Salesforce Console

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CONTENTS

SALESFORCE CONSOLE

Salesforce Console apps are a tab-based workspace suited for fast-paced work environments. Manage multiple records on a single screen and reduce time spent clicking and scrolling to quickly find, update, and create records.

The console is perfect for Sales and Service folks. Support agents can use multiple applications at once and keep the context of cases as priorities change. Sales reps have all the tools at their fingertips to cultivate leads, close deals, and manage relationships.

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. Customizations can also include displaying knowledge base articles alongside cases, creating custom actions with keyboard shortcuts, or chatting with customers over the web with Live Agent.

Developers can help solve unique business problems with custom console components and use the Salesforce Console API to add third-party integrations.

> **Note:** You can create console apps in Salesforce Classic and Lightning Experience. When working with Lightning console apps, keep the following things in mind.
>
> Lightning console apps don't yet have full parity with Salesforce Classic console apps. For example, some features in Salesforce Classic console apps, such as push notifications and multi-monitor support, aren't available in Lightning console apps. Learn more.
>
> You can't upgrade Salesforce Classic console apps to Lightning Experience from Setup. To get started in Lightning Experience, customize these Salesforce-provided Lightning console apps: Service Console and Sales Console.

IN THIS SECTION:

How Are Console Apps Different from Standard Apps?

Apps with standard navigation let you open a single record at a time. However, apps with console navigation let you open multiple records at a time, and related records open in subtabs under the original record. In console apps, you also get a handy split view that lets you work quickly through a list of records.

Plan Your Salesforce Console Implementation

Determine whether your console is for Service, Sales, or a unique business need. Think about your console users and what information they need most.

Salesforce Console in Salesforce Classic

Get started with the Salesforce console in Salesforce Classic.

Salesforce Console in Lightning Experience

Get started with the Salesforce console in Lightning Experience.

Salesforce Console Limitations

Understand the limitations of the Salesforce Console.

SEE ALSO:

Salesforce Console Implementation Guide for Salesforce Classic

*Salesforce Console Developer Guide*

Supported Browsers

How Are Console Apps Different from Standard Apps?

Apps with standard navigation let you open a single record at a time. However, apps with console navigation let you open multiple records at a time, and related records open in subtabs under the original record. In console apps, you also get a handy split view that lets you work quickly through a list of records.

Walk Through It: Explore Lightning Console Apps

Here's a look at how standard navigation apps (1) and console navigation apps (2) are different.
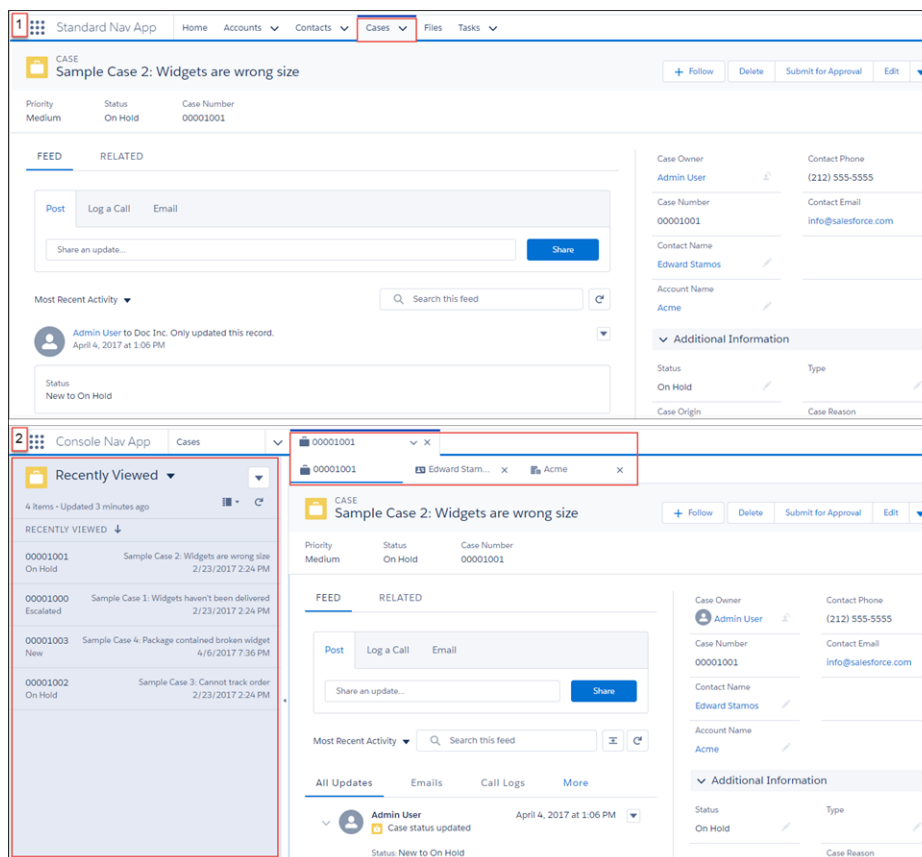
In Lightning console apps, your app's navigation rules determine how records are opened. You can configure related records to open as primary tabs, or as subtabs of a new primary tab. For example, you can have contact records open as a subtab of that contact's account.

With console apps, you can work with multiple records more efficiently. If you work in a fast-paced environment, console apps are a great solution.

SEE ALSO:
Salesforce Console
Plan Your Salesforce Console Implementation

Plan Your Salesforce Console Implementation

Determine whether your console is for Service, Sales, or a unique business need. Think about your console users and what information they need most.

> 📝 **Note:** Lightning console apps don't yet have full parity with Salesforce Classic console apps. For example, some features in Salesforce Classic console apps, such as push notifications and multi-monitor support, aren't available in Lightning console apps. Learn more.
>
> You can't upgrade Salesforce Classic console apps to Lightning Experience from Setup. To get started in Lightning Experience, customize these Salesforce-provided Lightning console apps: Service Console and Sales Console.

Salesforce Classic Consoles
If you're assigned the Service Cloud User feature license, you can review and customize an out-of-the-box console by selecting **Sample Console** from the app menu.

Lightning Experience Consoles
Salesforce provides standard Lightning console apps for Sales and Service. To access these apps, you must be assigned the correct feature license. Go to the App Launcher and click **Service Console** or **Sales Console**. These apps are designed to meet all your Service and Sales needs and can be customized.

You can set up multiple consoles in your Salesforce org so long as you don't exceed your edition's custom apps limit. If you're already using a console for Service, you can create a console for Sales without purchasing separate licenses.

IN THIS SECTION:

Salesforce Console Planning Questions
Review these questions to help you get the most out of your console implementation.

Salesforce Console Implementation Tips
Review these tips to make sure that you're getting the most out of your console implementation.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Lightning console apps are available for an extra cost to users with Salesforce Platform user licenses for certain products. Some restrictions apply. For pricing details, contact your Salesforce account executive.

Lightning console apps are available in the Essentials edition in Lightning Experience only.

Lightning Console Technical Requirements

Review these recommended technical requirements to get the best performance out of your console implementation.

SEE ALSO:

Set Up a Salesforce Console in Salesforce Classic

Create and Edit a Custom Lightning Console App

Supported Browsers

Salesforce Console Limitations

Salesforce Console Implementation Guide for Salesforce Classic

Salesforce Console Planning Questions

Review these questions to help you get the most out of your console 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.

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.

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 Service. You create a console as a custom app that users select from the app menu and App Launcher. If there is a user in your company who is familiar with creating apps in Salesforce, have that person implement console apps.

Which objects do you want users to access in the console?

The navigation tab in Salesforce Classic and the navigation bar in Lightning Experience, lets users select objects, such as cases, accounts, or contacts, and view that object's home page. We recommend that you add objects that function as the center of your business processes. For example, the center of support agents' business process is most likely cases, so make cases available to agents in the console.

How do you want records to display in a console when they're selected?

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.

Salesforce Classic

You can select 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 can set accounts as a primary tab, and cases and contacts as subtabs. You can also 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.

Lightning Experience

In Lightning console apps, primary tabs are called workspace tabs. By default, records open as workspace tabs when selected from the list view associated with the current navigation bar item. Records opened from a workspace tab open as subtabs. For example, if you select accounts from the navigation bar and then click an account in the list, the account opens as a workspace tab. Then, if you click a contact name from the account page, the contact record opens as a subtab.

You can define navigation rules for a console app. Navigation rules determine how records open when they're clicked outside of a workspace tab or subtab containing a record. For example, define a rule so that when you select accounts from the navigation bar and then click an account in the list, it opens as a workspace tab and its associated contact opens as a subtab.

What features can I use in the console?

Salesforce Classic

Available features include things like Highlight Panels, Interaction Logs, Live Agent, a Knowledge sibebar, whitelisitng domains, choosing how lists display, setting up push notifications, keyboard shortcuts, and more.

For a list of features that you can implement in your console, see Console Configurable Features in Salesforce Classic.

Lightning Experience

Customizing a Lightning console app is different than a Salesforce Classic console.

For a list of features that you can implement in your console, see What Features Are Available in Lightning Console Apps?

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) using Open CTI. For more information, see Salesforce Call Center.

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.

What is the Agent Console?

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

SEE ALSO:

Plan Your Salesforce Console Implementation

Salesforce Console Implementation Tips

Supported Browsers

Salesforce Console Implementation Guide for Salesforce Classic

Salesforce Console Implementation Tips

Review these tips to make sure that you're getting the most out of your console implementation.

General Implementation Tips

- A console respects all the security and sharing settings in your Salesforce org.
- To see any setup changes to a console, refresh your browser.

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:

Plan Your Salesforce Console Implementation

Supported Browsers

What Features Are Available in Lightning Console Apps?

Salesforce Console Implementation Guide for Salesforce Classic

Lightning Console Technical Requirements

Review these recommended technical requirements to get the best performance out of your console implementation.

These technical requirements are provided to help you predict whether your hardware and network can provide an acceptable and productive user experience. Salesforce strongly recommends testing the actual end-user experience with a configuration identical to what you expect to use in production. Test using the same geographic location, hardware, browser, network settings, and the expected concurrent users for shared hardware like virtual desktops. In Lightning Experience, page load times can be captured using Lightning Component Debug Mode, or by appending `?eptVisible=1` to your URL.

```
https://yourDomain.lightning.force.com/one/one.app?eptVisible=1
```

Technical Requirements

For the fastest and most stable experience, we recommend:

- An Octane score of 30,000
- Network latency of 150 ms or lower
- Download speed of 3 Mbps or higher
- At least 8 GB of RAM, with 3 GB available for Salesforce browser tabs

Minimum requirements are:

- An Octane score of 20,000
- Network latency of 200 ms or lower
- Download speed of 1 Mbps
- At least 5 GB of RAM, with 2 GB available for Salesforce browser tabs

Based on our lab tests, the minimum requirements result in 50% slower page load times and login load times versus the recommended specifications. Users that use over 1,000 records a day are more likely to have their browser tab crash when using the minimum requirements due to memory limits.

You can find your Octane score, latency, and download speed by appending "speedtest.jsp" to your org's domain.

```
https://yourDomain.lightning.force.com/speedtest.jsp
```

We recommend running this test on the same hardware, network, physical location, and browser as your users. For virtual environments, such as VDI, run all tests from within that virtual environment.

Improving Page Load Times

The most important factors in predicting page load times are Octane score, network latency, download speed, and the amount of customization on a given page. See this knowledge article for more information on how to improve performance.

Improving Octane Scores

Octane is a benchmark developed by Google that measures JavaScript performance. A higher Octane score correlates to faster page load times. Octane factors in your computer hardware and browser choice.

- Using newer-generation hardware with faster CPUs generates higher Octane scores.
- Using the latest version of Salesforce-supported browsers generates higher Octane scores.
    - IE11 results in low Octane scores and much slower page load speeds.

Improving Tab Longevity

The amount of RAM available has a significant impact on browser tab longevity. Having enough RAM available helps prevent crashes. Insufficient RAM can also negatively impact page load times with older browsers.

Improving Virtual Desktop Environment Performance

Virtual desktop environments often have older processors and are shared by many users, resulting in slower page load times. To predict how a virtual desktop performs with Lightning Experience, run performance tests from within the virtual environment. Use as many concurrent users as expected in production, and take their usage patterns into account. Run `speedtest.jsp` to determine the Octane score during concurrent use, and test page load times during concurrent use using Lightning Component Debug Mode or the `eptVisible=1` URL parameter.

If your Octane score is below 20,000, or you have slow page load times, Salesforce recommends upgrading your hardware, reducing the number of users per environment, or using dedicated desktops.

