



Chat for Support Agents

Salesforce, Spring '20



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CHAT FOR SUPPORT AGENTS

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

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

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

[Assist Customers with Chat](#)

Use Chat to quickly help your customers solve issues.

[Transfer Chats to an Agent, Skill, or Button](#)

Chats can be transferred to another agent, skill, or button so your customers always receive the highest-quality help from the most relevant sources. This information applies to chats routed with Live Agent routing only.

[View Customer Records in the Salesforce Console](#)

Salesforce automatically creates some records when a chat ends. These records store information about chat customers and their interactions with agents. View these records in the console in Salesforce Classic.

SEE ALSO:

[Chat for Support Supervisors \(Salesforce Classic\)](#)

[Permissions for Chat Support Agents](#)

EDITIONS

Available in: **Salesforce Classic** and **Lightning Experience**

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

Available in: **Essentials, Unlimited,** and **Enterprise Editions** with Service Cloud or Sales Cloud

USER PERMISSIONS

To chat with visitors in the Salesforce console:

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

Assist Customers with Chat

Use Chat to quickly help your customers solve issues.

Using Chat in the Salesforce console gives you access to several other Service Cloud products that let you assist customers in a comprehensive way.

[Change Your Chat Status](#)

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

[Chat with Customers](#)

Accept incoming chat requests to begin chatting with customers in a Salesforce console app.

[Access Customer Details During a Chat](#)

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

[Send Quick Text Messages in Chats](#)

Send chat customers predefined messages to respond more quickly. You can create quick text for greetings, notes, answers to common questions, and more.

[Transfer Files During a Chat](#)

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

[Attach Articles to Chats](#)

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

[Attach Records to Chat Transcripts](#)

Search for or create records to attach to a chat transcript as you chat with customers in a Salesforce console app.

[Block Unwanted Chat Customers](#)

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

[End a Chat Session](#)

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

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USER PERMISSIONS

To chat with visitors in the Salesforce console:

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Change Your Chat Status

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

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

1. Click the Chat footer or Omni-Channel window to open the chat monitor.
2. Click the drop-down arrow in the upper right corner of the chat monitor to view your status options.
3. Select your status.

Chat Statuses

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

Chat Statuses

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

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

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USER PERMISSIONS

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EDITIONS

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Chat with Customers

Accept incoming chat requests to begin chatting with customers in a Salesforce console app.

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

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

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

SEE ALSO:

[Send Quick Text Messages in Chats](#)

[Attach Articles to Chats](#)

[Transfer Chats](#)


[Transfer Files During a Chat](#)

[Attach Records to Chat Transcripts](#)

[End a Chat Session](#)

Access Customer Details During a Chat

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

- To search for a record, type a name in the relevant box in the Related Entities section of the page, then click . To associate a record you find to the chat, select it from the search results list and click **Save**.
In older organizations, you could access records and visitor details from the Related Entities panel during chats. However, starting with Summer '14, the Related Entities panel in the details tab isn't available for new Chat customers. Existing customers will continue to have access to the Related Entities panel.
- Once you associate an existing record to the chat, click the name of the record to open it in a new tab.
- To create a new record, click **New Case**, **New Lead**, **New Contact**, or **New Account**.

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Available in: **Essentials**, **Unlimited**, and **Enterprise Editions** with Service Cloud or Sales Cloud

USER PERMISSIONS

To chat with visitors in the Salesforce console:

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

EDITIONS


Available in: **Salesforce Classic** and **Lightning Experience**

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

Available in: **Essentials**, **Unlimited**, and **Enterprise Editions** with Service Cloud or Sales Cloud

Send Quick Text Messages in Chats

Send chat customers predefined messages to respond more quickly. You can create quick text for greetings, notes, answers to common questions, and more.

 **Note:** If you don't have access to quick text, contact your Salesforce admin.

1. While chatting with a customer, open the quick text browser.
 - In Salesforce Classic, on Mac OS or Windows, type `;/` in the message field.
 - In Lightning Experience, type one of the following commands in the message field.

Mac OS: `Cmd+`.

Windows: `Ctrl+`.

A list of quick text messages displays. Recently used messages display first.
2. To see additional quick text messages, type a word or phrase.

A list of messages that include those words appears.
3. To see the title and full text of a message, hover over it or highlight it using the arrow keys on your keyboard.

