

salesforce

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# Salesforce Console Implementation Guide

Salesforce, Spring '16



 @salesforcedocs

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# INTRODUCTION TO THE CONSOLE

## Salesforce Console

A Salesforce console is designed to boost productivity in fast-paced service and sales 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.

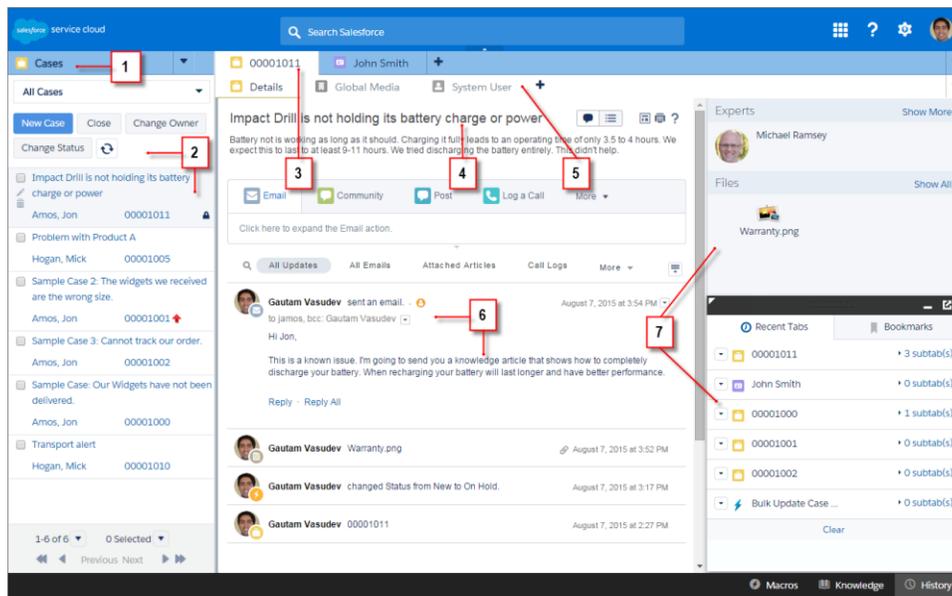
The console's tab-based interface makes it easy for you to see records and their related items on one screen, and work on multiple items simultaneously.

### EDITIONS

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

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

### 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.

## Who Should Read This Guide

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The Salesforce Console Implementation Guide is for administrators who want to plan and implement a one time, basic setup of a console. Administrators create consoles for sales or service teams who quickly access multiple records to help customers. Optionally, developers can customize, extend, and integrate a console with other systems using console components and an API known as the Salesforce Console Integration Toolkit. For more information on customizing a console with code, see [Console Components](#).

# PLAN AND REVIEW LIMITATIONS

## 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 Salesforce org 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.

### EDITIONS

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

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

## 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
Highlights Panel		✓	✓
Brand a Console		✓	✓
Pinned Lists	✓	✓	✓
Save User Sessions	✓	✓	✓
Bookmarks and Recent Tabs	✓	✓	✓
Keyboard Shortcuts	✓	✓	✓
Multi-Monitor Components	✓	✓	✓
Console Components		✓	✓
Whitelist Domains		✓	✓
Push Notifications		✓	✓
Interaction Logs		✓	✓
Softphone Integration		✓	✓
Knowledge Sidebar		✓	✓
Knowledge One Footer		✓	✓
Live Agent			✓

### EDITIONS

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

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

### USER PERMISSIONS

Configure a Salesforce Console for Service:

- "Customize Application"

Salesforce Console for Sales:

- "Customize Application"

AND

"Sales Console User"

## 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 org.

For best performance, we recommend that console users adopt the Google Chrome™ browser and machines with 8 GB of RAM. Note that 32-bit systems are subject to memory limitations. To take full advantage of the added RAM, use 64-bit versions of both the OS and the browser.

Even if the new user interface theme isn't enabled for your org, 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: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

## Salesforce Console Planning Questions

Before you set up a console, review these questions to help you get the most out of your implementation.

### Who will use a console in your Salesforce org?

A console is designed for users who want to find, update, and create records quickly. If users' profiles are assigned to a console app, they can access it. Before creating a console, we recommend determining which of your existing user profiles will benefit the most from console access, such as profiles assigned to support agents or a telesales team. You can also consider creating a profile or cloning an existing profile from which you can assign users to a console. See [Set up a Salesforce Console App](#) on page 13.

### Have you purchased enough feature licenses?

Salesforce users must have a feature license to use a console. After you set up a console, you can manually assign the licenses to users. See [Assign the Service Cloud Feature License to Users](#) on page 19.

### Who will implement console apps for your company?

A console is an app, consisting of a group of tabs working as a unit to provide application functionality. Salesforce provides standard apps, such as Sales and Call Center. You create a console as a custom app that users select from the Force.com app menu. If there is a user in your company who is familiar with creating apps in Salesforce, have that person implement console apps. See [Set up a Salesforce Console App](#) on page 13.

