL or a standard Salesforce URL into a new tab.

To pin a frequently visited primary tab to the tab bar for quick access, click  and select . When a tab is pinned, it's moved to the front of the tab bar and its text is removed to provide more screen space. To unpin a tab, click  and select .

To bookmark a favorite or occasionally visited tab for quick access, click  and select . When a tab is bookmarked, it's moved to the History component in the footer (formerly named Most Recent Tabs). To remove a bookmarked tab, click  and select , or click **Remove** next to the tab in the History component. See [View Bookmarks or Recently Used Tabs in a Salesforce Console](#) on page 55.



**Warning:** If you click **Cancel** on a newly created item that you haven't saved, the item and its tab are deleted and aren't sent to the Recycle Bin.



**Note:** If your administrator adds [custom console components](#), additional functionality might be available for you to work with in the sidebars next to tabs.



**Tip:** To reopen the last tab you closed, press SHIFT+C or click  and select **Reopen last-closed tab**. You can reopen up to ten closed tabs.

#### SEE ALSO:

[Salesforce Console Navigation Tab](#)

[Salesforce Console Tabs](#)

[Use a Salesforce Console](#)

## View Bookmarks or Recently Used Tabs in a Salesforce Console

If set up by your administrator, you can quickly access any primary tabs that you've bookmarked or recently used in a console without having to search Salesforce.



**Note:** With Summer '15, Most Recent Tabs was renamed History and bookmarks were added to it to give you a more streamlined experience for finding and retrieving tabs. These features aren't available in Internet Explorer® 7 and 8.

To view any bookmarked or recently used primary tabs, click **History** in the console's footer. Then click the Bookmarks or Recent Tabs column and select a tab. You can get each tab's URL to send it to another user, or remove bookmarks and clear recently used tabs to start from scratch. Next to each recent tab, you can access up to ten subtabs when they're available. Items that don't display as tabs, such as meeting request overlays, don't display in the History footer.

#### SEE ALSO:

[Guidelines for Working with Salesforce Console Tabs](#)

[Use a Salesforce Console](#)

#### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

## Resize and Minimize Pinned Lists in a Salesforce Console

If an administrator has turned on pinned lists and chosen where they display on screen, you can resize and minimize the lists.

To resize a pinned list, click the right or bottom margin of the list and drag it to the size you want. To minimize a pinned list, click the arrow on the right or bottom margin. To display the list again, click the arrow once more. If you haven't yet selected a record from a list, the list automatically displays full screen.

SEE ALSO:

[Use a Salesforce Console](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud


Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

## Work with Keyboard Shortcuts in a Salesforce Console

Keyboard shortcuts let you quickly perform actions by pressing keys instead of having to use a mouse.

Keyboard shortcuts can make working with a console more efficient. For example, instead of typing case details and then using a mouse to click **Save**, an administrator can create a shortcut so that you can type case details and press CTRL+S to save cases without switching to your mouse. Only administrators can create or customize shortcuts.

To view an overlay that lists shortcuts for a console, press SHIFT+K or click  and select **Show Keyboard Shortcuts**. If a shortcut appears dimmed on the overlay, it hasn't been enabled or it's been customized.

Keyboard shortcuts aren't case sensitive, even when you press SHIFT before a letter key. For example, SHIFT+b is the same as SHIFT+B. If CTRL, ALT, or SHIFT is in a keyboard shortcut, the sequence of those keys doesn't matter. For example, CTRL+ALT+A is the same as ALT+CTRL+A.

SEE ALSO:

[Default Keyboard Shortcuts for a Salesforce Console](#)

[Use a Salesforce Console](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

## Default Keyboard Shortcuts for a Salesforce Console

These shortcuts are automatically available for a console, and an administrator can customize or turn them off.

Action (Keyboard Shortcut)	Description	Key Command
Enter keyboard shortcuts mode	Activates keyboard shortcuts in a browser displaying a console.	ESC
Go to the navigation tab	Selects the navigation tab.	V
Go to field on tab	Selects details on a tab.	SHIFT+S
Go to the primary tabs	Selects the row of primary tabs.	P
Go to the subtabs	Selects the row of subtabs on a primary tab.	S
Go to list view	Selects the list view.	N
Go to the first list view item	Selects the first item on the list view.	SHIFT+F
Go to header search box	Moves the cursor to the header search box.	R
Go to footer	Moves the cursor to footer components. Not supported for Microsoft® Internet Explorer® versions 7 or 8 or for right-to-left languages. If you choose the Macros or Presence component, press ESC to move the cursor to other components.	F/RIGHT ARROW or LEFT ARROW/1 through 9
Move left	Moves the cursor left.	LEFT ARROW
Move right	Moves the cursor right.	RIGHT ARROW
Move up	Moves the cursor up.	UP ARROW
Move down	Moves the cursor down.	DOWN ARROW
Open item in an inactive tab	Opens the selected item in a new tab without shifting focus.	CTRL+click for PCs; CMD+click for Macs
Open drop-down button on tabs	Opens the drop-down button on tabs to select more actions.	D
Open tab	Opens a new tab.	T
Close tab	Closes a selected tab.	C
Reopen last-closed tab	Reopens the last-closed primary tab.	SHIFT+C

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

Action (Keyboard Shortcut)	Description	Key Command
Refresh tab	Refreshes a selected tab.	SHIFT+R
Enter	Activates a command.	ENTER
Get link to share	Opens the Link to Share dialog box on the selected tab.	U
Show keyboard shortcuts	Opens an overlay that lists keyboard shortcuts.	SHIFT+K
Edit	Switch from detail to edit page.	E
Save	Saves changes to the selected tab.	CTRL+S
Hide or show pinned list	Toggles the appearance of a pinned list.	SHIFT+N
Hide or show left sidebar	Toggles the appearance of the left sidebar and any of its components.	SHIFT+LEFT ARROW
Hide or show right sidebar	Toggles the appearance of the right sidebar and any of its components.	SHIFT+RIGHT ARROW
Hide or show top sidebar	Toggles the appearance of the top sidebar and any of its components.	SHIFT+UP ARROW
Hide or show bottom sidebar	Toggles the appearance of the bottom sidebar and any of its components.	SHIFT+DOWN ARROW
Zoom in or out on primary tabs	Zooms in or out on primary tabs by toggling the appearance of the header, footer, and pinned list.	Z

**SEE ALSO:**



[Work with Keyboard Shortcuts in a Salesforce Console](#)



[Use a Salesforce Console](#)

## Guidelines for Working with Salesforce Console Multi-Monitor Components




Move portions of a console to different areas of your computer screens so that you can view data in ways that help you work best.