SEE ALSO:

Octane Frequently Asked Questions

Improve Performance and Speed in Lightning Experience

Lightning Components Developer Guide: Enable Debug Mode for Lightning Components

Supported Browsers

Salesforce Console in Salesforce Classic

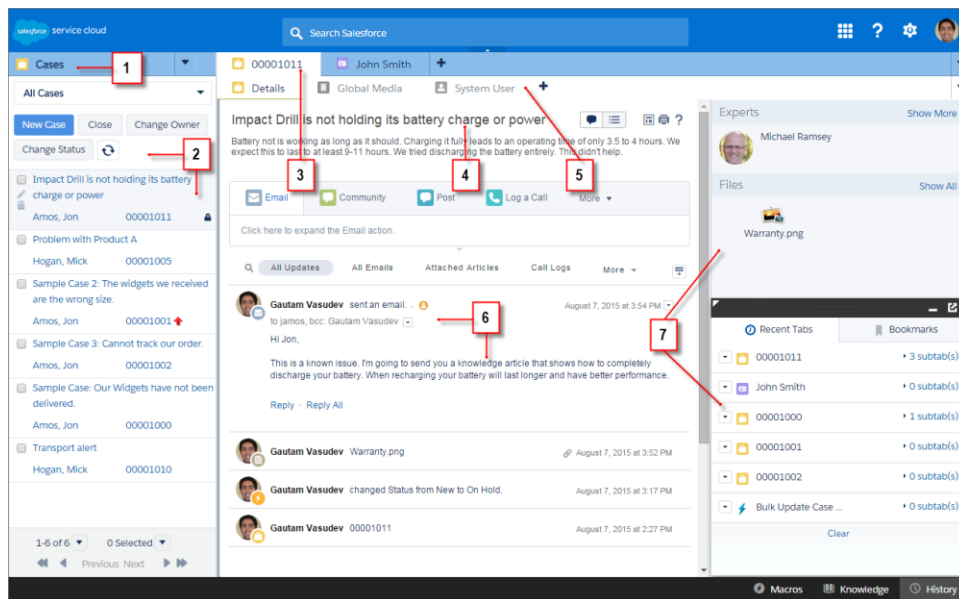Get started with the Salesforce console in Salesforce Classic.

Watch a Demo: ▶ Introducing the Salesforce Console (English only)

Salesforce Console User Interface

Here's how a console in Salesforce Classic works:

(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.

📝 Note: Lightning console apps don't yet have full parity with Salesforce Classic console apps. For example, some features in Salesforce Classic console apps, such as push notifications and multi-monitor support, aren't available in Lightning console apps. Learn more.

You can't upgrade Salesforce Classic console apps to Lightning Experience from Setup. To get started in Lightning Experience, customize these Salesforce-provided Lightning console apps: Service Console and Sales Console.

IN THIS SECTION:

Set Up a Salesforce Console in Salesforce Classic

You can set up a console for Sales, Service, or create one for your own business needs.

Console Configurable Features in Salesforce Classic

An administrator must enable and configure most console features to determine how console users view and work with data.

Customize a Console with Custom Components in Salesforce Classic

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

Work with a Salesforce Console in Salesforce Classic

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

SEE ALSO:

Salesforce Classic Console Limitations

Supported Browsers

Salesforce Console Implementation Guide for Salesforce Classic

Salesforce Console Developer Guide

Salesforce Console in Lightning Experience

Set Up a Salesforce Console in Salesforce Classic

You can set up a console for Sales, Service, or create one for your own business needs.

IN THIS SECTION:

Set Up a Service Console in Salesforce Classic

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

Set Up Sales Console in Salesforce Classic

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

Set Up a Salesforce Console App in Salesforce Classic

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

Brand a Salesforce Console in Salesforce Classic

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

Hide a Salesforce Classic Console from the App Launcher in Lightning Experience

By default, Salesforce Classic consoles appear in the App Launcher in Lightning Experience. This visibility lets your console users access all your consoles apps, ones created in Salesforce Classic and ones created in Lightning Experience, without having to switch Uls. You can change this behavior if you want to limit access to your Salesforce Classic consoles.

SEE ALSO:

Salesforce Console in Lightning Experience

> **EDITIONS**
>
> Available in: Salesforce Classic (not available in all orgs)
>
> Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Set Up a Service Console in Salesforce Classic

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.

SEE ALSO:

Salesforce Console Implementation Tips

Console Configurable Features in Salesforce Classic

Salesforce Console Implementation Guide for Salesforce Classic

Lightning Service Console

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

USER PERMISSIONS

To create a Salesforce console for Service:
- Customize Application

  AND

  Service Cloud User

To customize a Salesforce console for Service:
- Customize Application

Assign the Service Cloud Feature License to Users

The Service Cloud User feature license entitles users to additional Salesforce features, such as the Service 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 Service Console in Salesforce Classic](#)

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.

SEE ALSO:

Set Up a Service Console in Salesforce Classic

Set Up Sales Console in Salesforce Classic

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. Assign this permission set license to users. The steps are the same as assigning any permission set license.

4. Assign the Salesforce Console User Permission Set to Sales Console 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.

> 💡 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:

Salesforce Console Implementation Tips

Console Configurable Features in Salesforce Classic

Salesforce Console Implementation Guide for Salesforce Classic

Lightning Sales Console

Assign the Salesforce Console User Permission Set to Sales Console Users

After you've assigned the "Sales Console User" permission set license to users, assign users to the "Salesforce Console User" permission set.

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

2. Select **Salesforce Console User**. This standard permission set is already created for you and comes with the Sales Console permission set license.

3. Click **Manage Assignments** and assign users to the permission set.

You can also choose to clone the "Salesforce Console User" permission set instead and assign Sales Console users to the clone instead.

SEE ALSO:

Assign a Permission Set License to a User

Set Up Sales Console in Salesforce Classic

Standard Permission Sets

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

USER PERMISSIONS

To create permission sets:
- Manage Users

Set Up a Salesforce Console App in Salesforce Classic

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

Watch a Demo: ⏵ Plan Your Salesforce Console Implementation (English only)

Each console is a custom app that users select from the Lightning Platform 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 Lightning Platform 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**.

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

Brand a Salesforce Console in Salesforce Classic

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.

<div style="float:right">

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

USER PERMISSIONS

To define colors in the Salesforce console:
- Customize Application

</div>

Hide a Salesforce Classic Console from the App Launcher in Lightning Experience

By default, Salesforce Classic consoles appear in the App Launcher in Lightning Experience. This visibility lets your console users access all your consoles apps, ones created in Salesforce Classic and ones created in Lightning Experience, without having to switch UIs. You can change this behavior if you want to limit access to your Salesforce Classic consoles.

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

2. From the list of available apps, click **Visible in App Launcher** or **Hidden in App Launcher** to show or hide individual apps from the App Launcher in Lightning Experience for all users in the org.

   Alternatively, you can also remove access to the Salesforce Classic console for individual users through their profiles.

Console Configurable Features in Salesforce Classic

An administrator must enable and configure most console features to determine how console users view and work with data.

> 📝 **Note:** To edit a Salesforce Classic 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.

> 📝 **Note:** You can't upgrade a Salesforce Classic console app to Lightning Experience. You can choose to display or hide the app in the Lightning Experience App Launcher, but you can't edit the app from the App Manager page in Lightning Experience Setup. To get started in Lightning Experience, customize these Salesforce-provided Lightning console apps: Service Console and Sales Console. You can also recreate your Salesforce Classic console app in Lightning Experience, but using Salesforce's out-of-the-box app is faster and easier.

Feature	Automatically Enabled?	Available in a Console for Sales	Available in a Console for Service
Brand a Console		✔	✔
Highlights Panel		✔	✔
Pinned Lists	✔	✔	✔
Push Notifications		✔	✔
Responsive Lists		✔	✔
Keyboard Shortcuts	✔	✔	✔
Save User Sessions	✔	✔	✔
Whitelist Domains		✔	✔
Console Components		✔	✔
History Component	✔	✔	✔
Multi-Monitor Components	✔	✔	✔
Interaction Logs		✔	✔
Knowledge Sidebar		✔	✔
Knowledge One Footer		✔	✔
Softphone Integration		✔	✔
Live Agent			✔

Macros   ✔

Add a Highlights Panel to the Console in Salesforce Classic

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

A highlights panel can include any standard or custom fields that have 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.

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**

IN THIS SECTION:

Configure Highlights Panels for a Console in Salesforce Classic

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 configure a highlights panel, edit any page layout.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

Configure Highlights Panels for a Console in Salesforce Classic

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 configure a highlights panel, edit any page layout.

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.

Set Up Interaction Logs for a Console in Salesforce Classic

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.

IN THIS SECTION:

[Turn On Interaction Logs for a Console in Salesforce Classic](#)

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

[Assign Interaction Logs in Salesforce Classic](#)

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

Turn On Interaction Logs for a Console in Salesforce Classic

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.

Assign Interaction Logs in Salesforce Classic

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.

Configure Console Preferences in Salesforce Classic

You can configure your console to fit your business needs. As your needs change, you can adjust these preferences. You configure console preferences in Setup.

IN THIS SECTION:

Choose How Lists Display in a Salesforce Console in Salesforce Classic

Administrators can change how lists appear to console users.

Optimize Salesforce Console List Views with Responsive Lists in Salesforce Classic

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.

Save User Sessions for a Salesforce Console in Salesforce Classic

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.

Whitelist Domains for a Salesforce Console in Salesforce Classic

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.

Customize Keyboard Shortcuts for a Salesforce Console in Salesforce Classic

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

Configure Push Notifications for a Salesforce Console in Salesforce Classic

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.

Turn On the History Component for a Salesforce Console in Salesforce Classic

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.

Turn On Multi-Monitor Components for a Salesforce Console in Salesforce Classic

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.

Choose How Lists Display in a Salesforce Console in Salesforce Classic

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.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

USER PERMISSIONS

To choose how lists display:
- Customize Application

List Type	Description
Pinned to left	Lists appear on the left side of the page and are always visible. When you select a record from the list, it opens in a new tab to the right of the list.

To change how lists display:

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

2. Select a console app.

3. Click **Edit**.

4. Choose how you want lists to display. If you choose pinned lists, specify a default size, in pixels or percentage of screen space.

5. Click **Save**.

SEE ALSO:

Optimize Salesforce Console List Views with Responsive Lists in Salesforce Classic

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**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

SEE ALSO:

[Edit List View Filters in Salesforce Classic](#)

[Console Configurable Features in Salesforce Classic](#)

Save User Sessions for a Salesforce Console in Salesforce Classic

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:

[Console Configurable Features in Salesforce Classic](#)

Whitelist Domains for a Salesforce Console in Salesforce Classic

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:

[Console Configurable Features in Salesforce Classic](#)

Customize Keyboard Shortcuts for a Salesforce Console in Salesforce Classic

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:

Work with Keyboard Shortcuts in a Salesforce Console in Salesforce Classic

Default Keyboard Shortcuts for a Salesforce Console in Salesforce Classic

Console Configurable Features in Salesforce Classic

Configure Push Notifications for a Salesforce Console in Salesforce Classic

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.

   > 📝 **Note:** If you don't see this option, enable Streaming API in your org.

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

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

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

USER PERMISSIONS

To configure push notifications:
- Customize Application

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

5. Click **Select objects and fields for notifications**, and select **Edit**. The push notification settings you choose here apply to all your console apps.

6. Select the objects that you want to trigger push notifications. For example, if you want any changes to cases or case fields to trigger push notifications, move Cases from Available Items to Selected Items.

7. Under Fields, click **Edit** and choose the fields you want to trigger push notifications.

8. Click **OK**, then select **Save**.

9. 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:

View Push Notifications in a Salesforce Console in Salesforce Classic

Console Configurable Features in Salesforce Classic

Turn On the History Component for a Salesforce Console in Salesforce Classic

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:

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

    Console Configurable Features in Salesforce Classic

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

USER PERMISSIONS

To turn on the History component:
- Customize Application

Turn On Multi-Monitor Components for a Salesforce Console in Salesforce Classic

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:

    Guidelines for Working with Salesforce Console Multi-Monitor Components in Salesforce Classic

    Console Configurable Features in Salesforce Classic

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

USER PERMISSIONS

To turn on multi-monitor components:
- Customize Application

Turn On Knowledge for a Salesforce Console in Salesforce Classic

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

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

1. From the object management settings for cases, go to Page Layouts.

2. Click **Edit** next to a page layout.

3. Click **Layout Properties**.

4. Check `Knowledge Sidebar`, and click **OK**.

5. Click **Save**.

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

SEE ALSO:

Find Object Management Settings

Console Configurable Features in Salesforce Classic

Customize a Console with Custom Components in Salesforce Classic

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 Canvas or the Console API to build components.
Both technologies are JavaScript APIs that let developers extend or integrate a console. The Console API provides you with programmatic
access to a console to do things like open and close tabs to streamline business processes, whereas Canvas helps you integrate a console
with external applications that require authentication methods.

For more information about canvas apps or the toolkit, see *Canvas Developer Guide* and the *Salesforce Console Developer's Guide*.

IN THIS SECTION:

Create Console Components in Salesforce Classic

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

Console Component Implementation Tips in Salesforce Classic

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

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.

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.

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

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.

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

Create Console Components in Salesforce Classic

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 in Salesforce Classic," and in the `Type` field, select Lookup or Related List to choose a specific field or list.

> **EDITIONS**
>
> Available in: Salesforce Classic (not available in all orgs)
>
> Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

SEE ALSO:

Console Component Implementation Tips in Salesforce Classic

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
`id`	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.