### Which items do you want users to access from the console's navigation tab?

The navigation tab appears when users select a console from the Force.com app menu. This tab lets users select an object, such as a case, account, or contact, and view that object's home page. We recommend that you add any objects to the navigation tab that function as the center of your business process. For example, the center of support agents' business process is most likely cases, so make cases available to agents from the navigation tab. See [Set up a Salesforce Console App](#) on page 13.

### How do you want records to display in a console when they're selected from outside of primary tabs or subtabs?

A console displays all records as tabs so that users can quickly find, update, and create records on one screen. Primary tabs display the main item to work on, such as an account. Subtabs display related records, such as cases or contacts on an account. You can

choose how records display when they're selected outside of primary tabs or subtabs, for example, when users select cases from list views or search results. See [Set up a Salesforce Console App](#) on page 13.

**Which fields do you want to highlight on records?**

A console includes a highlights panel that showcases the most important fields on each record. The highlights panel helps users see critical information without having to click a button or scroll down a page. We recommend working with your users to determine the most important fields on records, such as cases, accounts, and contacts, so that you can set up a console to highlight the most useful information. See [Configure Highlights Panels for a Salesforce Console](#) on page 11.

**Do you want users to add notes to records using interaction logs?**

An interaction log lets Salesforce console users write notes on records that appear on primary tabs. You can create multiple interaction logs and customize them to display specific task fields for different users to update. Determine if it's necessary for your users to add notes to records or updated task fields on records directly. For example, some users might use a console to quickly find and review records versus adding or updating record information. If the former suits your business needs, don't set up interaction logs. Also, if it's not critical that your users add notes to records, you can save screen space by not setting up interaction logs. See [Set Up Interaction Logs for a Salesforce Console](#) on page 18.

**Do you want to assign interaction logs to specific user profiles or all users?**

Since not all console users add notes to records using an interaction log, you can assign interaction logs to specific user profiles. See [Assign Interaction Logs](#) on page 19.

**How do you want lists to display in a console?**

List views let users see a specific set of records, such as closed cases or new accounts. You can choose how list views appear in each console, such as to the left of the screen, at the top of the screen, or full screen. We recommend asking your users how they prefer to view lists and if there's a particular format for displaying lists that's most productive for them. See [Choose How Lists Display in a Salesforce Console](#) on page 14.

**Do you want console users to access domains outside of Salesforce?**

Determine if there are any domains that you want users to access from within a console. For example, you might find it useful to let users access `www.google.com` or your business processes might require users to access a third-party system to complete tasks. See [Whitelist Domains for a Salesforce Console](#) on page 15.

**Do you want console users to automatically see visual indicators when lists or records they're working on have changed?**

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. Before you create push notifications, we recommend determining which objects and fields change frequently, and then adding those items to push notifications to help users. See [Configure Push Notifications for a Salesforce Console](#) on page 16.

**Do you want to add any keyboard shortcuts to a console?**

Keyboard shortcuts let users perform actions by pressing a combination of 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 using a mouse to click **Save**, you can create a keyboard shortcut so that users can type case details and press CTRL+S. Before you create any shortcuts, we recommend determining if there are any frequent user actions, or combination of actions, that you can streamline with key commands. See [Customize Keyboard Shortcuts for a Salesforce Console](#) on page 17.

**Do you want users to receive and make phone calls from a console?**

You can integrate Salesforce with third-party computer-telephony integration systems (CTI), or you can have developers create call control tools for Salesforce with the Open CTI. Both call center approaches work with the console and provide users with a SoftPhone from which they can receive and make phone calls. 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. See "Setting Up Salesforce CRM Call Center" and "Salesforce Open CTI Overview" in the online help.

### Do you want to save user sessions automatically so that each time users log in they can continue to work from where they left off?

User sessions are automatically saved so that when users close their browsers or log out of Salesforce they can continue working from any open tabs, console components, or screen-sizing customizations; but you can turn off this feature. See [Save User Sessions for a Salesforce Console](#) on page 21.

### Do you want to add a component to the footer of a console that lets users quickly access the last ten tabs they viewed or edited?

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. See [Turn On the History Component for a Salesforce Console](#) on page 22.

### Do you want relevant knowledge base articles to automatically appear alongside cases in the 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. See [Turn On Knowledge for a Salesforce Console](#) on page 18 and “Build Your Knowledge Base” in the online help.

### Do you want console users to connect with customers or website visitors in real time through text-only live chats?

If Live Agent is set up, you can add it to a console so that users can chat with your customers while viewing customer data. See [Add Live Agent to the Salesforce Console](#) and “Setting Up Live Agent” in the online help.

### Do you want to customize, extend, or integrate a console with other systems?

Create components to customize, extend, or integrate the Salesforce console with other systems. For example, you might want to create components that display third-party apps or content when users view specific pages. See [Console Components](#) on page 24 and “Visualforce” in the online help.

## Salesforce Console Limitations

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

### Display Limitations

A Salesforce console is available only in Supported Browsers for Salesforce Classic. If you use an unsupported browser, you'll get a degraded experience.

 **Tip:** For best performance, we recommend that console users adopt the Google Chrome™ browser and machines with 8 GB of RAM. Note that 32-bit systems are subject to memory limitations. To take full advantage of the added RAM, use 64-bit versions of both the OS and the browser.