After an administrator turns on multi-monitor components, you can pop out and drag primary tabs and Open CTI SoftPhones to other locations on your screens. You can also move the History component, Live Agent chats (but not the footer component), and any custom console components or Force.com Canvas components in a console's footer. To use multi-monitor components, you might need to update your browser's settings to: (1) allow popup windows; (2) open links in windows, not tabs.

To pop out and drag primary tabs, click  and select **Pop out primary tabs**. To return primary tabs to their original browser, click  and select **Pop tabs back into console**.

To pop out and drag components in a console's footer, click the items and select . To return items to their original browser, click . To refresh a popped out footer component, right-click on it and choose **Reload** or **Refresh**. When you refresh a popped out footer component, it's returned to the console's footer.

If pinned lists are set up, a playground appears as a blank area next to lists and it says **Drag Footer Components Here**. Use this area to keep track of Salesforce windows among several applications on your screens.

-  **Important:** Popped out items close and lose their positions on your screens when you: (1) log out of Salesforce; (2) click **Setup**; (3) click a link to leave a console; (4) refresh or close your browsers.
-  **Note:** You can't pop out SoftPhones built with versions 3.0 or 4.0 of the CTI Toolkit.
-  **Tip:** Any items popped out of the console have blue headings to help you locate them among other windows on your screens. To use keyboard shortcuts from popped out components, focus on the correct window. For example, if you're focused on a window with the navigation tab, the default shortcut to go to primary tabs, key command P, won't work.

SEE ALSO:

[Use a Salesforce Console](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud



Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost


## Add Notes to Records in a Salesforce Console

The interaction log helps you quickly add notes to records on a console's primary tabs.

If you're assigned to an interaction log layout, you can access the log from a console's footer. Logs appear on items that have an Activity History related list, such as accounts and contacts, but not solutions. Logs aren't available for reports, dashboards, Salesforce CRM Content, the Article Management tab, or Visualforce pages.

To show or hide the interaction log, hover over the log's border and click  or . To resize the interaction log and a detail page, drag the bar in between them. To help you quickly save notes on customers, when a contact appears on a subtab, the contact's name is added to the log's `Name`. However, you can change the `Name` before you save a log. When you click **Clear Log** to remove notes or a `Subject`, any saved notes aren't removed—they're stored on the record's Activity History related list. For easy review and retrieval, all logs are saved as tasks on records' Activity History related list.

 **Note:** Administrators can customize the fields that appear on logs.

 **Tip:** If you use a SoftPhone, click **Add Call Data** to add a call's date and time to the log. When screen popup windows appear from inbound calls, click **End Call** to end the call and save any updates that you've made to the log.

### SEE ALSO:

[Use a Salesforce Console](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud

Available in: **Performance and Developer** Editions with the Sales Cloud

Available in: **Enterprise and Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To view the interaction log:

- "Read" on tasks

To save notes in the interaction log:

- "Edit" on tasks



## View Push Notifications in a Salesforce Console

Push notifications are visual indicators that appear when a record or field you're viewing was changed by others.

After an administrator configures push notifications, visual indicators for record or field changes appear on lists and detail pages. When changes happen, detail pages automatically refresh and show updates, or notifications appear as dialog boxes. Lists display notifications as:

### EDITIONS

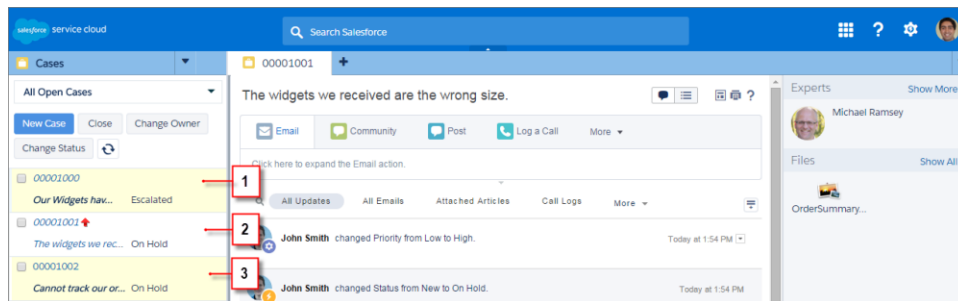
Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud


Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### Push Notifications for Lists



(1) Yellow when a record changes. (2) Blue if it's the last item you viewed. (3) Bold and italic when a field specified by an administrator changes.

 **Note:** These objects and their fields are available for push notifications: accounts, contacts, cases, leads, opportunities, campaigns, tasks, and custom objects.


SEE ALSO:


[Use a Salesforce Console](#)



## Use a SoftPhone with a Salesforce Console



A SoftPhone in a console lets you view records related to phone calls, as well as receive, place, and transfer calls.

You can access a SoftPhone if you're assigned to a call center using a CTI adapter built with version 3.0 or 4.0 of the CTI Toolkit, or if you're using a call center built with Open CTI.

Click  to display a SoftPhone from the footer of a console. Use the interaction log to write notes in call logs. A call log is an activity record that automatically generates when you use a SoftPhone, and it tracks the phone number, caller, date, time, and duration of the call. You can view call logs in the Activity History related list of any record associated with the call.

 **Important:** Data might not save properly when you: (1) Refresh your browser during a call; (2) use a SoftPhone in multiple browsers simultaneously; (3) switch to a SoftPhone in a browser without a console.