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

Add Console Components to Page Layouts in Salesforce Classic

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.

1. From the object management settings for the object whose page layout you want to edit, go to Page Layouts.

2. Click **Edit** next to a page layout.

3. Click **Custom Console Components**.

4. 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 in Salesforce Classic.

5. 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
   - Community 360 - 400

6. 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.

- Add the Community 360 component if you've enabled Community 360 in a community, and assigned it to the correct profiles.

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 in Salesforce Classic

Add a Report Chart to a Page Layout

Find Object Management Settings

Set Up Community 360

Add Quick Actions to the Console Sidebar in Salesforce Classic

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

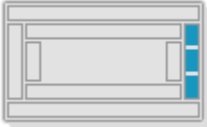Create the quick actions before adding them to the Case page layouts in the console.

1. From Setup, enter *Page Layouts* in the Quick Find box, then select **Page Layouts**
   under Cases.

2. Select a page layout to work with.

3. Click **Custom Console Components**.

4. Scroll to the sidebar section where you want to add the quick action component. For example,
   to add it to the left sidebar, go to the **Left Sidebar** section.

5. Configure the quick action component:

   - Field: Select the record field that the quick action affects. For example, if the quick action
     creates a contact record, select the Contact field.

   - Enable Linking: If selected, support agents can associate this record with a case. For
     example, a support agent can create a contact and link it to a case.

   - Create Action: Select the "Create" quick action. This quick action lets support agents
     create a record.

   - Update Action: Select the "Update" quick action. This quick action lets support agents update a record.

6. Add more quick action components as needed.

7. Click **Save**.

SEE ALSO:

Add Console Components to Page Layouts in Salesforce Classic

Sidebar Styles for Console Components in Salesforce Classic

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.

Multi-Component Type	Description
Tabs	A single content area with a list of multiple panels.
Accordion	A collapsible content area.

This style is only available for vertical sidebars.

Add Console Components to Apps in Salesforce Classic

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 in Salesforce Classic

Assign a Console Component to an App in Salesforce Classic

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 in Salesforce Classic

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

USER PERMISSIONS

To assign custom console components to an app:
- Customize Application

Work with a Salesforce Console in Salesforce Classic

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.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

Learn How to Navigate the Salesforce Classic Console

Learn about how to navigate your console efficiently.

IN THIS SECTION:

Tabs and Navigation in the Salesforce Classic Console

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.

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

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.

Resize and Minimize Pinned Lists in a Salesforce Console in Salesforce Classic

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

Guidelines for Working with Salesforce Console Multi-Monitor Components in Salesforce Classic

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.

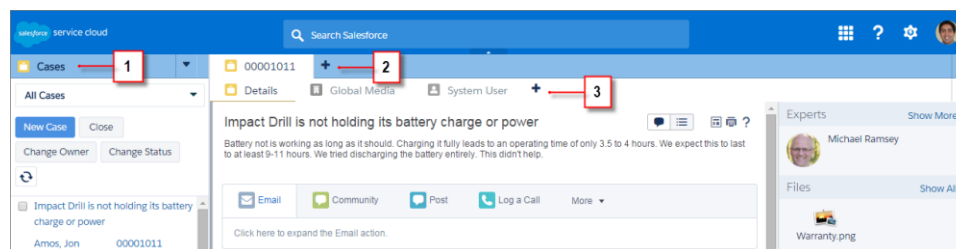## Tabs and Navigation in the Salesforce Classic Console

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 (not available in all orgs)
>
> 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.

IN THIS SECTION:

1. Salesforce Console Navigation Tab in Salesforce Classic
   Use the navigation tab to select an object and view its home page.
2. Work with Salesforce Console Primary Tabs and Subtabs in Salesforce Classic
   Learn how you can get the most out of working with a console's primary tabs and subtabs.

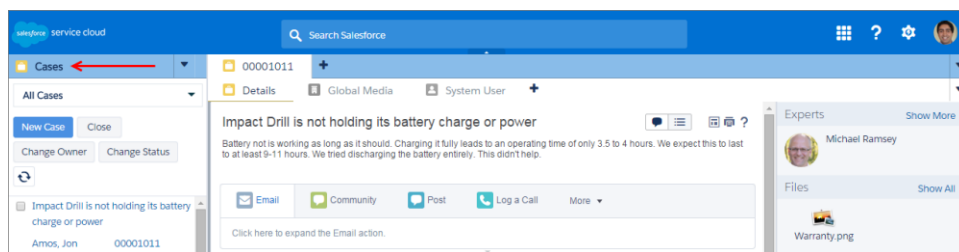## Salesforce Console Navigation Tab in Salesforce Classic

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

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.

Work with Salesforce Console Primary Tabs and Subtabs in Salesforce Classic

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

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 in Salesforce Classic on page 39.

⚠ **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.

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

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:
    Work with Salesforce Console Primary Tabs and Subtabs in Salesforce Classic
    Work with a Salesforce Console in Salesforce Classic

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Resize and Minimize Pinned Lists in a Salesforce Console in Salesforce Classic

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:
    Work with a Salesforce Console in Salesforce Classic

EDITIONS
Available in: Salesforce Classic (not available in all orgs)
Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Work with Keyboard Shortcuts in a Salesforce Console in Salesforce Classic

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

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

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

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

SEE ALSO:

Work with a Salesforce Console in Salesforce Classic

Default Keyboard Shortcuts for a Salesforce Console in Salesforce Classic

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

Command	Description	Shortcut
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. Enter a number from 1 through 9. ✎ Note: Not supported for Microsoft® Internet Explorer® versions 7 or 8 or for right-to-left languages. If you choose the	F+Right Arrow or Left Arrow+*number*

Command	Description	Shortcut
	Macros or Presence component, press Esc to move the cursor to other components.	
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. 📝 **Note:** Not supported for Microsoft® Internet Explorer® 11 or Microsoft® Edge.	Windows: Ctrl+Mouse Click macOS: Cmd+Mouse Click
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

Command	Description	Shortcut
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 in Salesforce Classic

Work with a Salesforce Console in Salesforce Classic

Keyboard Shortcuts for Lightning Console Apps

Guidelines for Working with Salesforce Console Multi-Monitor Components in Salesforce Classic

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 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.

💡 **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.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

SEE ALSO:

Work with a Salesforce Console in Salesforce Classic

Work with Records in the Salesforce Console in Salesforce Classic

Working with records in the console is super easy.

IN THIS SECTION:

Add Notes to Records in a Salesforce Console in Salesforce Classic

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

View Push Notifications in a Salesforce Console in Salesforce Classic

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

Add Notes to Records in a Salesforce Console in Salesforce Classic

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:

Work with a Salesforce Console in Salesforce Classic

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

View Push Notifications in a Salesforce Console in Salesforce Classic

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 (not available in all orgs)

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

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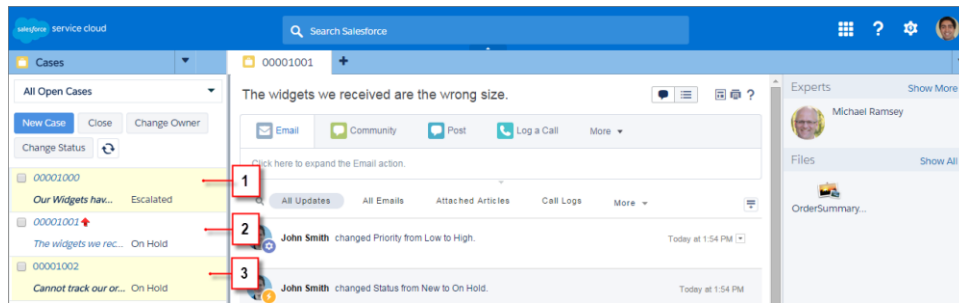
(1) Yellow when a record changes. (2) Blue if it's the last item you viewed. (3) Bold and italic when a field specified by an admin changes.

📝 **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 Softphone in the Salesforce Console in Salesforce Classic

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.

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.

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

EDITIONS
Available in: Salesforce Classic (not available in all orgs)
Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS
To view and use the softphone: • Member of a call center

SEE ALSO:

Find Knowledge Articles in a Salesforce Console in Salesforce Classic

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:

    Salesforce Knowledge Documentation Overview

Use Live Agent in the Salesforce Console in Salesforce Classic

Live Agent is a chat solution that can be fully integrated with the Salesforce console.

For more information, check out *Live Agent for Support Agents* and *Live Agent for Support Supervisors*.

SEE ALSO:

    Live Agent for Support Agents (Salesforce Classic)

    Live Agent for Support Supervisors (Salesforce Classic)

Salesforce Console in Lightning Experience

Get started with the Salesforce console in Lightning Experience.

Use Lightning console apps to view multiple records and their related records on the same screen, and quickly work through records from a list using split view. To open Lightning console apps, use the App Launcher.
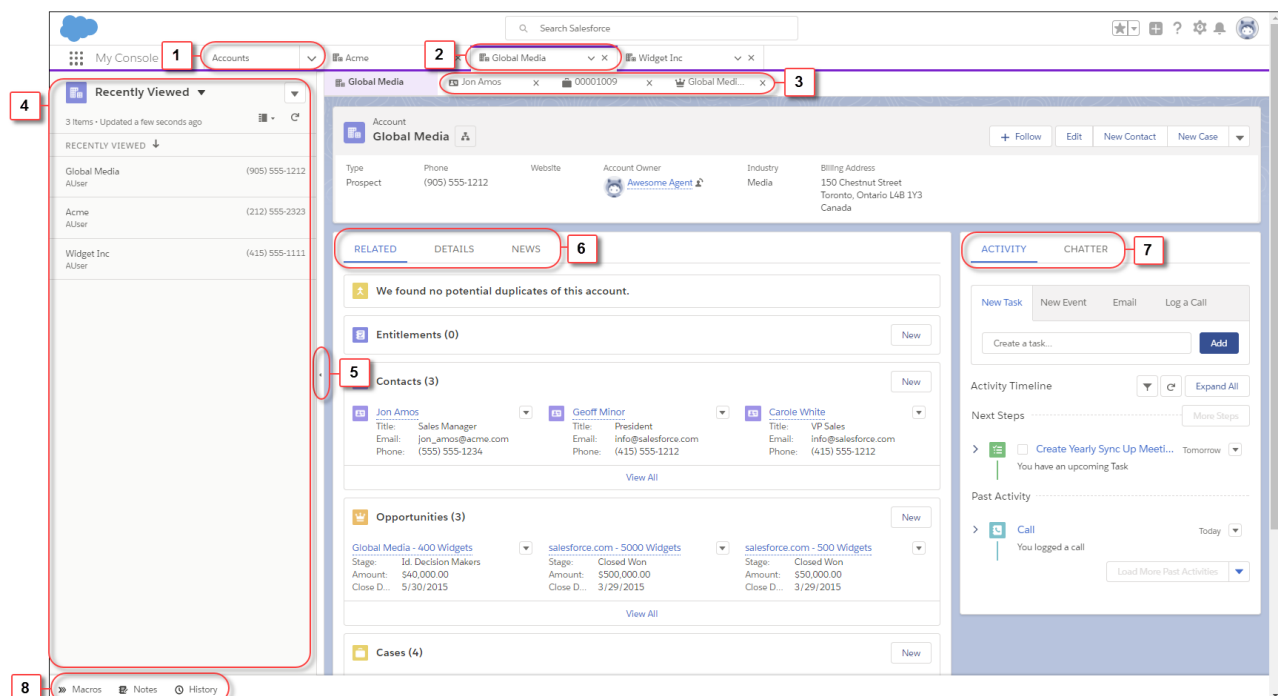
Lightning Console App User Interface

Here's how a Lightning console app works:

To select objects, use the item menu in the navigation bar (1). Records selected from the table list view or split view open as workspace tabs (2). When you click related records from the workspace tab, those records open as subtabs (3). To keep you efficient and productive,

split view lets you work with a list view while still working on other records (4). You can close and open split view whenever you want—click the arrow on the split view pane (5). You can also click anywhere in the vertical divider between split view and record page. You can view and update a record using the details area (6) and the feed (7). Keep in mind that page layouts can be different for each type of record. Finally, utilities let you access common processes and tools, like History and Notes (8).

In this example, there are two workspace tabs open—Acme and Global Media. Under the Global Media workspace tab, there are three subtabs open—the contact record for Jon Amos, a related case, and a related opportunity. In the History utility, you can easily access your recently opened records.

> 📝 **Note:** Lightning console apps don't yet have full parity with Salesforce Classic console apps. For example, some features in Salesforce Classic console apps, such as push notifications and multi-monitor support, aren't available in Lightning console apps. Learn more.
>
> You can't upgrade Salesforce Classic console apps to Lightning Experience from Setup. To get started in Lightning Experience, customize these Salesforce-provided Lightning console apps: Service Console and Sales Console.

IN THIS SECTION:

What Features Are Available in Lightning Console Apps?

Lightning console apps don't yet have full parity with Salesforce Classic console apps. Some features available in Salesforce Classic console apps aren't available in Lightning console apps.