The full message displays in the preview panel.
4. To select a message and add it to your chat, click it or use your keyboard to highlight it and then press Enter.
5. To send the message, click **Send** or press Enter on your keyboard.

SEE ALSO:

[Create Quick Text Messages](#)

EDITIONS

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

Available in: **Essentials**, **Unlimited**, and **Enterprise** Editions with Service Cloud or Sales Cloud

USER PERMISSIONS

To access quick text while chatting with visitors:

- Read on Quick Text




Transfer Files During a Chat

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

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

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

The file size can't exceed 5 MB.

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

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USER PERMISSIONS

To use the Salesforce console:

- Chat is enabled and set up
- AND
- Chat is set up in a Salesforce console app


To transfer a file during a chat:




- Edit on the object

Attach Articles to Chats

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

The Knowledge One widget is only available if your Salesforce org uses Salesforce Knowledge and your Salesforce admin has included the tool in your Salesforce app.

 **Note:** Attaching articles to a chat using the **Share** button is supported only in Salesforce Classic.

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

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

SEE ALSO:

[Set Up Chat Answers from Knowledge Articles](#)

EDITIONS

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 Service Cloud

USER PERMISSIONS






To search for and view an article:

- Read on the article type

Attach Records to Chat Transcripts

Search for or create records to attach to a chat transcript as you chat with customers in a Salesforce console app.

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

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

SEE ALSO:

[Chat Transcripts](#)

EDITIONS

Available in: **Salesforce Classic** and **Lightning Experience**

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

Available in: **Essentials, Unlimited, and Enterprise Editions** with Service Cloud or Sales Cloud

USER PERMISSIONS

To search for and view a record:

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

To create a new record:

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

To edit a record:

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

To delete a record:


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

Block Unwanted Chat Customers


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

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

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

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

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

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

End a Chat Session

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

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

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

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Available in: **Essentials, Unlimited, and Enterprise Editions** with Service Cloud or Sales Cloud

USER PERMISSIONS

To chat with visitors in Chat in the Salesforce console:

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

EDITIONS

Available in: **Salesforce Classic** and **Lightning Experience**

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

Available in: **Essentials, Unlimited, and Enterprise Editions** with Service Cloud or Sales Cloud

USER PERMISSIONS

To chat with visitors in the Salesforce console:

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

Transfer Chats to an Agent, Skill, or Button

Chats can be transferred to another agent, skill, or button so your customers always receive the highest-quality help from the most relevant sources. This information applies to chats routed with Live Agent routing only.

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

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

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

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

If an agent selects **User = All Users with Skill**, then the chat transfer request is broadcast to all agents who are available who have that skill. As a result, multiple agents can hear the incoming chat notification for a few seconds. If an agent immediately accepts the chat transfer or has auto-accept enabled, the request is no longer shown to the other agents but the agents might continue to hear the notification sound for a few seconds.

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

EDITIONS

Available in: **Salesforce Classic**

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

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

When an agent accepts a transferred chat, only the chat is transferred to the agent. Ownership of related records, such as a case, aren't transferred to the agent.



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

Transfer Chats

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

Send a Chat Conferencing Request

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

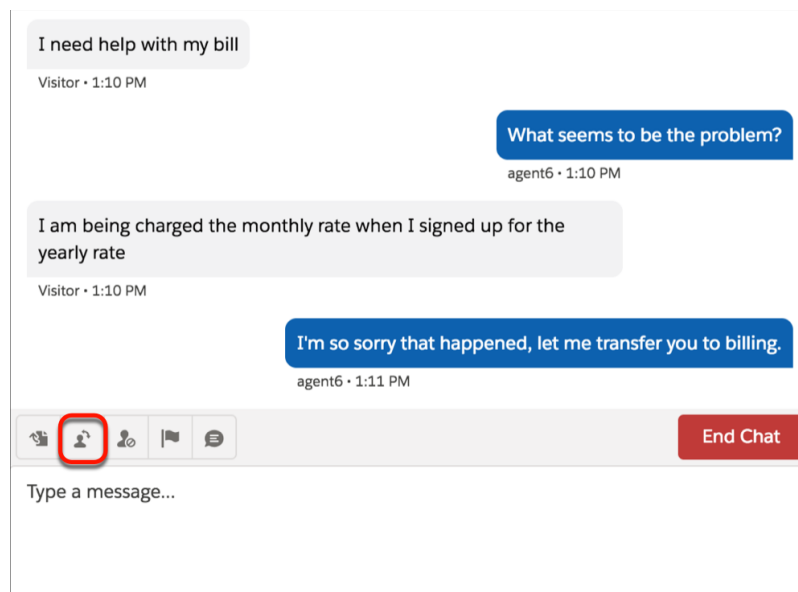
Request Help with a Chat

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

Transfer Chats

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

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



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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

