Chat for Administrators

Salesforce, Winter '27

Last updated: July 22, 2026

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CREATE A BASIC CHAT IMPLEMENTATION

Before you customize Chat, you need to create the basic Chat implementation for your Salesforce org. After you complete the basic setup steps, you'll have a functioning Chat implementation that your agents can use to chat with customers.

Important: The legacy chat product is scheduled for retirement on February 14, 2026, and is in maintenance mode until then. During this phase, you can continue to use chat, but we no longer recommend that you implement new chat channels. To avoid service interruptions to your customers, migrate to Messaging for In-App and Web before that date. Messaging offers many of the chat features that you love plus asynchronous conversations that can be picked back up at any time. Learn about chat retirement in Help.

1. Enable Chat

   Get started with Chat by enabling it for your Salesforce org. After you enable Chat, you can customize it.

2. Create Chat Users

   Before your users can assist customers with chat, you need to assign the users as Chat users. Chat users are support agents and supervisors who have the Salesforce permissions to assist customers with chat.

3. Create and Assign Chat Skills

   Skills identify your agents' areas of expertise. When you assign an agent to a skill, that agent receives chat requests that are related to the agent's skill areas. You can also enable your supervisors to assign skills to agents. This information applies to Live Agent routing for chats only.

4. Create Chat Agent Configurations

   Chat agent configurations define the functionality that's available to your agents and support supervisors. Create configurations to give different capabilities to multiple types of users,

5. Create Chat Deployments

   A deployment is a place on your company's website that's enabled for Chat. Create deployments to implement Chat and control its functionality on your website.

6. Create Chat Buttons

   Create chat buttons to enable customers to request a chat with an agent directly from your website.

7. Customize Your Chat Branding with Salesforce Sites

   To customize your Chat implementation with images, use a Salesforce Site to upload the images for your chat window and chat buttons.

SEE ALSO:

Customize Your Chat Implementation

Add Chat to the Salesforce Console

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 set up Chat:

- Customize Application

To create user profiles and permission sets:

- Manage Profiles and Permission Sets

Enable Chat

Get started with Chat by enabling it for your Salesforce org. After you enable Chat, you can customize it.

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1. From Setup, enter *Chat Settings* in the Quick Find box, then select **Chat Settings**.
2. Select `Enable Chat`.
3. Click **Save**.

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

USER PERMISSIONS

To enable Chat:

- Customize Application

Create Chat Users

Before your users can assist customers with chat, you need to assign the users as Chat users. Chat users are support agents and supervisors who have the Salesforce permissions to assist customers with chat.

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All Chat users need the `API Enabled` administrative permission enabled on their associated profile before they can use Chat.

1. From Setup, enter *`Users`* in the Quick Find box, then select **Users**.
2. Click **Edit** next to a user's name.
3. Select `Chat User`. If you don't see this checkbox, verify that your support organization has purchased enough Chat feature licenses.
4. Click **Save**.

After creating users, make sure that you assign them a Chat configuration and associate them with the appropriate skills.

Permissions for Chat Support Agents

Enable a few specific permissions for Chat support agents so that they have access to the tools that they need to provide help to customers.

Permissions for Chat Support Supervisors

You must enable certain permissions for Chat support supervisors so that they have all the tools they need to monitor agents' activities and review customers' information.

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USER PERMISSIONS

To create or edit users:
- Manage Internal Users

To enable agents to use Chat:
- API Enabled administrative permission

SEE ALSO:

Create Chat Agent Configurations

Profiles

Create and Assign Chat Skills

Permissions for Chat Support Agents

Enable a few specific permissions for Chat support agents so that they have access to the tools that they need to provide help to customers.