Who Can Access Lightning Console Apps?

To access and use a Lightning console app, users must have the Lightning Console User permission and their profile must be added to the Lightning console app.

Create and Edit a Custom Lightning Console App

Create custom console apps in Lightning Experience the same way that you create other Lightning Apps. Use the App Manager in Setup to customize your app's color and branding, add a utility bar and items, configure navigation rules, and assign the app to user profiles. You can always come back and edit your console app at any time.

Create and Assign Lightning Console Permission Sets

If your org has purchased Lightning Console permission set licenses, you can assign the licenses to users with Salesforce Platform licenses to add access to Lightning console apps.

Customize Your Lightning Console Pages

Use the Lightning App Builder to create custom Lightning pages to ensure that your console users always have the records they need in a layout that works best for them.

Personalize the Navigation Bar

Customize a console app's navigation bar to suit the unique way you work. You can add and reorder items, and rename or remove items you've added.

Customize Your Lightning Console App with Utilities

The utility bar is a great way to give your console users quick access to productivity tools, like softphones and History. It appears as a fixed footer in your Lightning console app and opens utilities in docked panels.

Lightning Service Console

The Service Console is a standard Salesforce Lightning console app that meets all your service needs. You can customize this app to make it your own.

Lightning Sales Console

The Lightning Sales Console is a standard Salesforce Lightning app that gives you all your sales tools at your fingertips to prospect leads, close deals, and manage relationships.

Keyboard Shortcuts for Lightning Console Apps

Use keyboard shortcuts to work efficiently in Lightning console apps. Shortcuts help you navigate and work with records faster and without using your mouse. You can use these shortcuts with your web browser shortcuts.

SEE ALSO:

Lightning Experience Console Limitations

Supported Browsers

Salesforce Console Developer Guide

Salesforce Console in Salesforce Classic

What Features Are Available in Lightning Console Apps?

Lightning console apps don't yet have full parity with Salesforce Classic console apps. Some features available in Salesforce Classic console apps aren't available in Lightning console apps.

📝 **Note:** You can't upgrade a Salesforce Classic console app to Lightning Experience. You can choose to display or hide the app in the Lightning Experience App Launcher, but you can't edit the app from the App Manager page in Lightning Experience Setup. To get started in Lightning Experience, customize these Salesforce-provided Lightning console apps: Service Console and Sales Console. You can also recreate your Salesforce Classic console app in Lightning Experience, but using Salesforce's out-of-the-box app is faster and easier.

Feature or Setting	Available in Salesforce Classic console apps?	Available in Lightning Experience console apps?	Notes
General functionality and customization			
Custom branding	Yes	Yes	In Lightning Experience, edit your branding from the App Manager in Setup.
Navigation rules	Yes	Yes	In Salesforce Classic, this setting is called Choose How Lists and Records Display. In Lightning Experience, edit your navigation rules from the App Manager in Setup.
Split view	Yes	Yes	In Salesforce Classic, this feature is called pinned lists and you configure it with the Choose List Placement setting. In Lightning Experience, split view is enabled by default, and users can open or minimize split view. The Salesforce Classic Pinned to Top setting isn't available in Lightning Experience.

Feature or Setting	Available in Salesforce Classic console apps?	Available in Lightning Experience console apps?	Notes
Resizeable split view	Yes	No	Future release (unplanned) In Salesforce Classic, you can adjust the width of a pinned list. In Lightning Experience, you can't adjust the width of split view.
Keyboard shortcuts	Yes	Yes	In Lightning Experience, this feature is enabled by default. Use Ctrl+/ on Windows or Cmd+/ on macOS to view the available shortcuts.
Custom keyboard shortcuts	Yes	No	Future release
Interaction logs	Yes	No	Future release (unplanned)
Dynamic list updates (push notifications)	Yes	No	Future release
Case hovers	Yes	Yes	Lightning Experience provides this functionality by default. To customize the title and fields displayed in the case hover, edit the case's compact layout.
Remember open tabs	Yes	Yes	In Salesforce Classic, this setting is called Save User Sessions. Lightning Experience provides this functionality by default and autosaves tabs every minute. Salesforce Classic saves only on browser tab refresh, close, or logout. Lightning console apps always open with the tabs and list that you last opened.
Pin workspace tabs	Yes	Yes	In Salesforce Classic, you pin tabs from the tab menu in the far-right corner of console. In Lightning Experience, you pin tabs from the tab menu on each workspace tab.
Tab limits	Yes	No	Future release (unplanned)
Third-party domain workspace tabs and subtabs (whitelist domains)	Yes	Yes	Use the openTab or openSubtab JavaScript API methods to open web tabs inside Lightning console apps. Third-party domains must be whitelisted in the CSP Trusted Sites list to be used with openTab and openSubtab in Lightning Experience.
Console API (JavaScript APIs for navigation and utilities)	Yes	Yes	Two APIs interact with Salesforce console apps: the Salesforce Console Integration Toolkit (used in Salesforce Classic) and the Lightning Console JavaScript API (used in Lightning Experience). The Salesforce Console Integration Toolkit used with Salesforce Classic console apps allows automation within Visualforce pages, but the APIs don't work for Visualforce in Lightning console apps. Not all Salesforce Console

Feature or Setting	Available in Salesforce Classic console apps?	Available in Lightning Experience console apps?	Notes
			Integration Toolkit JavaScript API methods have a similar method in the Lightning Console JavaScript APIs.
			When you're using the Lightning Console JavaScript API in Lightning Experience, you use methods in the JavaScript controller of a Lightning component. You can't use the Lightning Console JavaScript API in Visualforce pages or other iFramed pages within a Lightning console app.
			For more information about both APIs, see the *Salesforce Console Developer Guide*.
External object support	Yes	Yes	External objects are mapped to data that's stored outside of your org. An external object's tab title is based on its name field.
Internet Explorer 11 support	Yes	Yes	You can access Lightning console apps in IE11, but expect significant performance issues. We recommend using a different browser. Keep in mind that support for IE11 ends on December 16, 2017, unless you opt in to extend support. If you opt in to Extended Support for IE11, you can continue to use IE11 to access Lightning Experience until December 31, 2020.
Utility functionality			
Utility bar	Yes	Yes	In Salesforce Classic, this feature is called the console footer. You can choose whether to align components to the left or right of the console's footer.
			Lightning Experience provides this functionality through the utility bar. Add utilities to your console app from the App Manager in Setup. By default, utilities are aligned to the left side. You can't change this alignment.
			📝 Note: The utility bar doesn't support Visualforce components.
History utility	Yes	Yes	In Salesforce Classic, this feature is called the History footer component.
Macros utility	Yes	Yes	In Salesforce Classic, this feature is called the Macros Browser footer component. In Lightning Experience, macros are accessed in the utility bar, and you create them using the Macro Builder.

Feature or Setting	Available in Salesforce Classic console apps?	Available in Lightning Experience console apps?	Notes
Multi-monitor—pop-out utilities	Yes	No	Future release In Salesforce Classic, this feature is called multi-monitor components.
Notes utility	No	Yes	In Lightning Experience, use the Notes utility to create, view, and associate notes with records.
Softphone utility	Yes	Yes	You can add softphones to your Lightning console app that uses Lightning Dialer or Open CTI.
Background utility items	No	Yes	Background utility items run without a visible button in the utility bar. They add functionality to a Lightning console app without cluttering the user experience.
Component functionality			
Region presentation—size	Yes	No	Future release (unplanned) In Salesforce Classic, you can adjust the size of a component. In Lightning Experience, the page template for your record page determines the size of the component region. For example, the three columns page template provides a main column width of 50%, and the side columns widths are each 25%. To view the available page templates, create a page in Lightning App Builder.
Component presentation—stack, tabs, or accordion	Yes	Yes	In Lightning Experience, use Lightning App Builder to customize how your components appear. You can stack components or use the Tabs or Accordion component to nest other components.
Related List - Single component	Yes	Yes	In Salesforce Classic, this feature is called the Related List component. In Lightning Experience, use Lightning App Builder to add this component.
Related Record component	Yes	Yes	In Salesforce Classic, this feature is called the Lookup component. In Lightning Experience, use Lightning App Builder to add this component.
Highlights Panel component	Yes	Yes	In Lightning Experience, use Lightning App Builder to add this component. Then customize the content with compact layouts or page layouts. By default, the Lightning Service Console app includes a highlights panel for cases.
Pinned region components (a component that spans subtabs)	Yes	Yes	In Salesforce Classic, this feature is called Primary Tab Sidebar Components and is configured by adding sidebar

Feature or Setting	Available in Salesforce Classic console apps?	Available in Lightning Experience console apps?	Notes
			components to a page layout. In Lightning Experience, use Lightning App Builder to create a new page using the pinned region page templates. You can choose a template that lets you pin a page's header, left sidebar, or both.
Multi-monitor—pop-out workspaces	Yes	No	Future release In Salesforce Classic, this feature is called multi-monitor components.
Visualforce overrides	Yes	Partial	Future release Visualforce overrides for new, edit, view, tab, list, and clone actions are supported. The delete action isn't supported.
Lightning component overrides	No	Yes	Action overrides that use Lightning components for View, New, Edit, and Tab are supported in Lightning console apps. When a user performs an action that's overridden with a Lightning component, the content from the custom action appears in a tab or subtab. When the split view is open, tab action overrides load the Lightning component in a split-view container that is 400-pixels wide.
Service Console functionality			
Service-specific Setup flows	No	Yes	In Lightning Experience, the Service Console app comes with Service-specific setup flows to get you up and running quickly. The flows walk you through setting up Email-to-Case, integrating with Twitter and Facebook, creating a Lightning Community, and enabling Lightning Knowledge, Live Agent, and Omni-Channel.
Quick text	Yes	Yes	In Salesforce Classic, use `;;` on both Windows and macOS. In Lightning Experience, use `Ctrl + .` on Windows and `Cmd + .` on macOS.
Knowledge component	Yes	Yes	In Salesforce Classic, this feature is called the Knowledge One sidebar component. In Lightning Experience, use Lightning App Builder to add the Knowledge component to the case page. Lightning Knowledge is different from Knowledge in Salesforce Classic. Learn more.

Feature or Setting	Available in Salesforce Classic console apps?	Available in Lightning Experience console apps?	Notes
Omni-Channel utility	Yes	Yes	In Salesforce Classic, this feature is called the Omni-Channel footer component.
Live Agent	Yes	Yes	In Lightning Experience, Live Agent works a bit differently. Learn more. ✏️ **Note:** Live Agent is available only in the Lightning Service Console app.
Sales Console functionality			
Person accounts	Yes	Yes	Lightning console apps support person accounts with some differences. For more information, see Lightning Experience Console Limitations.
Forecasts	No	Yes	In Lightning Experience, add forecasts to your console app from the App Manager in Setup.

SEE ALSO:

Lightning Experience Console Limitations

Lightning Experience Roadmap

Who Can Access Lightning Console Apps?

To access and use a Lightning console app, users must have the Lightning Console User permission and their profile must be added to the Lightning console app.

You can enable the Lightning Console User permission for the following user licenses.

User License	Description
Salesforce	Access is enabled. For users with Salesforce licenses, such as Sales Cloud and Service Cloud feature licenses, the Lightning Console User permission is enabled by default. You can't disable the Lightning Console User permission for users with a Salesforce user license.
Salesforce Platform	Available for an extra cost. Some restrictions apply. For more information, contact your Salesforce account executive. For users with Salesforce Platform licenses, you assign a Lightning Console permission set license to enable the Lightning Console User permission.

> 🖉 **Note:** You can assign the Lightning Console permission set license only to users with a Salesforce Platform license. For example, you can't assign the Lightning Console permission set license to users with Customer Community, Customer Community Plus, and Partner Community licenses. For more information about which user licenses and products can purchase this permission set license, contact your Salesforce account executive.

To add profiles to a Lightning console app, go to App Manager in Setup and edit the console app.

SEE ALSO:

Create and Assign Lightning Console Permission Sets

Create and Edit a Custom Lightning Console App

Create custom console apps in Lightning Experience the same way that you create other Lightning Apps. Use the App Manager in Setup to customize your app's color and branding, add a utility bar and items, configure navigation rules, and assign the app to user profiles. You can always come back and edit your console app at any time.

1. From the Home tab in Setup, enter *App* in the `Quick Find` box, then select **App Manager**

2. Click **New Lightning App**, and walk through the New Lightning App wizard.

3. On the App Details and Branding page, give your app a name and description, set its primary branding color, and give it a logo.

   > 💡 **Tip:** The app description displays alongside the icon in the App Launcher. Make the description meaningful to your users.

4. On the App Options page, select **Console navigation**. If you want to use Lightning Service Setup, select **Include Service Setup**.

5. On the Utility Bar page, add any utilities that you want your console users to work with.

6. On the Select Items page, add the items you want to include in the console app.

7. On the Navigation Rules page, determine how you want records to open in your console app. Choose an object and decide whether it opens as a workspace tab or as a subtab of a related record.