 **Note:** If you're using a CTI adapter built with version 4.0 of the CTI Toolkit,  displays in the footer even when you're not connected to the adapter.

 **Tip:** You can hide the SoftPhone by clicking , but you can't move it away from the footer of a console. You can also resize the height of a SoftPhone by dragging the bar on top of it. When you click **End Call**, any updates you've made to the interaction log are saved before the call ends.

SEE ALSO:

[Use a Salesforce Console](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost


### USER PERMISSIONS



To view and use the SoftPhone:

- Member of a call center



## Find Knowledge Articles in a Salesforce Console

If Salesforce Knowledge and the Knowledge sidebar is set up by an administrator, articles automatically appear when you select a case in a console.

To help you solve cases faster, suggested articles appear in the sidebar as you type details into a case's `subject`. Only articles updated within the last 30 days appear, but you can view older articles by specifying a search term or filtering search results. To filter articles by a specific category, language, or validation status, click  and choose filter options. To access these filters, validation status and multilingual articles must be enabled. An administrator determines which languages are available for articles. The columns available in the sidebar are `New`, `Article Title`, and `Most Viewed`. You can drag the bar in between the columns to resize them, but you can't add, remove, or rearrange columns.

To find articles to help you solve a case, click , type keywords into `Search`, and click **Go**. To attach an article to a case, click the checkbox next to the article and click **Attach to Case**. You can only attach an article to a saved case.  displays next to an article already attached to a case.

To change the number of articles displayed, click the article count indicator in the lower left corner of the sidebar and choose a setting. You can view 10, 25, 50, 100, or 200 articles at a time. When you change this setting, you return to the first page of the list.

To show or hide the sidebar, hover over the scrollbar and click  or . You can drag the bar in between the articles sidebar and a detail page to resize the width of either one.

### SEE ALSO:

[Use a Salesforce Console](#)

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To view Salesforce Knowledge articles:

- "Read" on the article's article type

To add Salesforce Knowledge articles to cases:

- "Edit" on cases

## Live Agent for Support Agents

Welcome to Live Agent for support agents! Live Agent is a comprehensive chat solution that makes it easy for you to support customers.

As a support agent, you assist dozens of customers with their support issues every day. Live Agent is a chat solution that's fully integrated with the rest of Salesforce, making it easy for you to access all the information you need about your customers in a single workspace. In addition, Salesforce leverages the power of the Service Cloud, giving you access to important tools like a knowledge base and pre-defined support messages, that let you assist your customers and close cases more quickly.

Whether you're a seasoned veteran or new to Live Agent, there are several tools at your disposal that make it easy to assist multiple customers at the same time with chat. Let's get started.

### IN THIS SECTION:

1. [Change Your Live Agent Status](#)  
Change your Live Agent status to control when you're available to receive new and transferred chats.
2. [Assist Customers with Chat](#)  
Use Live Agent chat in the Salesforce console to help customers with their issues with the support of robust customer service tools.

### SEE ALSO:

[Live Agent for Support Supervisors](#)

### EDITIONS

Available in: **Salesforce Classic**

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

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

### USER PERMISSIONS

To chat with visitors in Live Agent in the Salesforce console:

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

## Change Your Live Agent Status

Change your Live Agent status to control when you're available to receive new and transferred chats.

In Live Agent, you can set your online status to online, away, or offline. When you exit Live Agent, your status automatically changes to offline and any active chat sessions end.

1. Click the Live Agent footer widget to open the chat monitor.
2. Click the drop-down arrow in the upper right corner of the chat monitor to view your status options.
3. Select your status.

### IN THIS SECTION:

[Live Agent Statuses](#)

Live Agent statuses define how you can interact with customers while you're online, away, or offline.

## Live Agent Statuses

Live Agent statuses define how you can interact with customers while you're online, away, or offline.

Status	Description
Online	You can receive and accept incoming chats and transfers.
Away	You can continue any chat sessions you've already started, but you can't accept incoming chats or transfers.
Offline	You can't accept incoming chats or transfers, and no chats can be routed to you.

### EDITIONS

Available in: Salesforce Classic

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

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

### USER PERMISSIONS

To chat with visitors in Live Agent in the Salesforce console:

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

### EDITIONS

Available in: Salesforce Classic

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

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

## Assist Customers with Chat

Use Live Agent chat in the Salesforce console to help customers with their issues with the support of robust customer service tools.

Of course you can chat with customers using Live Agent, but using Live Agent in the Salesforce console gives you access to several other Service Cloud products that let you assist customers in a comprehensive way.

### IN THIS SECTION:

#### [Chat with Customers](#)

Accept incoming chat requests to begin chatting with customers.

#### [Access Customer Details during a Chat](#)

When you accept a chat request, a details tab for that chat opens automatically. The details tab includes information about the visitor and lets you look up records related to the chat, such as contacts and cases.

#### [Send Quick Text Messages in Chats](#)

Send pre-written messages to chat customers to send common messages more quickly.

#### [Transfer Files During a Chat](#)

Give customers the ability to upload and transfer files during a chat so they can easily share more information about their issues.

#### [Transfer Chats](#)

There are several ways you can transfer chats to agents. Transfer a chat session to a specific agent, send a transfer request to all available agents with a particular skill, or send a transfer request to all agents who are associated with a particular chat button.

#### [Send a Chat Conferencing Request](#)

As wise as support agents are, sometimes a single support agent doesn't have all the information that's required to solve a customer's problem. Chat conferencing lets you invite one or more agents into your customer chats. That way, your agents can turn boring chats into veritable support parties for your customers—all without disrupting the flow of conversation! Send a chat conferencing request to ask another agent to join you in a customer chat.

#### [Attach Articles to Live Agent Chats](#)

Use the Knowledge One widget to find articles that help solve customer issues during chats.

#### [Attach Records to Chat Transcripts](#)

Search for or create records to attach to a chat transcript as you chat with customers.