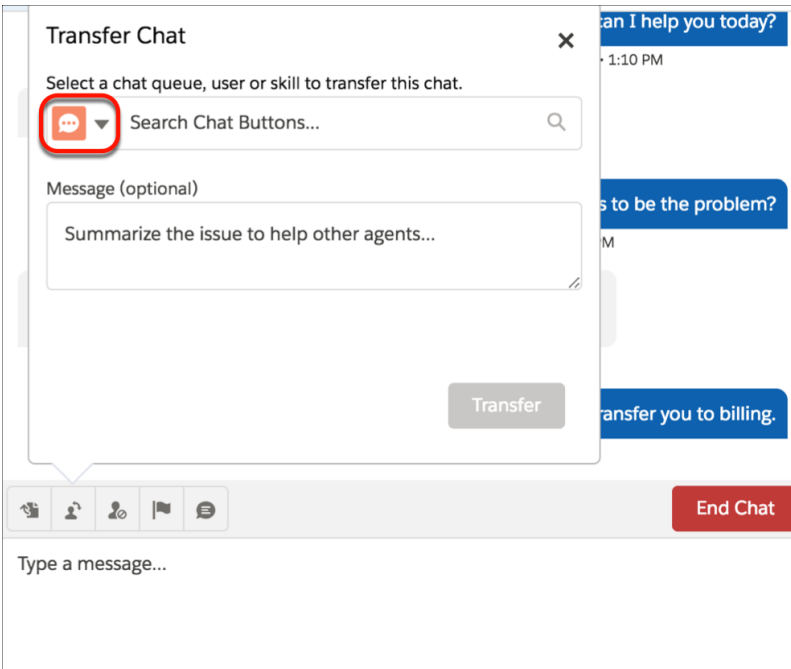
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USER PERMISSIONS

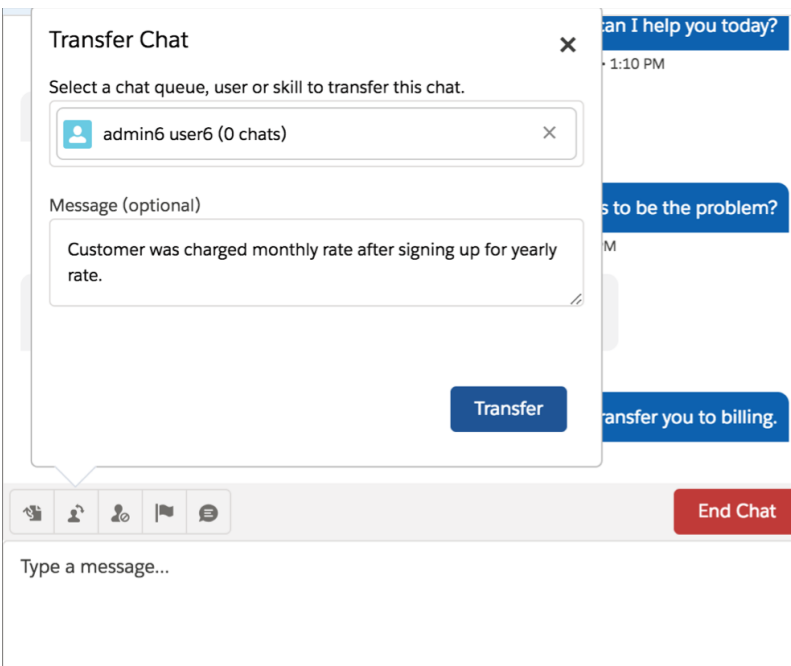
To chat with visitors in the Salesforce console:

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



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


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




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

Send a Chat Conferencing Request

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

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

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

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

5. If you decide to exit the conference, click **Leave Conversation**.

When the other agents leave the conference, agents see a notification in the chat log. The last agent in the conference must click **End Conversation**.

When an agent joins a conference, older chats are loaded. Grey lines appear while they are loading.