   > 💡 **Tip:** Use navigation rules to keep your console users efficient. For example, define a rule so that when a user clicks a contact, it opens as a subtab of that contact's related account.

8. On the Assign to User Profiles page, select the profiles you want to access the console app.

SEE ALSO:

Who Can Access Lightning Console Apps?

Customize Your Lightning Console Pages

Customize Your Lightning Console App with Utilities

Lightning Experience Console Limitations

EDITIONS

Available in: Lightning Experience

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

Lightning console apps are available for an extra cost to users with Salesforce Platform user licenses for certain products. Some restrictions apply. For pricing details, contact your Salesforce account executive.

USER PERMISSIONS

To view apps:
- View Setup and Configuration

To manage apps:
- Customize Application

Create and Assign Lightning Console Permission Sets

If your org has purchased Lightning Console permission set licenses, you can assign the licenses to users with Salesforce Platform licenses to add access to Lightning console apps.

📝 **Note:** Users with Salesforce licenses, such as Sales Cloud and Service Cloud feature licenses, already have the Lightning Console User permission enabled. You can't disable this user permission for these users. Don't assign the Lightning Console permission set license to those with Salesforce user licenses. These users can already access Lightning console apps.

Each Salesforce Platform license user needs a Lightning Console permission set license to use Lightning console apps. Creating a Lightning Console permission set and assigning it to a user auto-assigns the Lightning Console permission set license to that user.

Create a Lightning Console permission set that enables the following permission.

User Permission	What It Enables
Lightning Console User	Ability to access and work with Lightning console apps. Users can access the apps from the Lightning Experience App Launcher.

Create and assign the permission set to one or more Salesforce Platform users. You can assign the permission set either one at a time or in bulk.

⛔ **Important:** Complete these steps only if your org has purchased Lightning Console permission set licenses.

1. Verify how many Lightning Console permission set licenses your Salesforce org has.

    From Setup, enter `Company Information` in the `Quick Find` box, then select **Company Information** and scroll down to Permission Set Licenses. You can see how many permission set licenses are available and have already been assigned. You can also see how many types of permission set licenses you have for different features.

2. Create the permission set.

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

    b. Click **New**.

    c. Enter your permission set information. Enter `Lightning Console` for the name.

    d. From the License dropdown menu, select **Lightning Console**.

    e. Click **Save**.

        The Permission Set Overview page shows the new permission set. Now add user permissions to the set.

    f. Click **System Permissions** to open the list of user permissions enabled by the Lightning Console permission set. Then click **Edit**.

    g. Enable **Lightning Console User**.

    h. Click **Save**.

3. Assign the permission set.

    a. Click **Manage Assignments** and then click **Add Assignments**.

    b. Select the users with Salesforce Platform licenses who need access to Lightning console apps, then click **Done**.

When you assign the permission set to users, Salesforce auto-assigns the Lightning Console permission set license to those users.

After you assign the permission set, make sure to add the user's profile to the Lightning console app. Go to App Manager in Setup and edit the Lightning console app.

SEE ALSO:

[Who Can Access Lightning Console Apps?](#)

Customize Your Lightning Console Pages

Use the Lightning App Builder to create custom Lightning pages to ensure that your console users always have the records they need in a layout that works best for them.

To create custom Lightning pages, head over to the Lightning App Builder. When you're done customizing your Lightning page, assign the page to your console app.

Note: In Lightning Experience, you control the appearance of your components differently than in Salesforce Classic.

- Size—The page template for your record page determines the size of the component region. For example, the three columns page template provides a main column width of 50%, and the side columns widths are each 25%. When you drag a component to a side column, its size is 25% of the screen's width. To view the available page templates, create a page in Lightning App Builder.

- Presentation—To stack components, drag components onto a page region. To use tabs, first drag the Tabs component onto the page, then drag components into the individual tabs. To group components in collapsible sections, drag the Accordion component onto the page, then add components into each section.

The following templates and components are useful in Lightning console apps.

Record Page Templates

The Three Columns template and the pinned region templates are designed with Lightning console apps in mind. They feature a main column and two sidebars with fixed proportional widths. The main column is 50%, and the side columns widths are each 25%. The minimum required resolution for these templates is 1,280 pixels. However, we recommend using a resolution of 1,440 pixels or higher.

Use the console pinned region templates to let your console users view and work with records while navigating between subtabs. You can create record pages using one of the following pinned region templates:

- Console: Pinned Header
- Console: Pinned Header and Left Sidebar
- Console: Pinned Left Sidebar
- Console: Pinned Left and Right Sidebars

Note: Pinned regions don't support theming. For example, if you use custom theming to brand your app with the color green, the pinned region doesn't apply the green color.

EDITIONS

Available in: Lightning Experience

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

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USER PERMISSIONS

To create and save Lightning pages in the Lightning App Builder
- Customize Application

To view Lightning pages in the Lightning App Builder
- View Setup and Configuration

Lightning Components

These components are useful in Lightning console apps.

Accordion

This component organizes your components into collapsible sections. You can have up to 25 sections, but we recommend no more than 10. You can put multiple components in each section and customize the heading for each section.

Community 360

This component informs console users on which Knowledge articles a customer has looked at. It also shows if the customer has filed a case. As a result, console users don't suggest articles that a customer has accessed or open duplicate cases, decreasing customer frustration and improving the support process.

Guided Action List

This component lets you guide users through multi-step actions, like call scripts, with an ordered list of default flows. When flows are opened in a console app, they launch as subtabs of the associated record. In a standard navigation app, they launch in a popup window. You can add the Guided Action List component to Lightning pages for supported objects only.

Highlights Panel

This component displays record highlights along with action buttons. Use this component to ensure that your console users can see critical information at a glance.

Knowledge

This component helps console users quickly find relevant Knowledge articles for their cases and perform basic actions, such as attaching an article to a case.

This component provides similar functionality to the Knowledge Sidebar used in Salesforce Classic consoles. To use this component, Lightning Knowledge must be enabled in your org.

Milestones

This component displays active, completed, and violated case milestones with a visual tracker. Agents can use the component to drill down into case milestone details.

This component provides similar functionality to the Case Milestone tracker in Salesforce Classic. To add this component, your org must have entitlements, an entitlement process, and milestones set up. The component supports only Case Milestones and doesn't support Object Milestones. You can add it only to case pages.

Path

This component displays a visualize representation of a business process. Use this component to guide your users through an object's life cycle. In the Service Console, you can set up a path for cases. In the Sales Console, you can set up a path for opportunities, leads, quotes, contracts, and orders.

Related List - Single

This component displays a single related list for a record, including lists from a parent record.

For example, use this component to display Activity History front-and-center on all case pages, or even display cases for a parent contact.

> 💡 **Tip:** To increase console efficiency, use this component to add the Files related list to record pages. With the Files related list, console users can drag files directly onto the related list.

Related Record

This component displays details for related records, including parent records.

Behind-the-scenes, this component uses actions to provide your console users with built-in record creation and in-line edit. Console users can update records, create records, and link records—all without leaving the page.

For example, you can configure this component to show details about an associated contact on a case, or even the details of a case's parent case.

This component provides similar functionality to the Lookup component used in Salesforce Classic consoles.

💡 **Tip:** To change the displayed fields for the Related Record component, customize the associated action in Setup. If you don't see the action or can't modify it, create a new one.

The Service Console app comes with a default page for cases that includes Case Details and Contact Details information. This information is displayed using Related Record components. The quick actions used with these components can't be modified because they're provided by default. To customize the fields, first go to Setup and create a new quick action. Then modify the quick action layout. In Lightning App Builder, update the Related Record component to specify your action.

SEE ALSO:

Lightning App Builder

Standard Lightning Page Components

Create and Configure Lightning Experience Record Pages

Set Up Community 360

Lightning Flow for Service and the Guided Action List Component

Use the Knowledge Component in the Lightning Service Console

Quick Actions and Record Types

Personalize the Navigation Bar

Customize a console app's navigation bar to suit the unique way you work. You can add and reorder items, and rename or remove items you've added.

1. To personalize your navigation items, click the pencil icon on the navigation bar dropdown menu.

EDITIONS

Available in: Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions
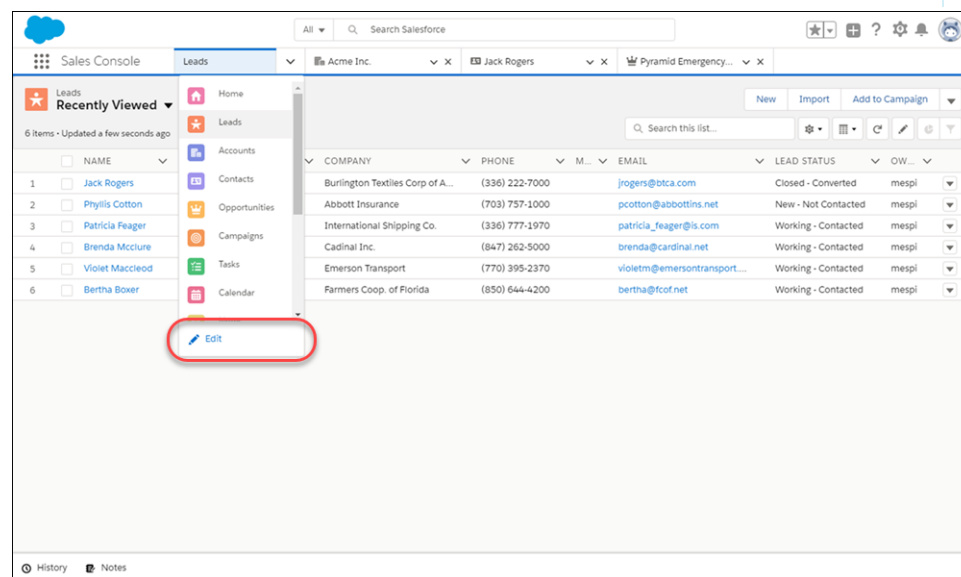
a. Reorder the items already in your navigation bar.

b. Remove items you've added. Click the "x" icon next to the item to remove. You can't remove items that your admin has specified for the app.

c. Add items to your navigation bar. Click **Add More Items**. Search through all available items in your org, and choose what to add. After you make your selections, you can reorder or remove items before saving your changes. You can't rename or remove items that your admin has specified for the app.

Customize Your Lightning Console App with Utilities

The utility bar is a great way to give your console users quick access to productivity tools, like softphones and History. It appears as a fixed footer in your Lightning console app and opens utilities in docked panels.

To add a utility bar to your Lightning console app, edit the app from the App Manager page in Setup.

When creating a utility bar for your app, keep these things in mind:

- Utility bars created using the Lightning App Wizard or in the Lightning App Builder can be assigned to only one Lightning app. However, utility bars created using the API can be assigned to multiple Lightning apps.
- The utility bar doesn't support Visualforce pages or components.
- The utility bar doesn't fully support the Chatter Publisher and Feed components.
- The History utility works in Lightning console apps only.
- The Omni-Channel utility works in the Lightning Service Console app only.

> 💡 Tip: We recommend adding no more than 10 utilities, and that you keep the utility labels short and sweet. You want your users to quickly find the tools and processes they need most.

IN THIS SECTION:

History Utility for Lightning Console Apps

The History utility lets your Lightning console users see their recently visited primary tabs and subtabs from a console utility bar.

Softphones for Lightning Console Apps

Softphone utilities let your Lightning console users make calls directly from Salesforce.

Omni-Channel Utility for Lightning Console Apps

The Omni-Channel utility lets your Lightning console users receive work requests routed through Omni-Channel.

Macros Utility for Lightning Apps

The Macros utility lets you complete repetitive tasks in a single click. You can add the Macros utility to any Lightning app, including apps with standard navigation and console navigation.

SEE ALSO:

Add a Utility Bar to Lightning Apps

History Utility for Lightning Console Apps

The History utility lets your Lightning console users see their recently visited primary tabs and subtabs from a console utility bar.

📝 **Note:** You can use the History utility only in Lightning console apps, not in Lightning apps with standard navigation. You can't change the History properties, such as the label and icon.

With the History utility, console users can see their subtabs in context of the workspace tabs they've visited (1) and copy links in one click (2). If a tab name is updated, like when a user updates a contact's name, the history list is updated, too.
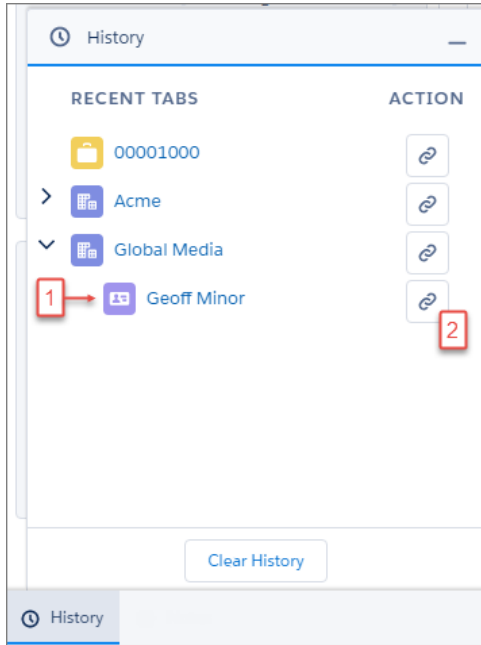
Keep these things in mind when working with the utility.

