



Streamline Sales and Service with the Salesforce Console

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STREAMLINE SALES AND SERVICE WITH THE SALESFORCE 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.

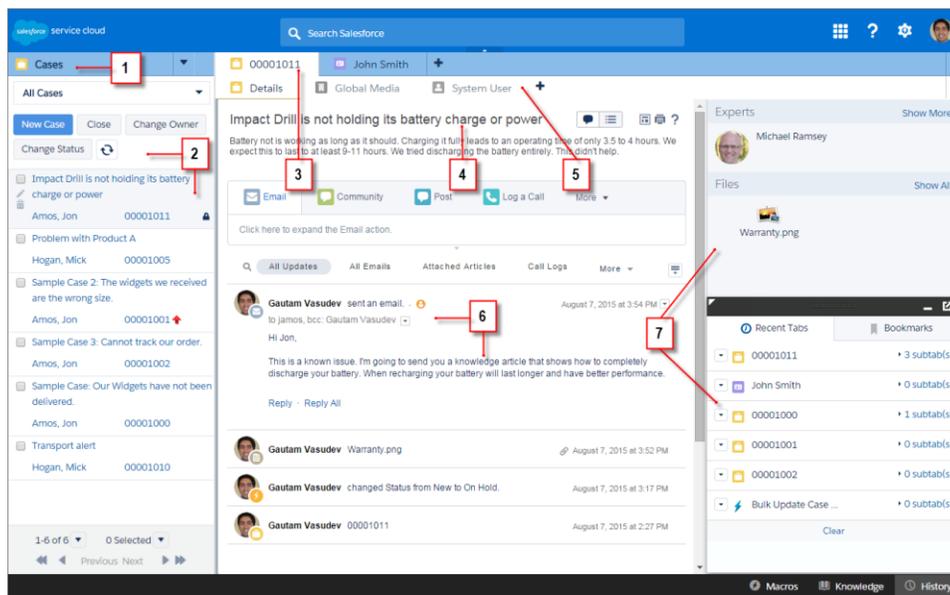
The console's tab-based interface makes it easy for you to see records and their related items on one screen, and work on multiple items simultaneously.

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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.

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 available only in Supported Browsers for Salesforce Classic. If you use an unsupported browser, you 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. Keep in mind 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**. In addition, if you override a detail page with a Visualforce page that uses related lists, any new records created using that related list aren't displayed until the page is reopened in a new tab.
- If you edit a page layout in the console, such as adding a primary tab component like an interaction log, the updated layout isn't displayed until the page is closed and then reopened in a new primary tab.
- 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.

EDITIONS

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- 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.
- If Chatter is disabled, you can't use pinning in search results.

Customization Limitations

To edit a console app, you must be in Salesforce Classic. From Setup, enter `Apps` in the `Quick Find` box, then select **Apps** and click **Edit** next to your console app.

- The console doesn't support Chatter Messenger or the App Launcher.
- Some Visualforce pages don'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.
- The console doesn't support Visualforce pages that use the **Require CSRF protection on GET requests** preference. If you use Visualforce pages with CSRF protection, your agents can receive errors when trying to access the page.
- 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

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.

EDITIONS

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

 **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 Planning Questions](#)
[Set Up a Salesforce Console for Service](#)
[Set Up a Salesforce Console for Sales](#)
[Salesforce Console Implementation Guide](#)

Salesforce Console Implementation Tips

Before you implement a console, review these tips.

General Implementation Tips

A console respects all 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. Keep in mind 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.

To further improve performance, enable Tab Limits (under **Setup > Create > Apps > [name of console] > Edit**).

Even if the Salesforce Classic 2010 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, 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.

SEE ALSO:

[Prepare to Set Up a Salesforce Console](#)
[Salesforce Console Implementation Guide](#)

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 10.

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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 8.

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 10.

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 10.

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 10.

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 13.

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 15.

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 16.

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 16.

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 21.

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 21.

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 20.

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 "Set Up a Call Center" and "Salesforce Open CTI" 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 17.

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 18.

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 23 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 42 and "Visualforce" in the online help.

SEE ALSO:

[Salesforce Console Implementation Tips](#)

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

[Salesforce Console Implementation Guide](#)

Set up Service Cloud Features with Launch Pad Templates

Deploy and test Service Cloud features with just a few clicks. This suite of templates helps you set up some of the most popular Service Cloud features, such as time-saving console configurations and reports and dashboards essential for service organization.

