Chat for Support Supervisors

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CHAT FOR SUPPORT SUPERVISORS (SALESFORCE CLASSIC)

Welcome to Chat for support supervisors! Chat makes it easy for your agents to support customers. With Chat's supervisor tools, you can easily monitor your agents' activities, assist your agents in chats, and view data on your agents' chat sessions. This information applies only to Chat in Salesforce Classic.

Available in: Salesforce Classic

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

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

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

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

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

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

Report on Chat Sessions
Gain insight into your agents' chat activities by building reports about Chat sessions.

SEE ALSO:
Chat for Support Agents (Salesforce Classic)
Chat for Administrators
Permissions for Chat Support Supervisors

The Chat Supervisor Panel for Salesforce Classic

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

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Access the Supervisor Panel

Access the supervisor panel conveniently from the Salesforce console to easily monitor your agents' chat activity.

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USER PERMISSIONS

To use the Chat supervisor panel in the Salesforce console:

- Access to the Chat supervisor tab in a user profile or permission set, and included in a Salesforce console app

To access the supervisor panel in the Salesforce console, select **Chat Supervisor** in the console's navigation list.

The supervisor panel appears in the main console window, giving you access to real-time information about your Salesforce org's chat buttons and agents.

Agent Status List

The agent status list in the supervisor panel gives you access to real-time information about your agents' chat activity.

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Agent Detail	Description
Agent Name	The name of the agent. ✏️ Note: If a red flag appears next to the name, the agent has requested help. Respond via the chat detail module (far right).
Status	The agent's Chat status.
Action	The actions you can take to change the agent's status.
No. Chats in Progress	The number of chats that an agent is engaged in.
No. Requests Assigned	The number of pending chat requests that are currently assigned to the agent.
Time Elapsed Since Login	The amount of time the agent has been logged in to Chat.
Time Elapsed Since Last Accept	The amount of time since the agent last accepted a chat request.
Message to Supervisor (optional)	The private message that the agent sent with a help flag.

Expand each agent's name to see details about the customers they're chatting with.

Customer Detail	Description
Visitor Name	The name of the customer, if available.
IP	The IP address of the customer's device.
Network	The customer's network, if available.
Browser	The type of internet browser the customer is using to connect to their chat window.
City	The city the customer is chatting from.
Country	The country the customer is chatting from.
Duration	The amount of time the customer has been engaged in a chat with the agent.
Action	The actions you can take to view the customer's chat with the agent.

SEE ALSO:

Chat Statuses

Queue Status List

The queue status list in the supervisor panel gives you access to real-time information about your organization's chat buttons and queues.

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Queue Detail	Description
Button Name	The name of the chat button.
ID	The unique Salesforce ID of the chat button.
Queue Length	The number of chats that are waiting to be assigned to an agent.
Longest Wait	The longest amount of time a customer chat has waited to be connected to an agent.

Monitor Your Agents' Chats

View your agents' chats from the supervisor panel as they help customers. You can monitor agents' performance and give them real-time feedback and help as they serve customers.

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1. In the Agent Status list, click ⊞ to expand the information about the agent whose chat you want to view. If an agent has requested help, you see a red flag next to the name and a private message (far right) if the agent entered one.

2. To view a chat, click **View** in the Action column of the chat you want to monitor.

   The chat monitor opens in the Agent Status list.

3. To send a private message to an agent as the agent is chatting with a customer, type your message in the message field and press **Enter**.

   The agent can see your message in the chat log, but the message is invisible to the customer.

When you finish monitoring your agent's chat, click ⊞ again to collapse the chat monitor.

To remove a flag after you've provided help, click **Lower Flag**.

SEE ALSO:

　Agent Status List

Assign Skills to Agents

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

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1. In Setup, enter *Skills* in the `Quick Find` box, then select **Skills**.

2. Click the name of the skill you want to assign.

3. Click **Edit**.

4. Select either the profiles (recommended) or individual users who have this skill.

5. Click **Save**.

📝 Note: Skills are visible to all users, but only your administrator can create skills.

Report on Chat Sessions

Gain insight into your agents' chat activities by building reports about Chat sessions.

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You can create a custom report type for Chat sessions and use it to run reports on your agents' sessions using the Report Builder. These Chat session reports can provide insight about your agents' chat activities—for example, whether or not your agent team is able to handle all chat requests from your customers.

1. Create a custom report type using Chat Sessions as the primary object.

2. Create a new Chat report using the Report Builder in Salesforce Classic or the Reports tab in Lightning Experience.

3. Customize your report to include the columns of information you want to feature.

4. Save or run the report.

SEE ALSO:

Create a Report
Build a Report in Salesforce Classic
Chat Session Records

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