- The list can display up to 10 workspace tabs at a time, with 10 subtabs under each workspace tab.
- Workspace tabs are listed in the order last visited, with the most recent at the top. Subtabs are listed under their primary tabs in the order first opened.
- If you copy a subtab link, the record opens as a workspace tab.
- If you copy a link and want to share it with other users, make sure that they are logged in to Salesforce before opening the link. Otherwise, the link directs them to the home page instead of the specific record.

💡 **Tip:** The standard Lightning console apps, Service Console and Sales Console, include the History utility by default.

Did your console use the History component in Salesforce Classic? Well, the History utility provides the same functionality for Lightning console apps.

SEE ALSO:

Add a Utility Bar to Lightning Apps

Softphones for Lightning Console Apps

Softphone utilities let your Lightning console users make calls directly from Salesforce.

You can add softphones to your Lightning console apps that use Lightning Dialer or Open CTI. Confused about the difference? Open CTI integrates third-party CTI systems with Salesforce. Dialer provides a way to provision numbers and make calls directly from Salesforce. If you already have a telephony system in place, Open CTI is the way to go since it integrates to that existing system.

🛑 **Important:** Before you add the softphone utility to your Lightning console app, first set up and configure Open CTI or Dialer.

Here are a few things to keep in mind when adding the softphone to your Lightning console app:

- To see the Dialer option in the list of utilities, your org must have Lightning Dialer enabled.
- To ensure that console users receive incoming calls before they open the softphone utility, enable `Load in background when app opens`.

SEE ALSO:
  Set Up Lightning Dialer
  Open CTI Developer Guide: Get Started with Open CTI
  Add a Utility Bar to Lightning Apps

Omni-Channel Utility for Lightning Console Apps

The Omni-Channel utility lets your Lightning console users receive work requests routed through Omni-Channel.

📝 **Note:** You can use the Omni-Channel utility only in the Service Console app in Lightning Experience. It can't be used in Lightning apps with standard navigation.

Console users can set their presence status and accept or decline work depending on your Omni-Channel settings.

The New tab shows the number of incoming work items that agents can accept or decline. The My Work tab shows the number of work items that the agent has accepted.
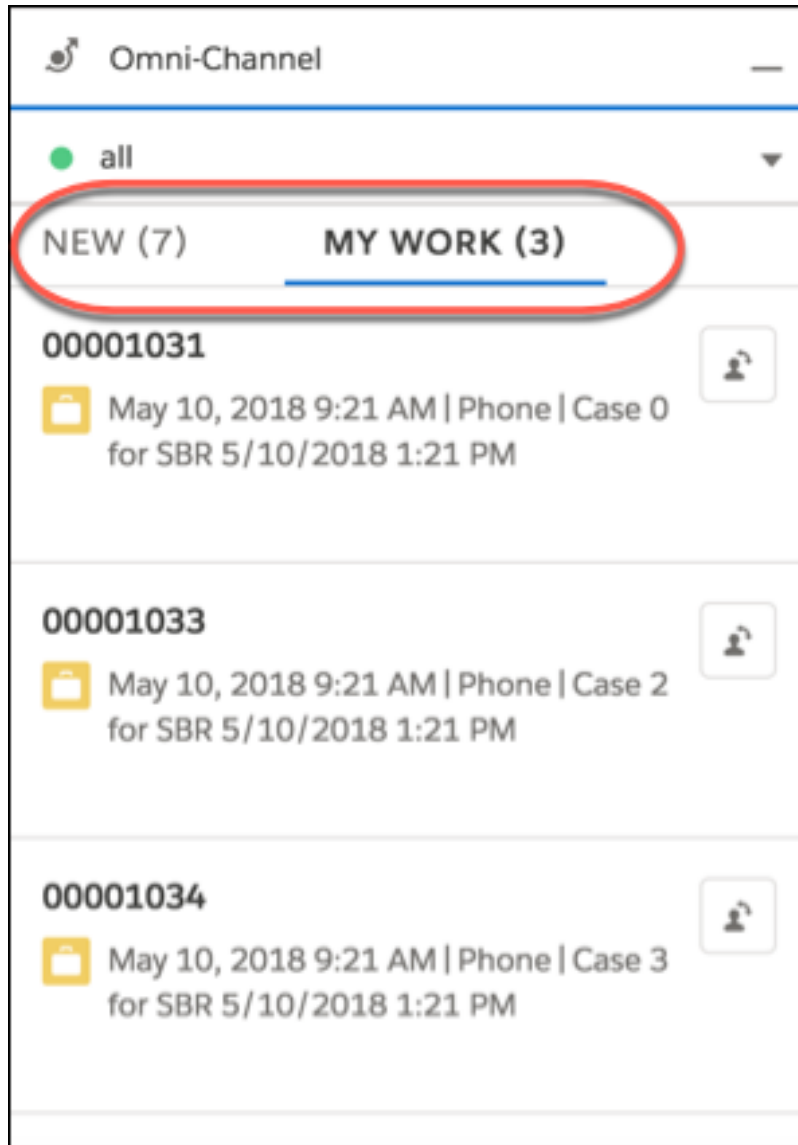
Keep these things in mind when working with the utility:

* Objects that aren't supported in Lightning Experience can't be routed using the Omni-Channel utility. SOS isn't supported in Lightning Experience, so you can't route SOS sessions using Omni-Channel.

SEE ALSO:

Set Up Routing with Omni-Channel

Add the Omni-Channel Utility to a Lightning Console App

Macros Utility for Lightning Apps

The Macros utility lets you complete repetitive tasks in a single click. You can add the Macros utility to any Lightning app, including apps with standard navigation and console navigation.

Users can create and run macros from the utility.
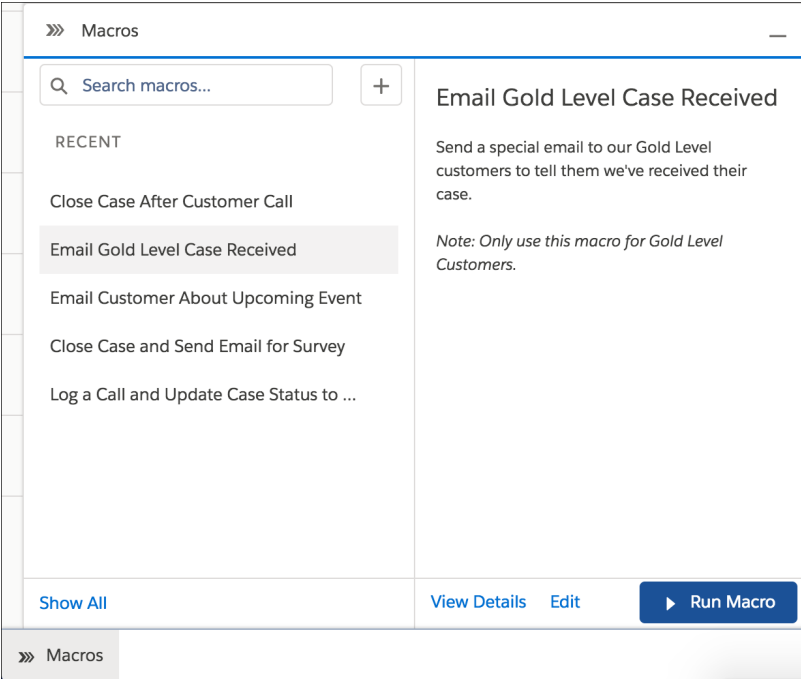
Keep these things in mind when working with the utility.

- If your org enables **Share and organize macros in folders**, the utility looks a bit different because folders are displayed.
- In Lightning Experience, macros are supported on standard and custom objects that allow quick actions and have a customizable page layout.
- Bulk macros aren't supported in Lightning Experience.

SEE ALSO:

Macros Considerations in Lightning Experience

Keyboard Shortcuts for Macros

Lightning Service Console

The Service Console is a standard Salesforce Lightning console app that meets all your service needs. You can customize this app to make it your own.

📝 **Note:** Lightning console apps don't yet have full parity with Salesforce Classic console apps. For example, some features in Salesforce Classic console apps, such as push notifications and multi-monitor support, aren't available in Lightning console apps. Learn more.

You can't upgrade Salesforce Classic console apps to Lightning Experience from Setup. To prepare for your transition to Service Cloud in Lightning Experience, watch ▶ Get Ready to Transition to Service Cloud in Lightning Experience (English only). Then customize the Salesforce-provided Service Console app in Lightning Experience. You can always recreate your Salesforce Classic console app in Lightning Experience, but using Salesforce's out-of-the-box app is faster and easier.

Walk Through It: Explore Lightning Console Apps

Here's what you get in the standard Service Console app.
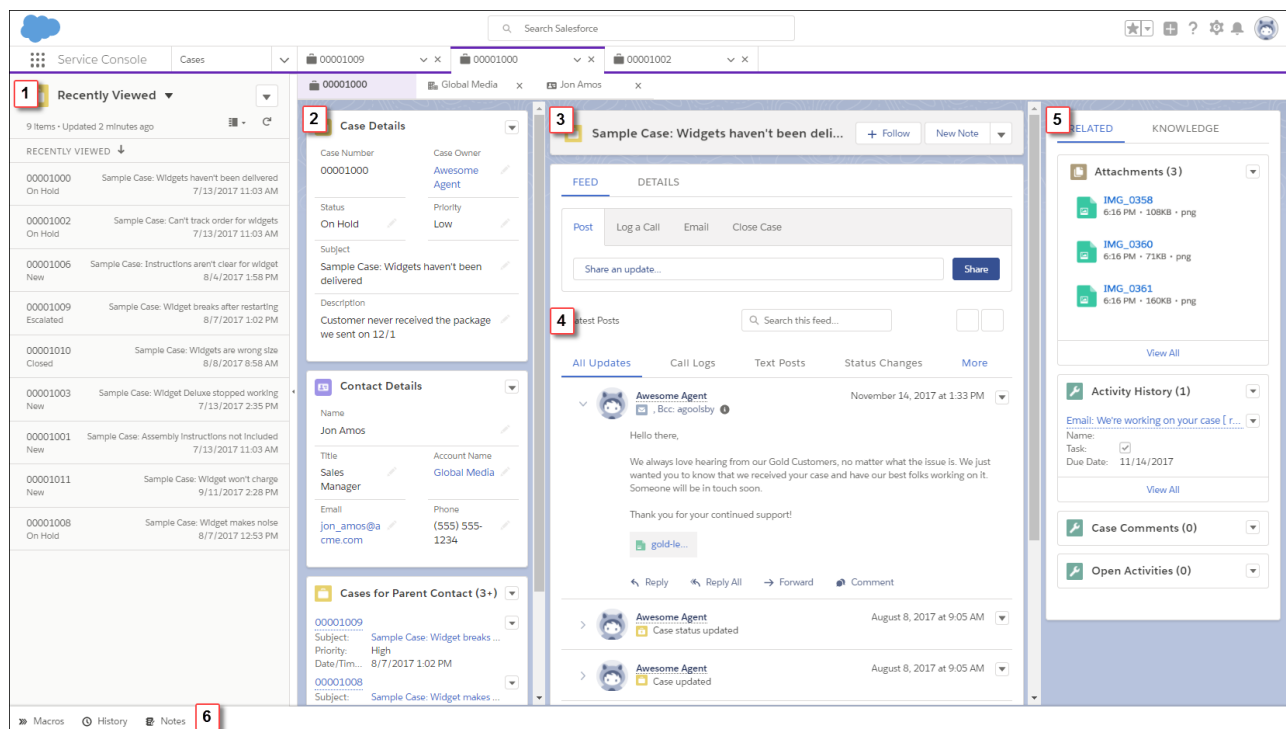
Here's how the standard Service Console app helps you out.

Manage cases faster

Split view shows a list view at the same time as workspace tabs and subtabs, letting your support agents manage multiple cases on a single screen (1).

See it all at once

A preconfigured, three-column layout puts all the important information on the same page, and minimizes clicks and scrolling.

- In the first column, case details, contact details, and related cases for the parent account are displayed using Related Record and Related List Single components (2).
- The second column includes a highlights panel that's front and center (3). The compact case feed lets you see more of your case updates (4).
- The third column includes related lists and Knowledge articles are at the ready (5).

Keep up on all the details

The preconfigured utility bar provides fast access to History and Notes (6). You can also customize the utility bar to include other tools like Macros, Omni-Channel, and the Open CTI Softphone.

> Note: For users to see and use the Notes utility, Notes must be enabled in your org. For users to see and use articles in the Knowledge component, Lightning Knowledge must be enabled in your org.

IN THIS SECTION:

Best Practices for Customizing the Lightning Service Console

You can customize the Service Console app to meet your service needs.