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General Permissions

Necessary Permission	Description
"API Enabled"	Required for all Chat users

Object Permissions

Record Type	Permission	Description	Considerations
Chat Sessions	"Read"	Enables agents to view session records	We don't recommend giving agents the ability to create, edit, and delete session records. Session records are created automatically and are meant to provide a paper trail with information about the time that agents spend online, so we don't recommend giving agents the ability to change these records.
Chat Configurations	"Read"	Enables agents to use configuration settings, such as sensitive data rules.	We don't recommend giving agents the ability to create, edit, and delete chat configuration records. Without the "Read" permission on chat configurations, configuration settings such as sensitive data rules aren't loaded when an agent logs in to the console.
Live Chat Visitors	"Read"	Enables agents to view visitor records	We don't recommend giving agents the ability to create, edit, and delete visitor records. Visitor records are created automatically and are meant to provide a paper trail that associates your customers with their chat transcripts, so we don't recommend giving agents the ability to change these records.
Live Chat Transcripts	"Read"	Enables agents to view chat transcripts	We don't recommend giving agents the ability to create, edit, and delete chat transcripts. Transcripts are created automatically and are meant to provide a paper trail about your agents' interactions with customers, so we don't recommend giving agents the ability to change these records.
Quick Text	"Read"	Enables agents to view quick text messages and include quick text in chats.	Without the "Read" permission on quick text, agents can't access the quick text sidebar in the Salesforce console.

Record Type	Permission	Description	Considerations
	"Create"	Enables agents to create quick text messages	If you want to standardize quick text messages across your organization, limit your agents' ability to create quick text messages. In that case, give the "Create" permission to support supervisors instead.
	"Edit"	Enables agents to edit quick text messages	If you want to standardize quick text messages across your support organization, limit your agents' ability to edit quick text messages. In that case, give the "Edit" permission to support supervisors instead.
	"Delete"	Enables agents to delete quick text messages	If you want to standardize quick text messages across your organization, limit your agents' ability to delete quick text messages. In that case, give the "Delete" permission to support supervisors instead.

SEE ALSO:

- Chat Session Records
- Chat Transcripts
- Chat Visitor Records
- Edit Object Permissions in Profiles

Permissions for Chat Support Supervisors

You must enable certain permissions for Chat support supervisors so that they have all the tools they need to monitor agents' activities and review customers' information.

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EDITIONS

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

General Permissions

Necessary Permission	Description
"API Enabled"	Required for all Chat users

Optional Permission	Description
"Assign Chat Skills to Users"	Enables supervisors to assign skills to agents.

Object Permissions

Record Type	Permission	Description	Considerations
Chat Sessions	"Read"	Enables supervisors to view session records	None
	"Create"	Enables supervisors to create session records	Session records are created automatically and are meant to provide a paper trail that provides information about the time that agents spend online. We don't recommend tampering with these records, but you can give supervisors the ability to create them manually.
	"Edit"	Enables supervisors to edit session records	Session records are created automatically and are meant to provide a paper trail that provides information about the time that agents spend online. We don't recommend tampering with these records, but you can give supervisors the ability to edit them.
	"Delete"	Enables supervisors to delete session records	Session records are created automatically and are meant to provide a paper trail that provides information about the time that agents spend online. We don't recommend tampering with these records, but you can give supervisors the ability to delete them.
Live Chat Transcripts	"Read"	Enables supervisors to view chat transcripts	None
	"Create"	Enables supervisors to create chat transcripts	Chat transcripts are created automatically and are meant to provide a paper trail about your agents' interactions with customers. We don't recommend tampering with these records, but you can give supervisors the ability to create transcripts manually.
	"Edit"	Enables supervisors to edit chat transcripts	Chat transcripts are created automatically and are meant to provide a paper trail about your agents' interactions with customers. We don't recommend tampering with these records, but you can give supervisors the ability to edit transcripts.
	"Delete"	Enables supervisors to delete chat transcripts	Chat transcripts are created automatically and are meant to provide a paper trail about your agents' interactions with customers. We don't recommend tampering with these records, but you can give supervisors the ability to delete transcripts.