To use templates, from the Setup **Quick Search** box, enter **Launch Pad**.



Tip: It's best to try Launch Pad in your sandbox environment, so that you can test out new features without affecting your live production environment.

Launch Pad templates aren't supported for IE version 9 or earlier.

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

Set Up a Salesforce Console for Service

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

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).



Note: Set up your Live Agent implementation before adding it to your console. If you're adding Live Agent to an existing console, test your console before deploying it to your agents. Make sure your sidebar components look as expected.

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

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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"

SEE ALSO:

- [Salesforce Console Implementation Tips](#)
- [Prepare to Set Up a Salesforce Console](#)
- [Salesforce Console Configurable Features](#)
- [Salesforce Console Implementation Guide](#)

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**.

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 Salesforce org, contact Salesforce.
2. [Customize highlight panels for all objects](#) and [turn them on](#).
3. By default, your org has the "Sales Console User" permission set license, but you need to assign this permission set license to users. The steps are the same as assigning any permission set license.
4. [Create a Sales Console permission set and assign it to users](#).
5. 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](#).
6. [Create a console app and assign it to user profiles](#).

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

USER PERMISSIONS

To assign the Service Cloud User feature license to users:

- "Manage Internal Users"

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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"

 **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.

SEE ALSO:

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

[Salesforce Console Implementation Guide](#)

Create a Sales Console User Permission Set and Assign It to Users

After you've assigned the "Sales Console User" permission set license to users, you need to create the Sales Console permission set that users need to access the sales console.

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 type is selected, you won't be able to add the *Sales Console* user permission to this permission set.
3. On the Permission Set page, click **App Permissions**.
4. Select the *Sales Console* permission and click **Save**.
5. Assign this permission set to users. Do this from the Permission Set License Assignment section of the user's detail page.

SEE ALSO:

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

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

USER PERMISSIONS

To create permission sets:

- "Manage Users"

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**.

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Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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.

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.

 **Note:** To edit a console app, you must be in Salesforce Classic. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps** and click **Edit** next to your console app.

| 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 | | ✓ | ✓ |
| Responsive Lists | | ✓ | ✓ |
| Interaction Logs | | ✓ | ✓ |
| Softphone Integration | | ✓ | ✓ |
| Knowledge Sidebar | | ✓ | ✓ |
| Knowledge One Footer | | ✓ | ✓ |

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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"

[Live Agent](#)

SEE ALSO:

[Salesforce Console](#)

Highlights Panel

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 (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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USER PERMISSIONS

To customize page layouts:

- "Customize Application"

AND

"Service Cloud User" OR
"Sales Console"

To view page layouts:

- "View Setup and Configuration"

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.

SEE ALSO:

[Turn On Salesforce Console Highlights Panels](#)

[Highlights Panel Fields and Format](#)

EDITIONS

Available in: **Salesforce Classic** (in Setup and the app menu) and in **Lightning Experience** (only in the App Launcher)

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 and Configuration"

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](#)

Interaction Logs

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

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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 and Configuration"

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

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

Available in: **Salesforce Classic** (in Setup and the app menu) and in **Lightning Experience** (only in the App Launcher)

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

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](#)

Console Preferences

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.

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

USER PERMISSIONS

To assign interaction logs:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

USER PERMISSIONS

To choose how lists display:

- "Customize Application"

5. Click **Save**.

SEE ALSO:

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

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

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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**.

SEE ALSO:

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

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

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

USER PERMISSIONS

To turn on the History component:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

USER PERMISSIONS

To turn on multi-monitor components:

- "Customize Application"

Optimize Salesforce Console List Views with Responsive Lists

Responsive lists resize dynamically and give your list views a modern look and feel. And optional row hovers let you preview a record without opening it.

Here's how to enable responsive lists:

1. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
2. Find the name of the console you want to modify, then click **Edit**.
3. Select **Enable Responsive Lists**.
4. Click **Save**.

The fields that appear in the hover overlay mirror the fields in the active list view. To customize which fields appear, edit the list view or create a custom list view. Keep in mind that the list view must be expanded wide enough for the Edit, Delete, and Create New View links to be visible.

Some more detail about list hovers:

- For cases, hovers appear when you mouse over the *Subject* field. For all other records, hovers appear when you over the *Name* field.
- If the *Subject* or *Name* field isn't in the list view, the hover doesn't appear.
- You always see the *Description* field on case hovers, even though it can't be added to the list view.
- Responsive lists aren't supported for IE version 10 or earlier.