#### [Request Help with a Chat](#)

When you need help with a chat, you can raise a virtual flag to alert a supervisor. Supervisors are alerted that you need help, and they can respond directly via the console.

#### [Block Unwanted Chat Customers](#)

You can block chats from troublesome customers right from the Salesforce console. For example, if a customer is using abusive language or sending spam messages, you can block that user from starting a new chat.

#### [End a Chat Session](#)

End a chat session after you've finished chatting with a customer and updating the records related to their chat.

### EDITIONS

Available in: Salesforce Classic

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

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

### USER PERMISSIONS

To chat with visitors in Live Agent in the Salesforce console:

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

[View Customer Records](#)

Salesforce automatically creates some records when a chat ends. These records store information about chat customers and their interactions with agents.

## Chat with Customers

Accept incoming chat requests to begin chatting with customers.

When you receive a new chat or transfer request, the pending request appears in your chat monitor. You can see the deployment or website the chat came from, the customer's name (if it's available), and the number of minutes the request has been waiting to be answered.

You can chat with several customers at the same time. Each chat session opens in a separate primary tab.

1. In the chat monitor, click **Accept** on the chat request.  
The chat log opens in a new primary tab.
2. Type your message to the customer in the message field.
3. Click **Send** or hit ENTER on your keyboard to send your message to the customer.
4. Click **End Chat** when you're done assisting the customer.  
If the customer ends the chat first, a notice appears in the chat log.

### SEE ALSO:

[Send Quick Text Messages in Chats](#)

[Attach Articles to Live Agent Chats](#)

[Transfer Chats](#)

[Transfer Files During a Chat](#)

[Attach Records to Chat Transcripts](#)

[End a Chat Session](#)

### EDITIONS

Available in: **Salesforce Classic**

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

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


### USER PERMISSIONS

To chat with visitors in Live Agent in the Salesforce console:

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

## Access Customer Details during a Chat

When you accept a chat request, a details tab for that chat opens automatically. The details tab includes information about the visitor and lets you look up records related to the chat, such as contacts and cases.

- To search for a record, type a name in the relevant box in the Related Entities section of the page, then click . To associate a record you find to the chat, select it from the search results list and click **Save**.

In older organizations, you could access records and visitor details from the Related Entities panel during chats. However, starting with Summer '14, the Related Entities panel in the details tab isn't available for new Live Agent customers. Existing customers will continue to have access to the Related Entities panel.

- Once you associate an existing record to the chat, click the name of the record to open it in a new tab.
- To create a new record, click **New Case**, **New Lead**, **New Contact**, or **New Account**.

### EDITIONS

Available in: Salesforce Classic

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

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

### USER PERMISSIONS

To search for and view a record:

- "Read" on the object
- AND
- "Create" on Live Chat Transcripts

To create a new record:

- "Create" on the object
- AND
- "Create" on Live Chat Transcripts

To edit a record:

- "Edit" on the object
- AND
- "Create" on Live Chat Transcripts

To delete a record:


- "Delete" on the object
- AND
- "Create" on Live Chat Transcripts



## Send Quick Text Messages in Chats

Send pre-written messages to chat customers to send common messages more quickly.

Quick Text lets you respond to customers more efficiently by letting you insert predefined messages, such as greetings or common troubleshooting steps, into your chat messages.

 **Note:** If you don't have access to Quick Text, contact your administrator.




1. While chatting with a customer, type ; in the message field.  
A list of Quick Text messages appears. The messages you've used most recently appear at the top of the list.
2. To see additional Quick Text messages that are available, type a word or phrase.  
A list of messages that include those words appears.
3. To see the title and full text of a message, click it once or highlight it using the arrow keys on your keyboard.  
The full message appears at the bottom of the Quick Text list.
4. To select a message and add it to your chat, double-click it or highlight it and hit ENTER on your keyboard.
5. To send the message, click **Send** or hit ENTER on your keyboard.

## Transfer Files During a Chat

Give customers the ability to upload and transfer files during a chat so they can easily share more information about their issues.

For example, if a customer is receiving an error when they try to complete a process, they can upload and transfer a screenshot of the error message to the agent.

Before a customer can upload a file, you must associate the chat with a record, such as a case or a contact. Since the chat transcript isn't created until you end the chat, you can't attach a customer's file directly to the transcript during the chat.

1. Click  to search for or create a record to attach to the chat.
2. Click the file transfer icon (  ).  
  
 **Note:** A customer can't upload a file until you initiate the file transfer by clicking the file transfer icon. This helps prevent customers from uploading unsolicited or potentially dangerous files into the chat.
3. Select the record you chose in the first step to attach the transferred file to.  
The customer receives a prompt to upload their file to the chat window.
4. When the customer has sent the file through the chat, click the link in the chat log to view the file.

### EDITIONS

Available in: Salesforce Classic

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

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

### USER PERMISSIONS

To access Quick Text while chatting with visitors in Live Agent:

- "Read" on Quick Text

### EDITIONS

Available in: Salesforce Classic

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

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

### USER PERMISSIONS

To use in the Salesforce console:

- "Live Agent" is enabled and set up

AND

Live Agent is set up in a Salesforce console app

## Transfer Chats

There are several ways you can transfer chats to agents. Transfer a chat session to a specific agent, send a transfer request to all available agents with a particular skill, or send a transfer request to all agents who are associated with a particular chat button.

You may need to transfer chat sessions to other agents if a customer has an issue another agent can solve, or because you need to pass along some of your chat sessions to accept new requests. When you transfer a chat to a skill group, it's available to all online agents with that skill, regardless of their capacities and how many active sessions they're already engaged in.

When an agent transfers a chat, any records attached to the chat transcript will open in the other agent's workspace when another agent accepts the chat. This way, the agent who accepts the transferred chat has all the information to start assisting the customer right away, without having to search for related records.

If an agent tries to transfer a chat, but has open records that are unsaved or unattached to the chat transcript, the first agent will be prompted to save those changes before completing the chat transfer. This way, the agent who accepts the transfer will see the most up-to-date details about the customer.