Record Type	Permission	Description	Considerations
Live Chat Visitors	"Read"	Enables supervisors to view visitor records	None
	"Create"	Enables supervisors to create visitor records	Visitor records are created automatically and are meant to provide a paper trail that associates your customers with their chat transcripts. We don't recommend tampering with these records, but you can give supervisors the ability to create them manually.
	"Edit"	Enables supervisors to edit visitor records	Visitor records are created automatically and are meant to provide a paper trail that associates your customers with their chat transcripts. We don't recommend tampering with these records, but you can give supervisors the ability to edit them.
	"Delete"	Enables supervisors to delete visitor records	Visitor records are created automatically and are meant to provide a paper trail that associates your customers with their chat transcripts. We don't recommend tampering with these records, but you can give supervisors the ability to delete them.
Quick Text	"Read"	Enables supervisors to view Quick Text messages	None
	"Create"	Enables supervisors to create Quick Text messages	None
	"Edit"	Enables supervisors to edit Quick Text messages	None
	"Delete"	Enables supervisors to delete Quick Text messages	None

SEE ALSO:

- Chat Session Records
- Chat Transcripts
- Chat Visitor Records
- Edit Object Permissions in Profiles

Create and Assign Chat Skills

Skills identify your agents' areas of expertise. When you assign an agent to a skill, that agent receives chat requests that are related to the agent's skill areas. You can also enable your supervisors to assign skills to agents. This information applies to Live Agent routing for chats only.

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Before you can assign a user or profile to a skill or remove a user or profile from a skill, chat must be enabled.

Note: The Skill object is visible to all users. No user permissions are needed to view skills.

1. From Setup, enter *Skills* in the Quick Find box, then select **Skills**.
2. Click **New**.
3. Enter a name for the skill.

   For example, you can create a skill that's called "Accounts" for agents who specialize in questions about customer accounts.
4. In the Assign Users area, select the users whom you want to associate with the skill.
5. In the Assign Profiles area, select the profiles that you want to associate with the skill.
6. Click **Save**.

To enable supervisors to assign skills, enable the "Assign Chat Skills to Users" permission on their profiles, or assign it to individual users via a permission set. When supervisors have this permission, they can go to **Setup** > **Customize** > **Chat Skills** and update the assigned profiles or users under each skill.

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 create skills:
- Customize Application

To assign skills (supervisors):
- Assign Chat Skills to Users OR Customize Application

Create Chat Agent Configurations

Chat agent configurations define the functionality that's available to your agents and support supervisors. Create configurations to give different capabilities to multiple types of users,

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For efficiency, create profiles and users before you create configurations. That way, you can create a configuration and assign it to users and profiles at the same time.

Chat agent configurations enable you to control your users' access to certain Chat features. You can create multiple configurations and assign them to different types of users. For example, create a configuration for experienced agents that gives them more permissions than new agents have. Or, create a configuration for support supervisors that gives them the permissions that they need to monitor their employees.

1. From Setup, enter *Chat Agent Configurations* in the Quick Find box, then select **Chat Agent Configurations**.
2. Click **New**.
3. Choose the settings for your Chat agent configuration.
4. Click **Save**.

SEE ALSO:

Create Chat Users

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USER PERMISSIONS

To create and edit configurations:

- Customize Application

Create Chat Deployments

A deployment is a place on your company's website that's enabled for Chat. Create deployments to implement Chat and control its functionality on your website.

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To customize the chat window that your customers see, first create a Salesforce site to host your custom images.

A deployment consists of a few lines of JavaScript that you add to a web page. Your organization can have a single Chat deployment or multiple deployments. For example, if you have a single service center that supports multiple websites, creating a separate deployment for each site enables you to present multiple chat windows to your visitors.

Tip: If you move instances for an instance refresh or org migration, regenerate the code using these steps after the maintenance is complete.

1. From Setup, enter `Deployments` in the Quick Find box, then select **Deployments**.
2. Click **New**.
3. Choose the settings for your deployment.
4. Click **Save**.
   Salesforce generates the deployment code.
5. Copy the deployment code, and then paste it on each web page where you want to deploy Chat. For best performance, paste the code immediately before the closing body tag (that is, `</body>`).

SEE ALSO:

Customize Your Chat Branding with Salesforce Sites

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

USER PERMISSIONS

To create deployments:
- Customize Application

Create Chat Buttons

Create chat buttons to enable customers to request a chat with an agent directly from your website.

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Before you create chat buttons:

- Create skills. Each chat button is associated with a particular skill or set of skills. Chats that are initiated from the button are routed to agents with those skills.
- To use custom images for the online and offline versions of your button, create a Salesforce site and static resources. If you don't have a Salesforce site, you can specify online and offline button images or text by modifying the code that's generated when you create a button.