Tip: If you want to keep the updated look and feel of responsive lists, but turn off the hover feature, edit your console and deselect **Enable List View Hovers**.

| ACTION | CASE NUMBER ↑ | CONTACT NAME | SUBJECT | STATUS | PRIORITY |
|---|---------------|----------------|---|-----------|----------|
|    | 00001000 | Amos, Jon | Sample Case: Our Widgets have not been delivered. | Escalated | High |
|    | 00001001 | Stamos, Edward | | | |
|    | 00001002 | Stamos, Edward | | | |

Sample Case: Our Widgets have not been delivered.  

Case Number: 00001000 Contact Name: Amos, Jon Status: Escalated

Priority: High Date/Time Opened: 7/11/2016 3:06 PM Case Owner Alias: AUser

Description: The widget the customer requested weren't delivered on time.

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

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

Available in: **Salesforce Classic** (in Setup and the app menu) and in **Lightning Experience** (only in the App Launcher)

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

USER PERMISSIONS

To customize keyboard shortcuts for a Salesforce console:

- "Customize Application"

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. Don't include `http://` or `https://` because those prefixes are part of a URL, not a domain.

If your CTI phone is running on a server with a non-standard port, make sure to include the port number in your domain. For example, if your server is called `myserver` and your port number is `8500`, include `myserver:8500` in your whitelist.

5. Click **Save**.

SEE ALSO:

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

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. |

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

USER PERMISSIONS

To whitelist domains for a Salesforce console:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

USER PERMISSIONS

To configure push notifications:

- "Customize Application"

| Option | Description |
|-------------------|--|
| 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. |

- Click **Select objects and fields for notifications**, and select **Edit**. The push notification settings you choose here apply to all your console apps.
- 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.
- Under Fields, click **Edit** and choose the fields you want to trigger push notifications.
- Click **OK**, then select **Save**.
- Grant push notification users at least the "Read" permission on the Push Topics standard object. See User Permissions and Access.

 **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.
- If you set up push notifications for the lead object and use Data.com Clean rules, push notifications are triggered in the console. Keep in mind that extra notifications can affect your push notification limit.

SEE ALSO:

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

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

SEE ALSO:

[Salesforce Console](#)

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**.

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"

EDITIONS

Available in: **Salesforce Classic** (in Setup and the app menu) and in **Lightning Experience** (only in the App Launcher)

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

USER PERMISSIONS

To turn on the Knowledge sidebar:

- "Customize Application"

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

SEE ALSO:

[Salesforce Console Configurable Features](#)

[Salesforce Console](#)

Using Macros in Service Console

Macros

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. A macro is a set of instructions, which tell the system how to complete a task. When an agent runs a macro, the system performs each instruction. 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 supported on feed-based standard and custom objects.

EDITIONS

Available in: Salesforce Classic

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

IN THIS SECTION:

[Get Started with Macros](#)

Before you can create and run macros, ensure that your org meets the prerequisites for using macros and add the macros widget to the Service Console

[Search All Text Fields in Macros](#)

Expand the scope of macros search, so agents can quickly find macros by searching for keywords contained in a macro's text fields.

[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.

Get Started with Macros

Before you can create and run macros, ensure that your org meets the prerequisites for using macros and add the macros widget to the Service Console.

Macros are supported only on the Accounts, Cases, Contacts, and Leads objects. Macros are available only on the Service Console.

To use macros, your org must satisfy these prerequisites:

- Feed tracking must be enabled on the object that you want to run macros on.
 - Use a feed-based page layout on the object that you want to run macros on.
 - The publisher actions that you want to use in macros must be available on the page layout. For example, if you want to use macros to insert templates or quick text into Case Feed emails, then the Email Publisher must be added to the case page layout.
 - If you want to use quick actions in macros, the quick actions must be available on the page layout.
 - The macros widget must be added to the console.
 - Users must have the appropriate user permissions to [create macros](#) and [run macros](#).
1. Add the macros browser to the Salesforce Console for Service by [assigning it as a console component](#) on page 49 to the app.
 - a. From Setup, enter `Apps` in the `Quick Find` box, then select **Apps**.
 - b. Select the console app that you want to add the macros browser to.
 - c. Click **Edit**.
 - d. In `Choose Custom Console Components`, use the **Add** arrow to move the macros browser from the Available Items list to the Selected Items List.
In `Align Console Components`, choose whether to align the macros browser to the left or right of the console's footer.
 - e. Click **Save**.
 2. Give your users the appropriate user permissions to [create macros](#) or [run macros](#).
 - a. From Setup, enter `Users` in the `Quick Find` box, then select **Profiles**.
 - b. Select the profile you want to work with.
 - c. Click **Edit**.
 - d. In the Standard Object Permissions section, ensure that users have the appropriate permissions on the Macros object.
 - e. To allow users to run [irreversible macros](#) on page 29, such as macros that send emails or update field values, then scroll to the Administrative Permissions section and select "Manage Macros Users Can't Undo."
 - f. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