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.

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**.

### EDITIONS

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

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

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.

You can't use pinning in search results if Chatter is disabled.

### 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 Salesforce org'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.

# SET UP A CONSOLE FOR SERVICE OR SALES

## 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 Salesforce admins and developers can create console components, or use code with an API named the Salesforce Console Integration Toolkit.

### EDITIONS

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

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

### USER PERMISSIONS

To set up a Salesforce console for Service:

- "Customize Application"
- AND
- "Service Cloud User"

## 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 Salesforce org, 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 Salesforce admins and developers can create console components, or use code with an API named the Salesforce Console Integration Toolkit.

### EDITIONS

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

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

### USER PERMISSIONS

To assign permission set licenses:

- "Manage Internal Users"

To create a Salesforce Console for Sales:

- "Customize Application"

AND

"Sales Console"

## 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 panels 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.

### EDITIONS

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

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

### USER PERMISSIONS

To customize page layouts:

- "Customize Application"

AND

"Service Cloud User" OR  
"Sales Console"

To view page layouts:

- "View Setup"

## Turn On Salesforce Console Highlights Panels

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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**.

### EDITIONS

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

### USER PERMISSIONS

To customize page layouts:

- "Customize Application"

AND

"Service Cloud User" OR  
"Sales Console"

To view page layouts:

- "View Setup"

# Set up 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 Salesforce org’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 org. 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 org 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: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## USER PERMISSIONS

To view apps:

- “View Setup and Configuration”

To manage apps:

- “Customize Application”
- AND
- “Service Cloud User” OR “Sales Console”

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

## 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.

## 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.

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

### USER PERMISSIONS

To define colors in the Salesforce console:

- "Customize Application"

### EDITIONS

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

### USER PERMISSIONS

To choose how lists display:

- "Customize Application"

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**.

## Whitelist Domains for a Salesforce Console

---

Salesforce admins 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**.

### EDITIONS

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

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

### 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 apply to all your console apps.
6. Select the objects that you want to 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**.

### EDITIONS

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

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

### USER PERMISSIONS

To configure push notifications:

- "Customize Application"

- Grant push notification users at least the “Read” permission on the Push Topics standard object. See “User Permissions and Access” in the Salesforce Help.

 **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.

Push notifications aren’t available in the console in Professional Edition.

## 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.

- From Setup, enter `Apps` in the `Quick Find` box, then select **Apps**.
- Click **Edit** next to a Salesforce console app.
- Click **Customize keyboard shortcuts**.
- Click **Edit** on the top of the page.
- 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.
- 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.

### EDITIONS

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

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

### USER PERMISSIONS

To customize keyboard shortcuts for a Salesforce console:

- “Customize Application”

## 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 Salesforce org 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.

### EDITIONS

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

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

### USER PERMISSIONS

To turn on the Knowledge sidebar:

- "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.

### EDITIONS

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

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

### USER PERMISSIONS

To set up interaction logs:

- "Customize Application"

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

## 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.

### EDITIONS

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

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

### USER PERMISSIONS

To assign interaction logs:

- "Customize Application"

## Assign the Service Cloud Feature License to Users

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`.
4. 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: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To assign the Service Cloud User feature license to users:

- "Manage Internal Users"

## 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**.

### EDITIONS

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

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

### USER PERMISSIONS

To create permission sets:

- "Manage Users"

# LEARN ABOUT MORE CONSOLE FEATURES

## 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.

### EDITIONS

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

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

### USER PERMISSIONS

To turn on multi-monitor components:

- "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.

### EDITIONS

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

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

### 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**.

### EDITIONS

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

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

### USER PERMISSIONS

To turn on the History component:

- "Customize Application"

## 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.

### EDITIONS

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

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

### USER PERMISSIONS

To view and use the SoftPhone:

- Member of a call center

## 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 Salesforce org has Knowledge enabled, select `Include Suggested Articles from Knowledge in Live Agent` to display the Knowledge One widget in the chat workspace.
6. Click **Save**.

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

### EDITIONS

Available in: Salesforce Classic

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

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

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

### USER PERMISSIONS

To add Live Agent to the Salesforce console:

- "Customize Application"

# SUPER CHARGE YOUR CONSOLE

## 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](#).

### EDITIONS

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

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

## 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

### EDITIONS

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

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

- 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.

## 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 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:

### EDITIONS

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

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

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

## 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 Salesforce org, add the Knowledge One component to case pages so agents can easily find and work with articles.
  - If your org 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 org 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 org, 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: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To add custom console components:

- "Customize Application"
- AND
- "Service Cloud User" OR "Sales Console"

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**.

## 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](#).

### EDITIONS

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

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

### USER PERMISSIONS

To add custom console components:

- "Customize Application"
- AND
- "Service Cloud User" OR "Sales Console"

To create Visualforce pages:

- "Customize Application"

To manage canvas apps:

- "Customize Application"

## More Resources

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To take your console implementation to the next level, check out these design guidelines and best practices.

- [Service Console Design Guide](#)
- [Salesforce Console Best Practices: Creating a Desktop Your Agents Love](#)

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