When an agent doesn't have access to other conversations with the customer, the agent sees a warning message indicating that some conversations are not viewable due to permissions.

Any saved and attached records open for other agents who join the conference and have the appropriate permissions. Only the originating or longest-attending agent can attach other records. If the longest-attending agent attaches or removes records during the conference, other agents don't see these changes in their workspaces. For more about transferring chats and workspaces, see [Transfer Chats](#).

If you use Omni-Channel routing, chat conferencing is available in Lightning Experience only. To conference in Salesforce Classic, use Live Agent routing.

EDITIONS

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USER PERMISSIONS

To create and edit configurations:


- Customize Application

To enable chat conferencing:


- Enable Chat Conference

Request Help with a Chat

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

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

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

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

EDITIONS

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Available in: **Essentials**, **Unlimited**, and **Enterprise** Editions with Service Cloud or Sales Cloud

View Customer Records in the Salesforce Console

Salesforce automatically creates some records when a chat ends. These records store information about chat customers and their interactions with agents. View these records in the console in Salesforce Classic.

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

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

There are a few different types of records you can view in the Salesforce console. Read on to learn more about them.

Chat Session Records

Every time your agents log in to Chat, a Chat session record is automatically created. These session records store information about your agents' and customers' interactions online, such as how many chat requests were processed, how long agents spent online, or how long agents were actively engaged in chats with customers.

Chat Visitor Records

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

Chat Transcripts

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view customer records:

- Read on the record type

For agents to use Chat:



- API Enabled administrative permission

Chat Session Records

Every time your agents log in to Chat, a Chat session record is automatically created. These session records store information about your agents' and customers' interactions online, such as how many chat requests were processed, how long agents spent online, or how long agents were actively engaged in chats with customers.

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


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

-  **Note:** If you have the correct permissions, you can create, view, edit, or delete session records, just like other record types in Salesforce. However, session records are meant to provide a paper trail for the chats between your agents and customers, so we don't recommend tampering with these records in most cases.
-  **Important:** Chat session records don't include chats routed with Omni-Channel. Information about chats routed with Omni-Channel can be found in [Agent Work records](#).

Chat Visitor Records

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

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

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

SEE ALSO:

- [Create and Update Records](#)
- [Delete Records](#)
- [Update Records](#)

EDITIONS

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 Service Cloud

Chat Transcripts

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

When a chat ends successfully—that is, when the chat is ended by a customer or an agent—the chat transcript is created as soon as the agent closes the chat window and any related tabs. When you're using Omni-Channel routing, the chat transcript is created when the chat's requested by a visitor.

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

 **Note:** If you have the correct permissions, you can create, view, edit, or delete chat transcripts, just like other record types in Salesforce. However, chat transcripts are meant to provide a paper trail for the chats between your agents and customers, so we don't recommend tampering with these records in most cases. With Live Agent routing, it can take up to 30 minutes to create the transcript if a chat is disconnected or experiences another error.

[Chat Transcript Fields](#)

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

[Chat Transcript Events](#)

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

SEE ALSO:

[Create and Update Records](#)

[Delete Records](#)

[Update Records](#)

Chat Transcript Fields

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

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

Field	Definition
Abandoned After	The amount of time in seconds before the unanswered chat request was disconnected
Account Name	The name of the account associated with the transcript
Agent Average Response Time	The average time that it took an agent to respond to a chat visitor's message
Agent Maximum Response Time	The maximum time it took an agent to respond to a chat visitor's message

EDITIONS

Available in: **Salesforce Classic and Lightning Experience**

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

Available in: **Essentials, Unlimited, and Enterprise Editions** with Service Cloud or Sales Cloud