SEE ALSO:

[Tips for Creating Macros](#)

[Create Macros](#)

[Irreversible Macros](#)

Search All Text Fields in Macros

Expand the scope of macros search, so agents can quickly find macros by searching for keywords contained in a macro's text fields.

For example, suppose that an agent wants to find a macro where the description is "Return Policy - 30 days." The agent could search for "return policy" and see all macros that contain that phrase.

If this setting is enabled, agents can search for macros across all text fields in the macro instructions. If this setting isn't enabled, agents can search for keywords only in the macro's title and description fields.

To let agents to search all text fields:

1. From Setup, enter *Macros* in the Quick Find box, then select **Macro Settings**
2. Click **Edit**.
3. Select **Include all Macro text fields in search**.
4. Click **Save**.

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.
4. 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.

EDITIONS

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

USER PERMISSIONS

To create, edit, and delete page layouts:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic

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

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

5. 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.
6. 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: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

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

1. Create a macro.
 - a. In the Salesforce for Service Console, click the **Macros** widget.
 - b. Click **+ Create Macros**.
 - c. 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"*.
 - d. 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.
2. Add the instructions for the macro.
 - a. 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.
 - b. Click **Done**. After every instruction, click **Done** to move to the next line.
 - c. 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.
 - d. 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.
 - e. 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: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

 **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: |
|-------------------|---|
| M | Open the Macros widget. |
| S | Put your cursor in the search bar. |
| E | Edit the selected macro. |
| V | View the Macro Details page. |
| Enter | Run the selected macro. |
| Space bar | Expand or collapse the selected macro's instructions. |
| Up Arrow | Scroll up the macros list. |
| Down Arrow | 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

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

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EDITIONS

Available in: Salesforce Classic

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

- 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: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

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 re-create this example in your Salesforce org, 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: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

EDITIONS

Available in: Salesforce Classic

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

 **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.

To run bulk macros, the `Enable Enhanced Lists` setting must be enabled in your org.

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

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 Salesforce org.

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

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

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.

EDITIONS

Available in: Salesforce Classic

Macros available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Enterprise** and **Unlimited** Editions.

USER PERMISSIONS

To view macros:

- "Read" on Macros

To create and edit macros:

- "Create" and "Edit" on Macros

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.

[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.

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.

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

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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.
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**.

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.

[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.

EDITIONS

Available in: Salesforce Classic

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

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 Salesforce org 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 |
| 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 |

EDITIONS

Available in: Salesforce Classic

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

| Action | Description | Supported in Bulk Macros? |
|----------------------|--|---------------------------|
| 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: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

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"> 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>. 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. | No |
| Run Search | Tells the macro to search the knowledge base using the criteria specified in the Set Keywords instruction. | No |

| Action | Description | Supported in Bulk Macros? |
|------------------------------|--|---------------------------|
| 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 Salesforce org 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> <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 |

EDITIONS

Available in: Salesforce Classic

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

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 Salesforce org 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.

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 |

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Salesforce Classic

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

| Action | Description | Supported in Bulk Macros? |
|------------------|--|---------------------------|
| 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"> • Post • Comment • Private <p>Twitter message types:</p> <ul style="list-style-type: none"> • Tweet • Retweet • Reply • Direct | 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 |

Customize a Salesforce 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

EDITIONS

Available in: **Salesforce Classic** (in Setup and the app menu) and in **Lightning Experience** (only in the App Launcher)

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

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](#)

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

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

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 you edit a page layout in the console, such as adding a primary tab component like an interaction log, the updated layout isn't displayed until the page is closed and then reopened in a new primary tab.
- 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

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

| 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, 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 available through a pilot program. For information on enabling Case Experts for your org, contact Salesforce.

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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. Under **Component**, set the details:

- For Visualforce pages or canvas apps, click  under **Component** to find and select your component.