Lightning Flow for Service and the Guided Action List Component

Guide your users through multi-step processes with Lightning Flow for Service. Associate flows to records using Salesforce automation tools, and display those flows and their history in the Guided Action List component. When an agent opens a record that has an associated flow, the flow launches as a subtab in a console app or in a popup window for a standard navigation app. You can also use the Guided Action List to configure default flows for specific channels, like phone and chat, or other channels, like when records open from a list view or a related record. For each channel, you can specify whether flows auto-launch and also which flows you want users to complete first and last.

SEE ALSO:

Get to Know Service Setup and Install Service Features

Lightning Experience Console Limitations

Best Practices for Customizing the Lightning Service Console

You can customize the Service Console app to meet your service needs.

From the App Manager page in Setup, you can edit and customize your app basics. The only thing you can't change is the app's Developer Name. We recommend that you:

- Update the name, description, and branding for the app
- Add other items, such as quick text, macros, products, and contracts (the Service Console app includes cases, contacts, accounts, reports, dashboards, chatter, and Home by default)
- Add other utilities, such as an Open CTI softphone, Omni-Channel, Macros, and Community 360
- Assign the app to the appropriate user profiles, like your service agent profiles

  > Note: The Service Console app is automatically assigned to all standard and custom user profiles. You can modify these assignments to make sure that only the right people have access to the app.

When you're ready to customize the Lightning pages in your console, use the Lightning App Builder to create record pages.

SEE ALSO:

Lightning Flow for Service and the Guided Action List Component

Guide your users through multi-step processes with Lightning Flow for Service. Associate flows to records using Salesforce automation tools, and display those flows and their history in the Guided Action List component. When an agent opens a record that has an associated flow, the flow launches as a subtab in a console app or in a popup window for a standard navigation app. You can also use the Guided Action List to configure default flows for specific channels, like phone and chat, or other channels, like when records open from a list view or a related record. For each channel, you can specify whether flows auto-launch and also which flows you want users to complete first and last.

EDITIONS

Available in: Lightning Experience

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

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USER PERMISSIONS

To create and save Lightning pages in the Lightning App Builder:
- Customize Application

To view Lightning pages in the Lightning App Builder:
- View Setup and Configuration
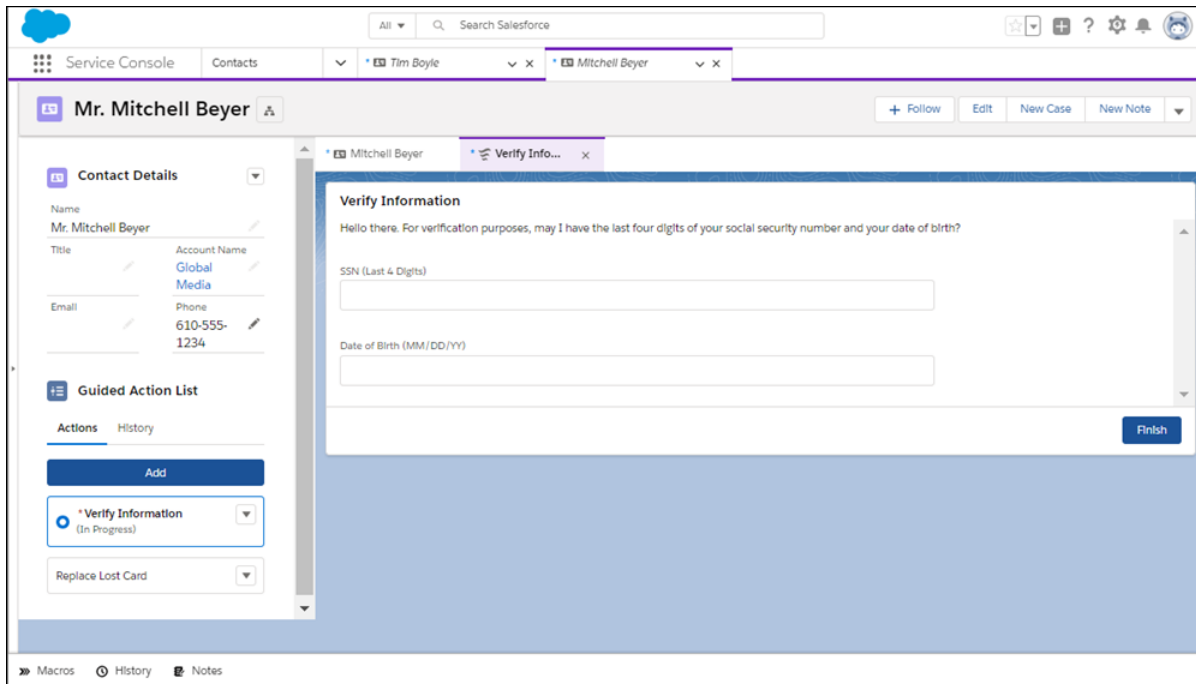
Set Up Your Flows and Processes

Before you add the Guided Action List component to a Lightning page, set up your flows and processes. The Guided Action List component displays RecordActions associated to the parent record that have new and ongoing screen flows.

You can use this component to display:

- Flows you've associated to records using a process created in Process Builder or the API
- Default flows you've associated to the record using the component's channel-specific settings
- The history of flows launched as guided actions

Note: You can add the Guided Action List component to Lightning console and standard navigation pages for supported objects only. For a list of supported objects and detailed setup information, see the *Lightning Flow for Service Developer Guide* (English only).

Configure Channel Settings

The Guided Action List provides three channels that you can customize.

- Phone

  This channel works with Open CTI. Use this channel to specify default flows for when customers call and records are shown to the agent. To use this channel, update your softphone screen pop settings for no matching records and single-matching records.

- Chat

  This channel works with Live Agent in Lightning Experience. Use this channel to specify default flows for when agents chat with customers. To use this channel, add the component to the Live Chat Transcript record page.

- Other

  Use this channel to specify default flows for when records open from list views or related records.

The Phone and Chat channels display even if you don't have these features in your org.

> 📝 **Note:** For detailed information about Open CTI and Live Agent integration, see the *Lightning Flow for Service Developer Guide*.

For each channel you can configure:

Auto-Launch
Specify whether to auto-launch the first flow in the component.

Default Actions
Select which default flows to display in the list.

> ⛔ **Important:** The flows you add in the Default Actions section are associated to the record when it's opened in context of the channel and no other RecordAction associations exist. For example, if you have a process set up in Process Builder that also associates flows to records, then the RecordActions created from the process are displayed in the component instead of the flows that you configure here.

You can also configure multiple channels for a record page. For example, if you use Open CTI, you can configure default flows for the Phone and Other channel. That way, agents can work with the Guided Action List when a caller's contact record is popped and also when they navigate to a contact record manually, like when they open a record from a list view.

The Available list only displays active screen flows (that use the type `Flow`).

The Selected list provides three regions: Top Pinned, Unpinned, and Bottom Pinned. The pinned regions let you specify flows that you want your users to complete first and last. Users can't remove the flows you add to these regions. The Unpinned region is for flows that you want your users to complete during the record's life cycle. Unlike pinned flows, users can remove these flows from the list.

Configure Guided Action Settings

When agents don't see a flow that they need in the Guided Action List, they can add it from a subset of flows that you define in Guided Action Settings. Configure the tasks that they use most often in this subset so that they can find the right step fast. If you don't define a subset of flows in this way, agents see all active screen flows in your org when they click **Add**.
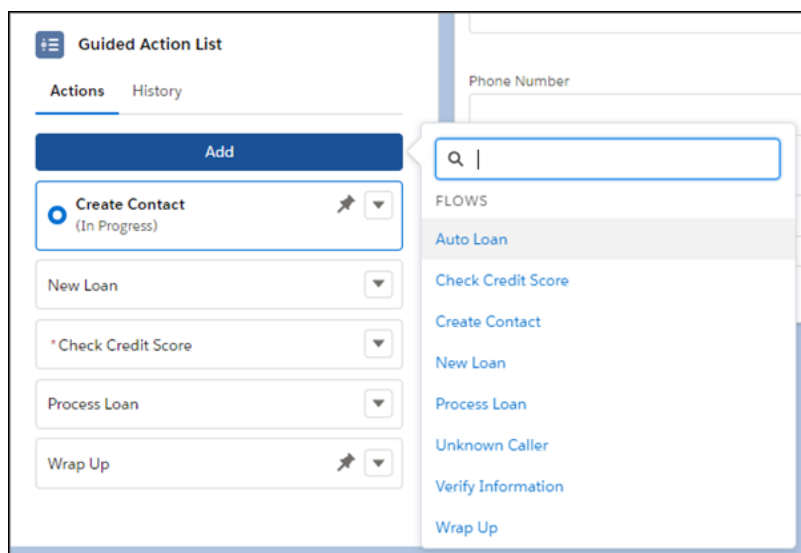
Review Your User Experience

On the Actions tab on the component, users see a Guided Action List with flows associated with the record. Depending on your channel settings, the first flow in the list is auto-launched when the user opens the record page. Keep these things in mind.

- Flows that users manually add or that get added from other processes, get added above the first flow that you specified in the Bottom Pinned region. For example, when the agent adds the Auto Loan flow, it's placed above the Wrap Up flow that's pinned at the bottom.
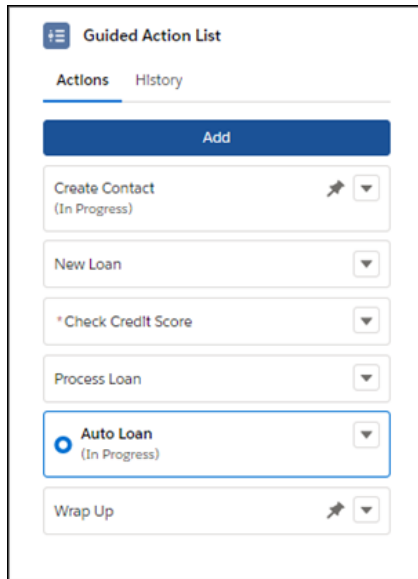
- Each flow has a dropdown menu with actions. Users can view a flow, and if the flow is unpinned, remove it from the list.
- Stages display only for in-progress flows that are in focus.
- For console apps, when flows are completed, the subtab is closed. If other subtabs are open, users are returned to the next subtab. If no other subtabs are open, users are returned to the workspace tab with the component.
- For standard navigation apps, when flows are completed, the popup window is closed.
- Completed flows are grayed out and can't be relaunched. If the page is refreshed, the completed flows are removed from the list.
- If the user tries to close a tab or popup window without completing a mandatory flow, a warning message appears. The user can choose to dismiss the reminder and complete the flow, or finish it later.

In the History tab on the component, users see the life cycle of guided actions as they go through different states on the record. This history helps agents and supervisors grasp status so that they can quickly decide what to do next. By viewing the guided action history, they can see which flows were launched, by which agents, and when each one was started, paused, resumed, and completed. For example, in a handoff or escalation, an agent or supervisor can review the history to identify gaps and determine the next step.
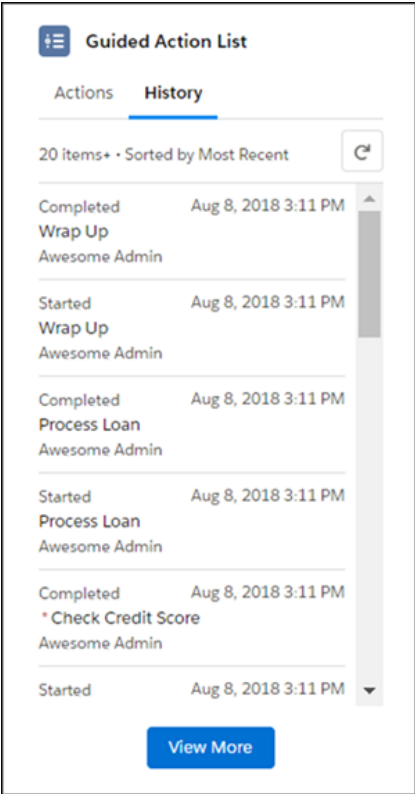
SEE ALSO:

Customize Your Lightning Console Pages

Lightning Flow for Service Developer Guide (English only)