If the accepting agent does not have permission to view certain records or objects, those items will not open in the transferred workspace.

1. While chatting with a customer, click **Transfer**.
2. Choose the skill group or chat button queue to which you want to transfer the chat.



**Note:** You can transfer a chat to a skill group or a chat button queue, but not both.

3. Select All Qualified Agents to send the transfer request to all online agents in the skill group, or choose the name of a specific agent.
4. If the transfer is accepted, you don't need to do anything else. If it's rejected, you can try transferring it to a different agent or skill group.



**Warning:** When another agent accepts your transfer request, your chat workspace closes automatically, including the chat log and any related subtabs. Make sure to save any changes to these records before you transfer the chat, since any unsaved changes will be lost when the workspace closes.

### EDITIONS

Available in: Salesforce Classic

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

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


### USER PERMISSIONS


To chat with visitors in Live Agent in the Salesforce console:

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

## Send a Chat Conferencing Request

As wise as support agents are, sometimes a single support agent doesn't have all the information that's required to solve a customer's problem. Chat conferencing lets you invite one or more agents into your customer chats. That way, your agents can turn boring chats into veritable support parties for your customers—all without disrupting the flow of conversation! Send a chat conferencing request to ask another agent to join you in a customer chat.

 **Note:** You can conference in a single agent, or send a request to all agents and the first to accept will join the conference. You can conference multiple agents into a chat, but you need to send each request individually.

1. While you're chatting with a customer, click .
2. Select the skill group of the agents that you want to transfer into the chat.
3. Select whether to send the conference request to all agents with that skill or to a specific agent.
4. Click **Conference** to send the conference request.

If the agent accepts the conference request, you see a notification in the chat log, and that agent can start chatting with you and the customer. If the agent declines the request, you see a notification above the chat log. The customer receives a notification when an agent joins or leaves a conference.

5. If you decide to exit the conference, click **Leave**, and then click **Leave** again.  
If the other agent leaves the conference, you'll see a notification in the chat log.

Any saved and attached records will open for other agents who join the conference. But only the originating or longest-attending agent will be able to attach other records. If the longest-attending agent attaches or removes records during the conference, other agents won't see these changes in their workspaces.

For more about transferring chats and workspaces, see [Transfer Chats](#).

### EDITIONS

Available in: Salesforce Classic

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

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

### USER PERMISSIONS

To create and edit configurations:

- "Customize Application"




To enable chat conferencing:


- "Enable Live Agent Chat Conference"

## Attach Articles to Live Agent Chats

Use the Knowledge One widget to find articles that help solve customer issues during chats.

The Knowledge One widget is only available if your organization uses Knowledge and your administrator has included the tool in your Salesforce console app.

1. When chatting with a visitor, click an article from the list in the Knowledge One widget. A tab with the full text of the article opens.
2. To search for a specific article in the list, type a word or phrase in the text box in the widget and click  or press ENTER.
  - Alternatively, click  at the top of the widget to search all articles, including those not in the list. The main widget search gives you the option of limiting your results to specific types of articles.
  - To filter your search results, click **Filters** and choose how you want to restrict your search.
3. When you find the article you want, click , then click **Share**. The text of the article appears in the chat text box.
4. Click **Send** or press ENTER on your keyboard to send the article to the visitor.

 **Note:** You can only send articles to visitors if your administrator has set up a Chat Answer field on articles. If this field isn't set up, you can view articles but can't include them in chats.

### EDITIONS

Available in: Salesforce Classic

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

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

### USER PERMISSIONS






To search for and view an article:

- "Read" on the article type

## Attach Records to Chat Transcripts

Search for or create records to attach to a chat transcript as you chat with customers.

Find existing records or create new ones to associate with a transcript as you chat with customers. For example, you can create a new case based on the customer's issue, or search for the customer's existing contact record and attach these records to the transcript for later reference. You can attach standard or custom records to your chat transcripts.

1. While chatting with a customer, click  to attach a record to the transcript.
  -  **Note:** You can only attach one of each type of record to a chat transcript. For example, you can't attach more than one case to a single transcript.
2. To search for an existing record:
  - a. Click the search icon (  ) in the records window next to the type of record you want to search for.
  - b. Type the name of the record and hit ENTER.  
The record opens in a new tab.
  - c. Click the attach icon (  ) again.
  - d. Select the check box next to the record you searched for to link it to the chat transcript.
3. To create a new record:
  - a. Click the create icon (  ) next to the type of record you want to create.
  - b. Complete the information in the new record and save it.  
The record will automatically link to the transcript once the record is created.
4. After you complete the chat with the customer, exit the chat.
5. If prompted, click **Save**.  
The records you linked are now attached to the transcript. You can access them from the transcript's detail view.

SEE ALSO:

[Live Agent Transcripts](#)

### EDITIONS

Available in: Salesforce Classic

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

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

### USER PERMISSIONS

To search for and view a record:

- "Read" on the object  
AND  
"Create" on Live Chat Transcripts

To create a new record:

- "Create" on the object  
AND  
"Create" on Live Chat Transcripts

To edit a record:


- "Edit" on the object  
AND  
"Create" on Live Chat Transcripts

To delete a record:


- "Delete" on the object  
AND  
"Create" on Live Chat Transcripts

## Request Help with a Chat

When you need help with a chat, you can raise a virtual flag to alert a supervisor. Supervisors are alerted that you need help, and they can respond directly via the console.

1. In the interaction pane, click the  icon.
2. Enter a message briefly explaining what help you need.
3. Click **Raise Flag**.

Either you or a supervisor can lower the flag when your issue is resolved.


If you don't see the  icon in your console, contact your Salesforce administrator to enable it.

## Block Unwanted Chat Customers


You can block chats from troublesome customers right from the Salesforce console. For example, if a customer is using abusive language or sending spam messages, you can block that user from starting a new chat.

Blocking a chat ends the chat and blocks any new chat requests coming from that user's IP (Internet Protocol) address.