 **Tip:** You can include Lightning components in Visualforce pages. See [Lightning FAQ](#).

- 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 look up 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, do so from page layouts. Related list components don't display custom buttons.

8. Under **Label**, type the name for your component to 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, and canvas apps.

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.

EDITIONS

Available in: **Salesforce Classic** (in Setup and the app menu) and in **Lightning Experience** (only in the App Launcher)

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

USER PERMISSIONS

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

- "Customize Application"

- **Update Action:** Select the “Update” quick action. This quick action lets support agents update a record.
6. Add more quick action components as needed.
 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. |

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

SEE ALSO:

[Add Console Components to Page Layouts](#)

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 have access to 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 to display on the button users click to launch your component. For example, *Live Agent*.
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.
6. Type the width of the button to 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.
 -  **Tip:** You can include Lightning components in Visualforce pages. See [Lightning FAQ](#).
8. Type the height and width of the window used to display your component in the console.
9. To prevent users from changing the dimensions of the window used to display your component, click **Fixed Width** or **Fixed Height**.
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

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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"

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](#)

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 for a Classic app 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

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

USER PERMISSIONS

To assign custom console components to an app:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

USER PERMISSIONS

To define colors in the Salesforce console:

- "Customize Application"

Use a Salesforce Console

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 Salesforce admin adds [custom console components](#), additional functionality might be available for you in the sidebars and footers of a console.

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

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

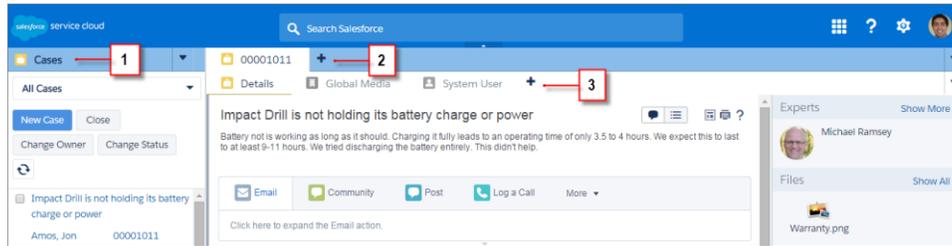
Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

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

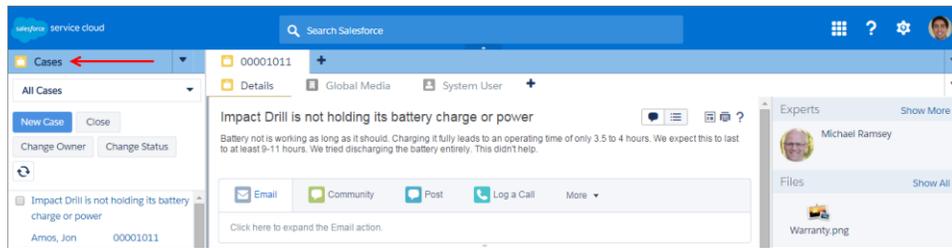
Use the navigation tab to select an object and view its home page.

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

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 Salesforce org.

SEE ALSO:

[Salesforce Console Tabs](#)

[Use a Salesforce Console](#)

Guidelines for Working with Salesforce Console Tabs

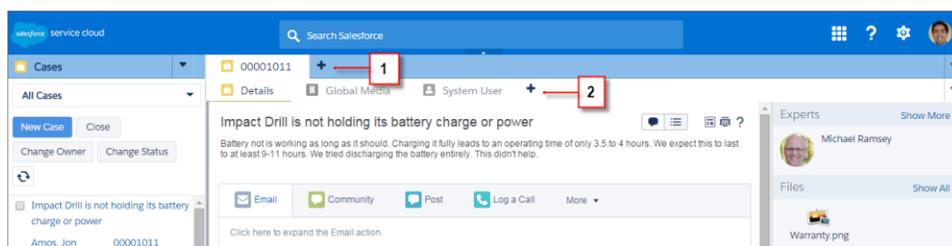
Learn how you can get the most out of working with a console's primary tabs and subtabs.

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

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 Salesforce org'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 54.

 **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 Salesforce admin 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 Salesforce admin, 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

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

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

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

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.