EDITIONS

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Field	Definition
Agent Message Count	The number of messages an agent sent during the chat
Agent Skill	The skill associated with the live chat button used to initiate the chat
Body	The transcribed chat between an agent and a visitor
Browser	The type and version of the browser used by the visitor
Browser Language	The visitor's browser language selection
Case	The case associated with the chat
Chat Button	The chat button that the visitor clicked to initiate the chat
Chat Duration	The total duration of the chat in seconds
Contact Name	The name of the contact that participated in the chat Note that contacts and visitors are not the same. See Live Chat Visitor for more information.
Created By	The user who created the transcript, including creation date and time (Read only)
Created Date	The date and time the transcript was created (Read only)
Deployment	The deployment from which the visitor initiated the chat
End Time	The time the chat ended
Ended By	Indicates whether the visitor or the agent ended the chat
Last Modified By	The user who last modified the transcript, including date and time (Read only)
Last Modified Date	The date and time the transcript was last modified (Read only)
Lead	The name of the lead that was generated by the chat or discussed during the chat
Live Chat Transcript	Unique, numerical identifier automatically assigned to the transcript. Administrators can modify the format and numbering for this field. Transcript numbers usually increase sequentially, but sometimes they can skip numbers in a sequence.
Live Chat Visitor	Unique, numerical identifier automatically assigned to the visitor. Administrators can modify the format and numbering for this field. Visitor numbers usually increase sequentially, but sometimes they can skip numbers in a sequence.

Field	Definition
	Note that visitors and contacts are different: a visitor might be a contact, but this is not a requirement, and there is no relationship between contacts and visitors.
Location	The visitor's geographic location. Either the city and state, or city and country (if the visitor is located outside of the United States).
Network	The visitor's network or Internet Service Provider.
Owner	The name of the transcript owner. By default, the owner is the user who originally created the transcript (for example, the agent who answered the chat). You can select a different user as the owner, or assign the transcript to a queue. When assigning transcripts to other users, make sure those users have the "Read" permission on live chat transcripts.
Platform	The user's operating system
Primary Skill	Primary Skill is not used for chat and can be empty.
Referring Site	Site the visitor was on before they came to your website. For example, if the visitor used Google to search for your support organization's website, the referring site is Google.
Request Time	The time that the visitor initially requested the chat
Screen Resolution	The screen resolution used by the visitor
Start Time	The time that the agent answered the chat request
Status	Completed or Missed. A missed chat was requested but not answered
Supervisor Transcript Body	Contains the whisper messages from supervisors
User Agent	A string that identifies the type of browser and operating system the visitor used
Visitor Average Response Time	The average time that it took a visitor to respond to an agent comment
Visitor Maximum Response Time	The maximum time it took a customer to respond to an agent's message
Visitor IP Address	The IP address of the computer that the visitor used during the chat
Visitor Message Count	The number of messages a visitor sent during the chat
Wait Time	The total amount of time a chat request was waiting to be accepted by an agent

Chat Transcript Events

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

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

Event	Description
Chat Requested	Visitor requested a chat
Queued	Chat request was placed in queue
Routed (Push)	Chat request was routed to agent
Routed (Choice)	Chat request was routed to all available, qualified agents
Accepted	Chat request was accepted by agent
Critical Wait Alert Time Reached	Agent failed to respond to the customer's message before reaching the critical wait alert time
Critical Wait Alert Cleared	Agent responded to the customer's message after the critical wait alert was received
Transfer Requested	Agent requested chat transfer
Transfer Accepted	Chat transfer was accepted by agent
Transfer Request Canceled	Chat transfer request was canceled by the agent who sent the request
Transfer Request Declined	Chat transfer request was declined by the agent who received the request
Transferred to Button	Chat was transferred to a button
Transfer to Button Failed	Chat transfer to button was unsuccessful
Chat Conference Requested	Agent sent a request to start a conference
Chat Conference Canceled	Conference request was canceled
Chat Conference Declined	Conference request was declined by an agent
Agent Joined Conference	An agent joined the conference
Agent Left Conference	An agent left the conference
File Transfer Requested	A file transfer was requested
File Transfer Canceled by Agent	File transfer was canceled by an agent

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Event	Description
File Transfer Canceled by Visitor	File transfer was canceled by the visitor
File Transfer Succeeded	File transfer was successful
File Transfer Failed	File transfer failed
Canceled (Blocked)	An attempted chat was blocked via an IP blocking rule
Blocked by Agent	An agent blocked an active chat (creating an IP blocking rule)
Declined (Manual)	Chat request was declined by agent
Declined (Time-Out)	Chat request timed out while assigned to agent
Canceled (No Agent)	Chat request was canceled because no qualified agents were available
Canceled (No Queue)	Chat request was canceled because there was no room in queue
Canceled by Visitor	Visitor clicked Cancel Chat
Agent Left	Agent left chat
Visitor Left	Visitor left chat
Ended by Agent	Agent clicked End Chat
Ended by Visitor	Visitor clicked End Chat
Other	Another event occurred

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