Lightning Sales Console

The Lightning Sales Console is a standard Salesforce Lightning app that gives you all your sales tools at your fingertips to prospect leads, close deals, and manage relationships.
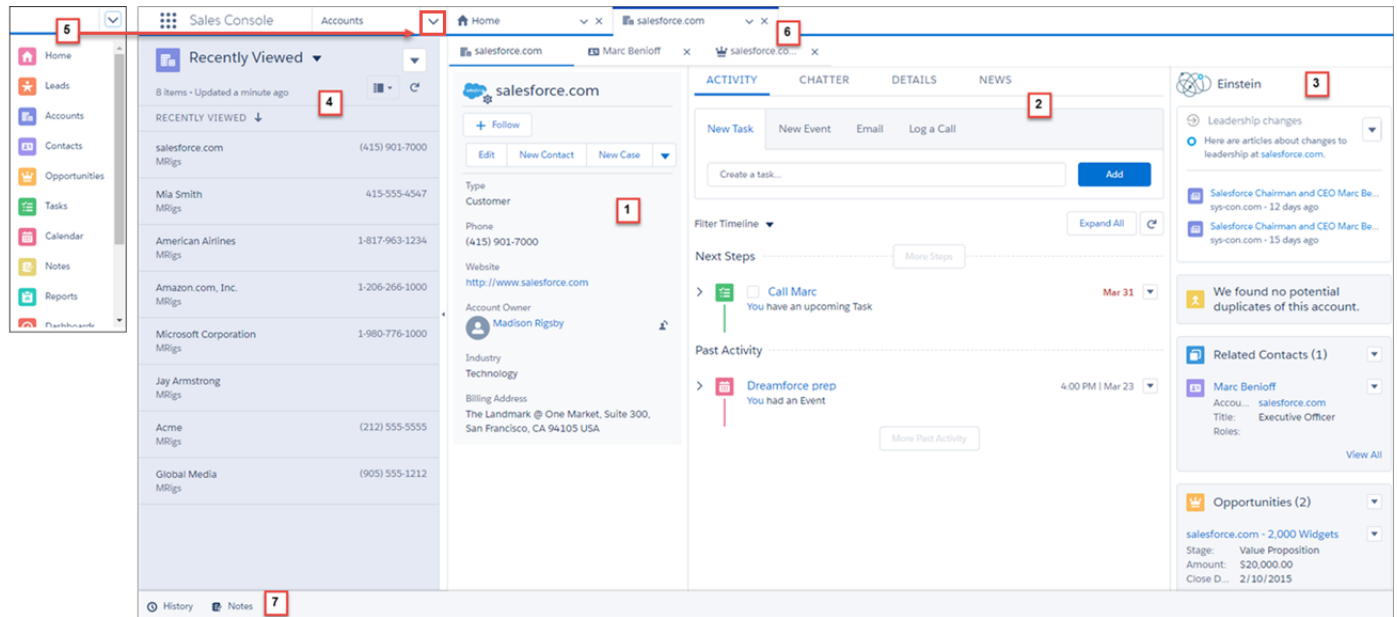
 Walk Through It: Explore Lightning Console Apps

Here's what you get in the standard Sales Console app.

- A navigation-friendly three-column layout for the objects you rely on most—accounts, contacts, leads, and opportunities. The layout includes the record's key details in the highlights panel (1), the familiar workspace (2), and useful related lists (3). To use your org's default Lightning page instead, use the Lightning App Builder to assign the preferred page to all Lightning apps.

- Split view shows a list view at the same time as your workspace tabs and subtabs, letting you work quickly through a list of records (4).

- Other go-to objects and features—including campaigns, tasks, reports, and more—are easily accessible (5).

- Intuitive tab and subtab navigation (6).

- A preconfigured utility bar with History (7). If Notes is enabled, it appears in the utility bar, too.

From Setup, admins can use the App Manager to customize the standard Sales Console app.

- Add your own branding.

- Add any additional items your teams need to access in the console.

- Configure the utility bar so reps can easily access productivity tools like Lightning Dialer and macros.

- Sales Console is automatically assigned all standard and custom user profiles. You can modify these assignments to make sure the right people have access to Sales Console.

From Setup, admins can use the Lightning App Builder to customize specific page layouts. For example, if you use Pardot, you need to add the Engagement History component to the appropriate page layouts.

> **Note:** Lightning console apps don't yet have full parity with Salesforce Classic console apps. For example, some features in Salesforce Classic console apps, such as push notifications and multi-monitor support, aren't available in Lightning console apps. Learn more.
>
> You can't upgrade Salesforce Classic console apps to Lightning Experience from Setup. To get started in Lightning Experience, customize these Salesforce-provided Lightning console apps: Service Console and Sales Console.

SEE ALSO:

Create and Edit a Custom Lightning Console App

Customize Your Lightning Console App with Utilities

Customize Your Lightning Console Pages

Lightning Experience Console Limitations

Keyboard Shortcuts for Lightning Console Apps

Use keyboard shortcuts to work efficiently in Lightning console apps. Shortcuts help you navigate and work with records faster and without using your mouse. You can use these shortcuts with your web browser shortcuts.

> **Note:**
> - You can't customize keyboard shortcuts in Lightning Experience.
> - Keyboard shortcuts aren't case-sensitive. For example, Shift+B is the same as Shift+b. If Ctrl, Alt, or Shift is part of the shortcut, the sequence of the keys doesn't matter. For example, Ctrl+Alt+A is the same as Alt+Ctrl+A.
> - For shortcuts that specify "then," release the first key, or key combo, before typing the next key. The comma isn't part of the shortcut.
> - Keyboard shortcuts are supported on U.S. and U.K. keyboards. Shortcuts that include / (forward slash) and . (period) aren't supported on other language keyboards.
> - Lightning Experience keyboard shortcuts don't work on Salesforce Classic apps viewed in Lightning Experience or in Visualforce or iFramed components.

Command	Description	Shortcut
Global		
Close or deselect	Close or deselect a window. You can't close some windows and dialogs with this shortcut.	Esc
Copy URL for active tab	Copy the URL for the tab that's in focus.	Windows: Ctrl+C, then S macOS: Cmd+C, then S

Command	Description	Shortcut
Copy URL for active workspace tab and subtabs	Copy the URL for the focused workspace tab, including its related subtabs.	Windows: Ctrl+C, then W macOS: Cmd+C, then W
Edit	Edit a record. This shortcut doesn't work with Lightning Knowledge articles, reports, dashboards, feed items, approval requests, and email messages.	E
Insert quick text	Displays the quick text browser. Use the browser to find, preview, and insert quick text.	Windows: Ctrl+. macOS: Cmd+.
Open or close History	Opens or closes the History utility.	H
Open or close Macros	Opens or closes the Macros utility.	M
Open or close Notes	Opens or closes the Notes utility. To use this shortcut, first open the utility.	N
Open or close Omni-Channel	Opens or closes the Omni-Channel utility. This shortcut works in the Service Console app only.	O
Post to feed	Submits a post or comment. You can submit posts, comments, and questions with details. This shortcut doesn't work on other publisher actions, such as emails and polls.	Windows: Ctrl+Enter macOS: Cmd+Enter
Save	Save a record. Your focus must be on a field.	Windows: Ctrl+S macOS: Cmd+S
Search	Places your cursor in the search box.	/
Show shortcut menu	Displays the available shortcuts in a modal window.	Windows: Ctrl+/ macOS: Cmd+/
Navigation		
Focus notifications	Focuses the notification panel. Press the shortcut again to focus the next notification.	C
Focus notifications (reverse order)	Focuses the notification panel. Press the shortcut again to focus the previous notification.	Shift+C
Go to composer window	Goes to the docked composer window.	G, then D
Go to item menu	Opens the item menu and places your cursor on the first item. Use the arrow keys to switch items. To open an item, press Enter.	G, then]

Command	Description	Shortcut
Go to list view	Opens the list view for the object of your workspace tab.	G, then L
Go to publisher	Takes you to the publisher. If your publisher has multiple actions, you can use the Tab and arrow keys to navigate within the publisher.	G, then P
Go to subtab	Moves the focus to the active subtab.	G, then S
Go to utility bar	Goes to the utility bar.	G, then U
Go to workspace tab	Moves the focus to the active workspace tab.	G, then W
Open item in an inactive tab	Opens the selected item in a new tab without shifting focus. ⚐ Note: Not supported for Microsoft® Internet Explorer® 11 or Microsoft® Edge.	Windows: Ctrl+Mouse Click macOS: Cmd+Mouse Click
Switch tabs	Switch between workspace tabs and subtabs. To switch, your focus must be on the tab itself.	Left Arrow or Right Arrow
Switch walkthrough focus	When the walkthrough window is displayed over the app, this shortcut lets you switch focus between the walkthrough and the app.	F6
Tabs		
Close workspace tab	Closes the current workspace tab, including its subtabs.	Shift+X
Close all tabs	Closes all unpinned tabs.	Shift+W
Refresh tab	Refreshes the current workspace tab, including its subtabs.	Shift+R

SEE ALSO:

Default Keyboard Shortcuts for a Salesforce Console in Salesforce Classic

Salesforce Console Limitations

Understand the limitations of the Salesforce Console.

IN THIS SECTION:

[Salesforce Classic Console Limitations](#)
Learn about display, access, and customization limitations for a console.

[Lightning Experience Console Limitations](#)
Learn about the limitations of the console in Lightning Experience, and which features don't yet have parity with Salesforce Classic console apps.

Salesforce Classic Console Limitations

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

Display Limitations

- Salesforce Console in Salesforce Classic 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.

- When using Live Agent in the Salesforce Classic Console, we recommend using Internet Explorer 8, 9, or 10 or the latest stable version of Firefox or Google Chrome.

- 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.

- 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 Lightning Platform 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.

- If you log in to another Salesforce app while you're logged in to a Salesforce Classic Console app, you can't accept new chat requests.

Customization Limitations

> 📝 Note: To edit a Salesforce Classic 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.
>
> You can't upgrade a Salesforce Classic console app to Lightning Experience. You can choose to display or hide the app in the Lightning Experience App Launcher, but you can't edit the app from the App Manager page in Lightning Experience Setup. To get started in Lightning Experience, customize these Salesforce-provided Lightning console apps: Service Console and Sales Console. You can also recreate your Salesforce Classic console app in Lightning Experience, but using Salesforce's out-of-the-box app is faster and easier.

- The console doesn't support Chatter Messenger.

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

- 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 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.

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

- In Chatter Answers, administrators can't customize the FAQ (Frequently Asked Questions) available to customers when they click `Need help?`.

- Joined reports aren't supported in console apps.

External Object Limitations

- External objects are available in the Salesforce Console in Salesforce Classic only. Other consoles aren't supported.

- External objects haven't been fully adapted to a console and can cause unexpected behaviors. Other objects also haven't been fully adapted to a console, but those objects are marked with an asterisk (*) in the console setup area. External objects aren't marked with asterisks.

- The external objects' associated external data sources must have the **High Data Volume** option deselected. This requirement doesn't apply to the cross-org adapter for Salesforce Connect.

SEE ALSO:

Salesforce Console in Salesforce Classic

Plan Your Salesforce Console Implementation

Supported Browsers

Lightning Experience Console Limitations

Learn about the limitations of the console in Lightning Experience, and which features don't yet have parity with Salesforce Classic console apps.

You can't upgrade a Salesforce Classic console app to Lightning Experience. You can choose to display or hide the app in the Lightning Experience App Launcher, but you can't edit the app from the App Manager page in Lightning Experience Setup. To get started in Lightning Experience, customize these Salesforce-provided Lightning console apps: Service Console and Sales Console. You can also recreate your Salesforce Classic console app in Lightning Experience, but using Salesforce's out-of-the-box app is faster and easier.

Lightning console apps don't yet have full parity with Salesforce Classic console apps. For example, some features in Salesforce Classic console apps, such as push notifications and multi-monitor support, aren't available in Lightning console apps. Learn more.

EDITIONS

Available in: Lightning Experience

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

Lightning console apps are available for an extra cost to users with Salesforce Platform user licenses for certain products. Some restrictions apply. For pricing details, contact your Salesforce account executive.

Internet Explorer 11

You can access Lightning console apps in IE11, but expect significant performance issues. We recommend using a different browser. Keep in mind that support for IE11 ends on December 16, 2017, unless you opt in to extend support. If you opt in to Extended Support for IE11, you can continue to use IE11 to access Lightning Experience until December 31, 2020.

Lightning Console JavaScript API

This API provides methods for Lightning console apps similar to methods provided by the Salesforce Console Integration Toolkit. Not all the methods available in the Salesforce Console Integration Toolkit are available in the Lightning Console JavaScript API. This table lists the Salesforce Console Integration Toolkit methods that you can use in Lightning Console JavaScript API starting with API version 42.0.

Visualforce

Visualforce is available in Lightning console apps as beta, which means it's a high-quality feature with known limitations. Lightning console apps' Visualforce support includes:

- Lightning pages containing Visualforce Lightning components

- Visualforce mass actions

- Custom tabs that display a Visualforce page
- Opening Visualforce pages as new workspace tabs or subtabs using the openTab() and openSubtab() JS APIs
- Visualforce overrides for new, edit, view, tab, list, and clone actions.

Lightning console apps don't currently support:

- Visualforce overrides for delete and custom actions
- Visualforce pages in the utility bar
- Visualforce buttons and links

Person Accounts

Person accounts don't have the same three-column layout as business accounts. Use the Lightning App Builder to create the desired layout, and then assign it to appropriate console app and the person account record type.

Person account records that display in contact Related Record components are read-only.

Salesforce Knowledge

Some Knowledge component actions don't work in Lightning console apps, including attaching PDF files, adding article contents to case emails, and adding article community URLs. The Knowledge footer is not supported in Lightning Experience.

SEE ALSO:

Plan Your Salesforce Console Implementation

What Features Are Available in Lightning Console Apps?

Supported Browsers

openTab() for Lightning Experience

openSubtab() for Lightning Experience

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