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

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](#)

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 |

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

| Action (Keyboard Shortcut) | Description | Key Command |
|--------------------------------|--|-------------------|
| 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 |
| 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 a Salesforce admin 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

Available in: **Salesforce Classic** (in Setup and the app menu) and in **Lightning Experience** (only in the App Launcher)

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

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](#)

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 a Salesforce admin 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

Available in: **Salesforce Classic** (in Setup and the app menu) and in **Lightning Experience** (only in the App Launcher)

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

USER PERMISSIONS

To view the interaction log:

- "Read" on tasks

To save notes in the interaction log:

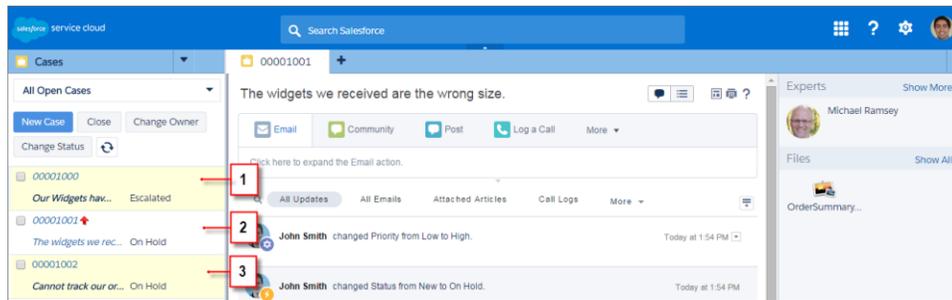
- "Edit" on tasks

EDITIONS

Available in: **Salesforce Classic** (in Setup and the app menu) and in **Lightning Experience** (only in the App Launcher)

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

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 admin changes.

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.
- If you set up push notifications for the lead object and use Data.com Clean rules, push notifications are triggered in the console. Keep in mind that extra notifications can affect your push notification limit.

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.

EDITIONS

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

USER PERMISSIONS

To view and use the SoftPhone:

- Member of a call center

 **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](#)

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

Available in: Salesforce Classic (in Setup and the app menu) and in Lightning Experience (only in the App Launcher)

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

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.

SEE ALSO:

[Live Agent for Support Supervisors](#)

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 chat with visitors in Live Agent in the Salesforce console:

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

Assist Customers with Chat

Use Live Agent to quickly help your customers solve issues.

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:

[Change Your Live Agent Status](#)

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

[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.

[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 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 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

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

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

USER PERMISSIONS

To 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 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

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 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 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 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 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 Salesforce admin.

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.

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 access Quick Text while chatting with visitors in Live Agent:

- "Read" on Quick Text

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. The file can't exceed 25 MB.
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 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 use the Salesforce console:

- "Live Agent" is enabled and set up

AND

Live Agent is set up in a Salesforce console app

Add Attachments to a Chat

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 Salesforce org uses Knowledge and your Salesforce admin 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 send articles to visitors only if your admin 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 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 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 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 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

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 Salesforce org 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 admin to enable it. Only a Salesforce admin can unblock an IP address.

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 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**.

Collaborate and Request Help

Transfer Chats to an Agent, Skill, or Button

Live Agent chats can be transferred to another agent, skill, or button so your customers always receive the highest-quality help from the most relevant sources.

Just as you forward an email or pass a case to another agent, you can transfer a Live Agent chat. Transferring is useful when a customer has an issue that another agent can solve, or requires an agent with a particular skill. How the chat gets to the next agent depends on the kind of transfer you use.

There are three types of transfers: Transfer to Agent, Transfer to Skill, and Transfer to Button. To ensure that your customers get help as quickly as possible, certain chat transfer types can exceed agents' configured capacity. You can set agent capacity through the Live Agent Configuration, or the Presence Configuration if your organization uses Omni-Channel.

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 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 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

| Type of Transfer | Scenario | Method of Transfer | Can Exceed Configured Agent Capacity? |
|--------------------|--|---|---------------------------------------|
| Transfer to Agent | You want to transfer the chat to Agent Jane, because she's the perfect fit for the case. | A chat request is sent to Agent Jane. If she accepts the request, the chat is transferred to her, and your chat workspace closes. | Yes |
| Transfer to Skill | You want to forward the chat to an agent who has the skill "billing specialist." | A chat request is sent to all agents assigned to the skill, and the chat is transferred to the first agent to accept it. | Yes |
| Transfer to Button | You want to transfer a chat from the sales queue to the service queue. | The chat is transferred to an available agent assigned to the selected button or queue. | No |

When chats are transferred directly to an agent or skill group, the transferred chats are allowed to exceed the accepting agent's capacity. This means that agents always receive a chat request, even if they're handling the maximum allowed number of chats. If the transfer request is rejected or times out, the original agent can try another recipient or transfer method.