If your organization is receiving many spam chats from a particular region, your administrator can block entire ranges of IP addresses.

1. In the interaction pane, click the  icon.
2. (Optional) Enter a comment explaining why you're blocking this visitor.
3. Click **Block**.

When you click **Block**, you immediately end the chat, and the visitor sees a notification that an agent ended the chat. If multiple agents are engaged in a conference, **Block** immediately ends the conference, and the other agents are also notified.

If you don't see the  icon in your console, contact your Salesforce administrator to enable it. Only an administrator can unblock an IP address.

### EDITIONS

Available in: Salesforce Classic

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

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

### EDITIONS

Available in: Salesforce Classic

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

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

### USER PERMISSIONS

To chat with visitors in Live Agent in the Salesforce console:

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

## End a Chat Session

End a chat session after you've finished chatting with a customer and updating the records related to their chat.

After you end a chat with a customer, the primary and secondary tabs related to that chat remain open in your console. Close them to save your work and free up space to take on more chats.

1. Close the primary tab for the chat.
2. If prompted, click **Save**.

## View Customer Records

Salesforce automatically creates some records when a chat ends. These records store information about chat customers and their interactions with agents.

These records are mostly used internally to provide an audit trail about your customers and their chats with agents. However, you can access these records yourself if you ever need them.

1. To access customer records in the Salesforce console, select the type of record you want to view from the Salesforce console navigation list.  
A list of those records will appear in the main window.

### IN THIS SECTION:

#### [Live Agent Session Records](#)

Every time your agents log into Live Agent, a Live Agent session record is automatically created. These 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.

#### [Live Agent Visitor Records](#)

Every time an agent chats with a customer, Salesforce automatically creates a visitor record that identifies the customer's computer.

#### [Live Agent Transcripts](#)

A Live Agent transcript is a record of a chat between a customer and an agent. Salesforce automatically creates a transcript for each chat session.

### EDITIONS

Available in: Salesforce Classic

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

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

### USER PERMISSIONS

To chat with visitors in Live Agent in the :

- Live Agent is enabled, set up, and included in a app

### EDITIONS

Available in: Salesforce Classic

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

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

### USER PERMISSIONS

To view customer records:

- "Read" on the record type

For agents to use Live Agent:


- "API Enabled" administrative permission

## Live Agent Session Records

Every time your agents log into Live Agent, a Live Agent session record is automatically created. These 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.

Use Live Agent sessions to find and edit information about your support agents' chats with customers. For example, you can create a list called "Today's Sessions" to view chat activity that occurred in one day.


You can associate session records with cases, accounts, contacts, and leads or link them with other objects through custom lookup fields.

 **Note:** If you have the correct permissions, you can create, view, edit, or delete session records, just like other record types in Salesforce. However, session records are meant to provide a paper trail for the chats between your agents and customers, so we don't recommend tampering with these records in most cases.

## Live Agent Visitor Records

Every time an agent chats with a customer, Salesforce automatically creates a visitor record that identifies the customer's computer.

Each new visitor is associated with a session key, which Salesforce creates automatically. A session key is a unique ID that is stored in the visitor record and on the visitor's PC as a cookie. If a customer participates in multiple chats, Salesforce uses the session key to link the customer to their visitor record, associating that record to all related chat transcripts.

 **Note:** If you have the correct permissions, you can create, view, edit, or delete visitor records, just like other record types in Salesforce. However, visitor records are meant to provide a paper trail that associates your customers with their chat transcripts, so we don't recommend tampering with these records in most cases.


## Live Agent Transcripts

A Live Agent transcript is a record of a chat between a customer and an agent. Salesforce automatically creates a transcript for each chat session.

When a chat ends successfully—that is, when the chat is ended by a customer or an agent—the chat transcript is created as soon as the agent closes the chat window and any related tabs.

If a chat is disconnected or experiences another error, Salesforce still creates a chat transcript for it, though it takes up to 30 minutes to create the transcript after the chat is disconnected.

You can associate a transcript with cases, accounts, contacts, and leads, or you can link it to other objects.

 **Note:** If you have the correct permissions, you can create, view, edit, or delete chat transcripts, just like other record types in Salesforce. However, chat transcripts are meant to provide a paper trail for the chats between your agents and customers, so we don't recommend tampering with these records in most cases.

### EDITIONS

Available in: Salesforce Classic

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

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

### EDITIONS

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

### EDITIONS

Available in: Salesforce Classic

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

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



## IN THIS SECTION:

[Live Agent Transcript Fields](#)

Live Agent transcript fields help you track information about your agents' chats with customers.

[Live Chat Transcript Events](#)

Live chat transcript events automatically track events that occur between your agents and customers during chats.

## Live Agent Transcript Fields

Live Agent transcript fields help you track information about your agents' chats with customers.

A Live Agent transcript has the following fields, listed in alphabetical order. Depending on your page layout and field-level security settings, some fields might not be visible or editable.

Field	Definition
Abandoned After	The amount of time in seconds an incoming chat request went unanswered by an agent before the chat was disconnected by the customer
Account Name	The name of the account associated with the transcript
Agent Average Response Time	The average time that it took an agent to respond to a chat visitor's message
Agent Maximum Response Time	The maximum time it took an agent to respond to a chat visitor's message
Agent Message Count	The number of messages an agent sent during the chat
Agent Skill	The skill associated with the live chat button used to initiate the chat
Body	The transcribed chat between an agent and a visitor
Browser	The type and version of the browser used by the visitor
Browser Language	The visitor's browser language selection
Case	The case associated with the chat
Chat Button	The chat button that the visitor clicked to initiate the chat
Chat Duration	The total duration of the chat in seconds
Contact Name	The name of the contact that participated in the chat  Note that contacts and visitors are not the same. See <a href="#">Live Chat Visitor</a> for more information.