Chats routed from buttons or queues always respect the configured agent capacity. So, agents assigned to that button or queue don't receive the transfer request—or any other chat requests—until they have open capacity. But don't worry: customers still won't get stuck waiting for another agent. When a chat is sent to the next queue, it's added into the list of incoming chats by its age, so it will appear higher up than brand-new chat requests.

When an agent accepts a transferred chat, the records attached to the chat transcript, like a case or contact, open alongside the chat in the workspace. The accepting agent has the information to start assisting the customer right away, without having to search for related records. These records are also completely up-to-date, as the previous agent is prompted to save any changes when the transfer is initiated.

 **Note:** If the accepting agent doesn't have permissions to view one or more of the attached objects, those items won't open in the transferred workspace.

IN THIS SECTION:

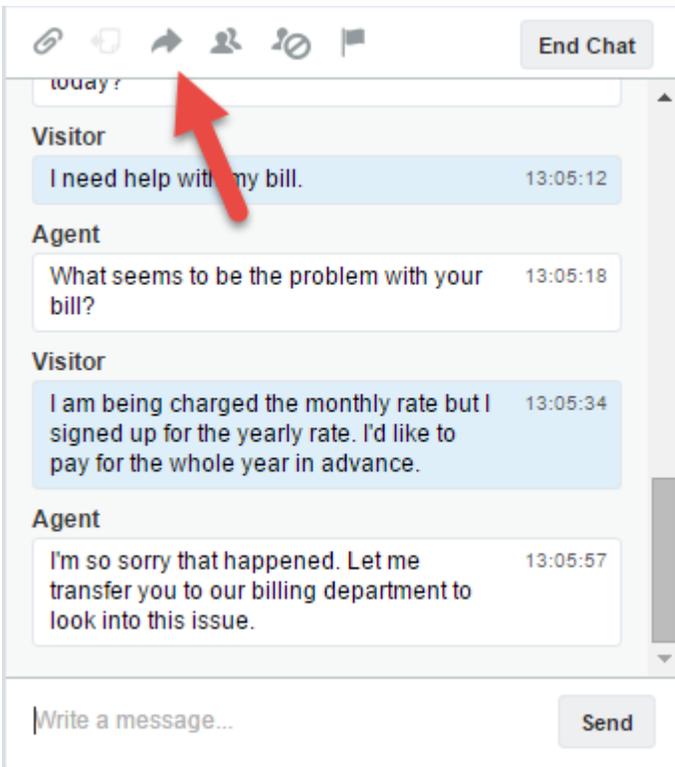
[Transfer Chats](#)

You can transfer chat sessions to other agents when a customer needs extra help with an issue, or to make room for new requests.

Transfer Chats

You can transfer chat sessions to other agents when a customer needs extra help with an issue, or to make room for new requests.

1. While chatting with a customer, click **Transfer**.



2. Select a transfer option from one of the menus.

EDITIONS

Available in: Salesforce Classic

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

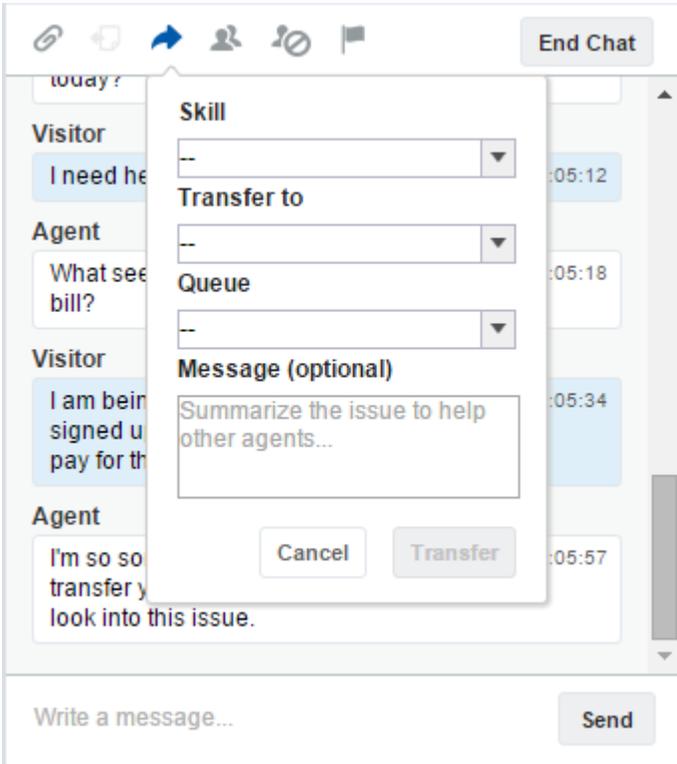
Live Agent is available in: **Unlimited** Edition with the Service Cloud