## EDITIONS

Available in: **Salesforce Classic**

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

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

Field	Definition
Created By	The user who created the transcript, including creation date and time (Read only)
Created Date	The date and time the transcript was created (Read only)
End Time	The time the chat ended
Ended By	Indicates whether the visitor or the agent ended the chat
Last Modified By	The user who last modified the transcript, including date and time (Read only)
Last Modified Date	The date and time the transcript was last modified (Read only)
Lead	The name of the lead that was generated by the chat or discussed during the chat
Deployment	The deployment from which the visitor initiated the chat
Live Chat Transcript	<p>Unique, numerical identifier automatically assigned to the transcript.</p> <p>Administrators can modify the format and numbering for this field. Transcript numbers usually increase sequentially, but sometimes they can skip numbers in a sequence.</p>
Live Chat Visitor	<p>Unique, numerical identifier automatically assigned to the visitor. Administrators can modify the format and numbering for this field. Visitor numbers usually increase sequentially, but sometimes they can skip numbers in a sequence.</p> <p>Note that visitors and contacts are different: a visitor might be a contact, but this is not a requirement, and there is no relationship between contacts and visitors.</p>
Location	The visitor's geographic location. Either the city and state, or city and country (if the visitor is located outside of the United States)
Owner	<p>The name of the transcript owner. By default, the owner is the user who originally created the transcript (for example, the agent who answered the chat).</p> <p>You can select a different user as the owner, or assign the transcript to a queue. When assigning transcripts to other users, make sure those users have the "Read" permission on live chat transcripts.</p>
Platform	The user's operating system
Referring Site	<p>Site the visitor was on before they came to your website.</p> <p>For example, if the visitor used Google to search for your organization's website, the referring site is Google.</p>
Request Time	The time that the visitor initially requested the chat

Field	Definition
Screen Resolution	The screen resolution used by the visitor
Start Time	The time that the agent answered the chat request
Status	Completed or Missed. A missed chat was requested but not answered
User Agent	A string that identifies the type of browser and operating system the visitor used
Visitor Average Response Time	The average time that it took a visitor to respond to an agent comment
Visitor Maximum Response Time	The maximum time it took a customer to respond to an agent's message
Visitor IP Address	The IP address of the computer that the visitor used during the chat
Visitor Message Count	The number of messages a visitor sent during the chat
Wait Time	The total amount of time a chat request was waiting to be accepted by an agent

### Live Chat Transcript Events

Live chat transcript events automatically track events that occur between your agents and customers during chats.

You can edit live chat transcripts to track events that occur between your agents and customers during live chats. You can add the following events to a live chat transcript:

Event	Description
Chat Requested	Visitor requested a chat
Queued	Chat request was placed in queue
Routed (Push)	Chat request was routed to agent
Routed (Choice)	Chat request was routed to all available, qualified agents
Accepted	Chat request was accepted by agent
Critical Wait Alert Time Reached	Agent failed to respond to the customer's message before reaching the critical wait alert time
Critical Wait Alert Cleared	Agent responded to the customer's message after the critical wait alert was received
Transfer Requested	Agent requested chat transfer
Transfer Accepted	Chat transfer was accepted by agent

### EDITIONS

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<b>Event</b>	<b>Description</b>
Transfer Request Canceled	Chat transfer request was canceled by the agent who sent the request
Transfer Request Declined	Chat transfer request was declined by the agent who received the request
Transferred to Button	Chat was transferred to a button
Transfer to Button Failed	Chat transfer to button was unsuccessful
Chat Conference Requested	Agent sent a request to start a conference
Chat Conference Canceled	Conference request was canceled
Chat Conference Declined	Conference request was declined by an agent
Agent Joined Conference	An agent joined the conference
Agent Left Conference	An agent left the conference
File Transfer Requested	A file transfer was requested
File Transfer Canceled by Agent	File transfer was canceled by an agent
File Transfer Canceled by Visitor	File transfer was canceled by the visitor
File Transfer Succeeded	File transfer was successful
File Transfer Failed	File transfer failed
Canceled (Blocked)	An attempted chat was blocked via an IP blocking rule
Blocked by Agent	An agent blocked an active chat (creating an IP blocking rule)
Declined (Manual)	Chat request was declined by agent
Declined (Time-Out)	Chat request timed out while assigned to agent
Canceled (No Agent)	Chat request was canceled because no qualified agents were available
Canceled (No Queue)	Chat request was canceled because there was no room in queue
Canceled by Visitor	Visitor clicked <b>Cancel Chat</b>
Agent Left	Agent left chat
Visitor Left	Visitor left chat
Ended by Agent	Agent clicked <b>End Chat</b>
Ended by Visitor	Visitor clicked <b>End Chat</b>
Other	Another event occurred

## Live Agent for Support Supervisors

Welcome to Live Agent for support supervisors! Live Agent is a comprehensive chat solution that makes it easy for your agents to support customers. With Live Agent's supervisor tools, you can easily monitor your agents' activities, assist your agents in chats, and view data on your agents' chat sessions.

As a support supervisor, you oversee your employees to ensure that they provide the best customer support possible. Live Agent is a chat solution that's fully integrated with the rest of Salesforce, making it easy for you to access the information you need about your agents and their chat activity in a single workspace.

Whether you're a seasoned veteran or new to Live Agent, there are several tools at your disposal that make it easy to support and monitor your chat agents as they work with customers. Let's get started.

### IN THIS SECTION:

#### [The Live Agent Supervisor Panel](#)

The Live Agent supervisor panel is your one-stop shop to find information about your department's chat buttons and chat agents. From the supervisor panel, you can monitor agents' chat activities as they chat with customers and view customer traffic on specific chat buttons, all in real time. The supervisor panel is conveniently located in the Salesforce console, so it's easy to access it without switching out of the app.

#### [Assign Skills to Agents](#)

Assign skills to your agents as the expertise of your team evolves.

#### [Report on Live Agent Sessions](#)

Gain insight into your agents' chat activities by building reports about Live Agent chat sessions.