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

USER PERMISSIONS

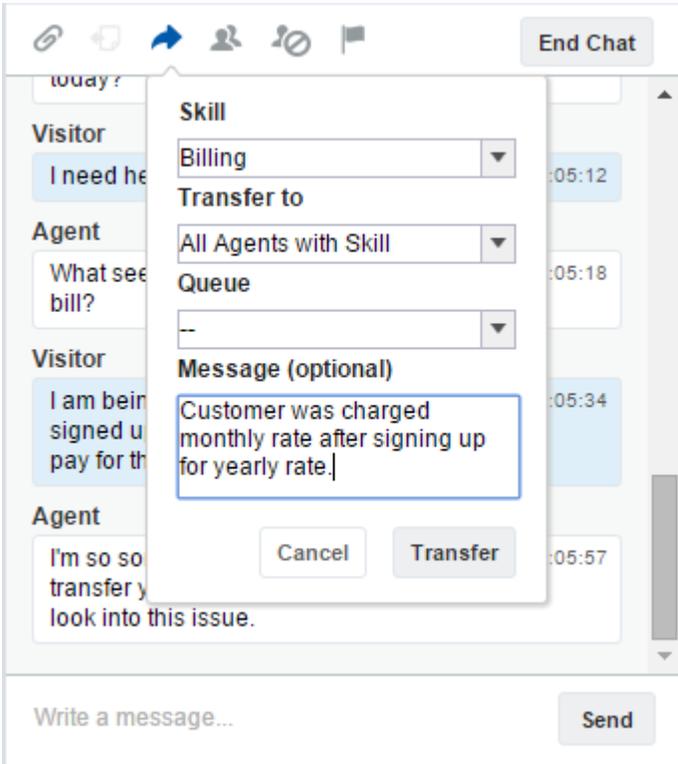
To chat with visitors in Live Agent in the Salesforce console:

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



 **Note:** There are options for each type of transfer that's enabled for your Salesforce org. If you don't see the option you need, ask your administrator to add it for you.

3. (Optional) Write a message for the agent receiving the chat. This message is part of the chat request to provide context for the next agent.



4. If the transfer is accepted, your chat and any associated records automatically close (don't worry, you'll be prompted to save your changes if you haven't already). If it's rejected, you can try again with another recipient or transfer method.

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](#).

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 admin to enable it.

EDITIONS

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

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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"

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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 in to 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.

Live Agent Session Records

Every time your agents log in to 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.

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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

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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.

IN THIS SECTION:

[Live Agent Transcript Fields](#)

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

[Live Agent Transcript Events](#)

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

EDITIONS

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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 Live Chat Visitor for more information. |
| 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) |
| Deployment | The deployment from which the visitor initiated the chat |

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| Field | Definition |
|----------------------|--|
| 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 |
| 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). |
| Network | The visitor's network or Internet Service Provider. |
| 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 support organization's website, the referring site is Google.</p> |
| Request Time | The time that the visitor initially requested the chat |
| Screen Resolution | The screen resolution used by the visitor |
| Start Time | The time that the agent answered the chat request |

| Field | Definition |
|-------------------------------|--|
| Status | Completed or Missed. A missed chat was requested but not answered |
| Supervisor Transcript Body | Contains the whisper messages from supervisors |
| 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 Agent 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 |
| Transfer Request Canceled | Chat transfer request was canceled by the agent who sent the request |

EDITIONS

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| Event | Description |
|-----------------------------------|--|
| 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 Cancel Chat |
| Agent Left | Agent left chat |
| Visitor Left | Visitor left chat |
| Ended by Agent | Agent clicked End Chat |
| Ended by Visitor | Visitor clicked End Chat |
| 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.

SEE ALSO:

[Live Agent for Support Agents](#)

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.

[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.

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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

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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 Salesforce org's chat buttons and agents.

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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.  Note: 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. |

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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. |

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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](#)

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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.

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USER PERMISSIONS

To assign skills:

- "Assign Live Agent Skills to Users"

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](#)

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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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