### SEE ALSO:

[Live Agent for Support Supervisors](#)

## The Live Agent Supervisor Panel

The Live Agent supervisor panel is your one-stop shop to find information about your department's chat buttons and chat agents. From the supervisor panel, you can monitor agents' chat activities as they chat with customers and view customer traffic on specific chat buttons, all in real time. The supervisor panel is conveniently located in the Salesforce console, so it's easy to access it without switching out of the app.

### IN THIS SECTION:

#### [Access the Supervisor Panel](#)

Access the supervisor panel conveniently from the Salesforce console to easily monitor your agents' chat activity.

#### [Agent Status List](#)

The agent status list in the supervisor panel gives you access to real-time information about your agents' chat activity.

### EDITIONS

Available in: Salesforce Classic

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

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

### USER PERMISSIONS

To chat with visitors in Live Agent in the Salesforce console:

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

### EDITIONS

Available in: Salesforce Classic

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

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

### Queue Status List

The queue status list in the supervisor panel gives you access to real-time information about your organization's chat buttons and queues.

### Monitor Your Agents' Chats

View your agents' chats from the supervisor panel as they help customers. You can monitor agents' performance and give them real-time feedback and help as they serve customers.

## Access the Supervisor Panel

Access the supervisor panel conveniently from the Salesforce console to easily monitor your agents' chat activity.

1. To access the supervisor panel in the Salesforce console, select **Live Agent Supervisor** in the console's navigation list.  
The supervisor panel appears in the main console window, giving you access to real-time information about your organization's chat buttons and agents.

### EDITIONS

Available in: Salesforce Classic

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

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


### USER PERMISSIONS

To use the Live Agent supervisor panel in the Salesforce console:

- Access to the Live Agent supervisor tab in a user profile or permission set, and included in a Salesforce console app

## Agent Status List

The agent status list in the supervisor panel gives you access to real-time information about your agents' chat activity.

Agent Detail	Description
Agent Name	The name of the agent.  <b>Note:</b> If a red flag appears next to the name, the agent has requested help. Respond via the chat detail module (far right).
Status	The agent's Live Agent status.
Action	The actions you can take to change the agent's status.
No. Chats in Progress	The number of chats that an agent is engaged in.
No. Requests Assigned	The number of pending chat requests that are currently assigned to the agent.
Time Elapsed Since Login	The amount of time the agent has been logged in to Live Agent.
Time Elapsed Since Last Accept	The amount of time since the agent last accepted a chat request.
Message to Supervisor (optional)	The private message that the agent sent with a help flag.

### EDITIONS

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Expand each agent's name to see details about the customers they're chatting with.

Customer Detail	Description
Visitor Name	The name of the customer, if available.
IP	The IP address of the customer's device.
Network	The customer's network, if available.
Browser	The type of internet browser the customer is using to connect to their chat window.
City	The city the customer is chatting from.
Country	The country the customer is chatting from.
Duration	The amount of time the customer has been engaged in a chat with the agent.
Action	The actions you can take to view the customer's chat with the agent.

SEE ALSO:

[Live Agent Statuses](#)

## Queue Status List

The queue status list in the supervisor panel gives you access to real-time information about your organization's chat buttons and queues.

Queue Detail	Description
Button Name	The name of the chat button.
ID	The unique Salesforce ID of the chat button.
Queue Length	The number of chats that are waiting to be assigned to an agent.
Longest Wait	The longest amount of time a customer chat has waited to be connected to an agent.

### EDITIONS

Available in: Salesforce Classic


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


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



## Monitor Your Agents' Chats

View your agents' chats from the supervisor panel as they help customers. You can monitor agents' performance and give them real-time feedback and help as they serve customers.

1. In the Agent Status list, click  to expand the information about the agent whose chat you want to view. If an agent has requested help, you see a red flag next to the name and a private message (far right) if the agent entered one.
2. To view a chat, click **View** in the Action column of the chat you want to monitor.  
The chat monitor opens in the Agent Status list.
3. To send a private message to an agent as the agent is chatting with a customer, type your message in the message field and press **Enter**.  
The agent can see your message in the chat log, but the message is invisible to the customer.

When you finish monitoring your agent's chat, click  again to collapse the chat monitor.

To remove a flag after you've provided help, click **Lower Flag**.

SEE ALSO:

[Agent Status List](#)

### EDITIONS

Available in: Salesforce Classic

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

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

### USER PERMISSIONS

To use the Live Agent supervisor panel in the Salesforce console:

- Access to the Live Agent supervisor tab in a user profile or permission set, and included in a Salesforce console app

To view agents' chats:

- "Agent Sneak Peek Enabled" in your Live Agent configuration

To send whisper messages to agents:

- "Whisper Messages Enabled" in your Live Agent configuration

## Assign Skills to Agents

Assign skills to your agents as the expertise of your team evolves.

1. In Setup, enter *Skills* in the **Quick Find** box, then select **Skills**.
2. Click the name of the skill you want to assign.
3. Click **Edit**.
4. Select either the profiles (recommended) or individual users who have this skill.
5. Click **Save**.

If you don't have access to the Skills page, ask your Salesforce administrator about enabling this permission. Only your administrator can create skills.

## Report on Live Agent Sessions

Gain insight into your agents' chat activities by building reports about Live Agent chat sessions.

You can create a custom report type for Live Agent chat sessions and use it to run reports on your agents' sessions using the Report Builder. These Live Agent session reports can provide insight about your agents' chat activities—for example, whether or not your agent team is able to handle all chat requests from your customers.

1. Create a custom report type using Live Agent Sessions as the primary object.
2. Create a new Live Agent report using the Report Builder.
3. Customize your report to include the columns of information you want to feature.
4. Save or run the report.

SEE ALSO:

[Live Agent Session Records](#)

### EDITIONS

Available in: Salesforce Classic

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

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

### USER PERMISSIONS

To assign skills:

- "Assign Live Agent Skills to Users"

### EDITIONS

Available in: Salesforce Classic

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

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

### USER PERMISSIONS

To create, edit, and delete reports:

- "Create and Customize Reports"
- AND
- "Report Builder"

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