Create the buttons that visitors click to start chats. Like a deployment, a button consists of several lines of JavaScript that you copy and paste into web pages. A single deployment can have multiple buttons; each button enables you to refine the chat experience for visitors. For example, create buttons for laptop, phone, or tablet issues. Each button is mapped to a skill or set of skills to ensure that visitors' inquiries go to agents who can solve their problems.

1. From Setup, enter `Chat Buttons` in the Quick Find box, then select **Chat Buttons & Invitations**.
2. Click **New**.
3. Select Chat Button from the `Type` field.
4. Choose the settings for your chat button.
5. Click **Save**.
6. Copy the button code, and then paste it on each web page where you've deployed Chat. Make sure that you paste the code in the area on the page where you want the button to appear.

   Tip: Because the code changes with each modification, remember to copy and paste the code each time that you update the button.

After you create the button and add it to the web page, the chat button is enabled for your customers to click as long as:

- The number of chats doesn't exceed the button's queue size.
- At least one agent has available capacity and the required skills listed in the associated routing configuration.

Chat Routing Options

Routing options in Chat enable you to specify how incoming chat requests are directed to agents. To use Chat in Lightning Experience, you must route chats with Omni-Channel. New chat buttons must use Omni-Channel routing—legacy Live Agent routing is no longer available.

EDITIONS

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

USER PERMISSIONS

To create and customize chat buttons:

- Customize Application

Chat Queuing Options

Queuing options in Chat let you control how incoming chat requests are handled when no agents are available.

SEE ALSO:

Create and Assign Chat Skills

Customize Your Chat Branding with Salesforce Sites

Chat Routing Options

Routing options in Chat enable you to specify how incoming chat requests are directed to agents. To use Chat in Lightning Experience, you must route chats with Omni-Channel. New chat buttons must use Omni-Channel routing—legacy Live Agent routing is no longer available.

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Example:

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Routing Option	Description
`Omni-Channel`	Incoming chats are routed to agents using Omni-Channel queues. To configure dynamic skill requirements, select the Omni-Channel routing type and configure skills-based routing rules.
`Button Skills`	Incoming chats are routed to agents using skills associated with the button. **Note:** You can't transfer a chat conference if it's routed using button skills. To transfer chat conferences, change the routing type to Omni-Channel.
`Choice`	Incoming chat requests are added to the queue in Chat in the Salesforce console and are available to any agent with the required skill. Not supported in Lightning Experience.
`Least Active`	Incoming chats are routed to the agent with the required skill who has the fewest active chats. This option is a push option, which means that incoming chats are routed, or "pushed," to agents. You can specify the amount of time that an agent has to answer a chat request before it's routed to the next available, qualified agent. Not supported in Lightning Experience.
`Most Available`	Incoming chats are routed to the agent with the required skill and the greatest difference between chat capacity and active chat sessions. For example: Agent A has a capacity of eight and Agent B has a capacity of

Routing Option	Description
	two. If Agent A has two active chat sessions while Agent B has one, incoming chats are routed to Agent A. This option is a push option, which means that incoming chats are routed, or "pushed," to agents. You can specify the amount of time that an agent has to answer a chat request before it's routed to the next available, qualified agent. Not supported in Lightning Experience.

Chat Queuing Options

Queuing options in Chat let you control how incoming chat requests are handled when no agents are available.

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For each chat button or invitation that you create, you can enable queuing. Queuing puts incoming chat requests on hold if no qualified agents are available to accept the requests. You can also specify the maximum number of requests in a queue. By enabling queues and setting limits for them, you can control how incoming chat requests are handled, which helps agents manage chat backlogs.

If queuing is enabled, your company can accept incoming chat requests even when agents are at capacity. You can specify the maximum number of requests to accept. Queuing helps agents work effectively and limits the amount of time that customers spend waiting to chat.

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Chat routing options determine the way that queuing works. Routing options are set through your chat button or automated invitation. See Chat Routing Options to learn more about how you can route chats to the right agents.

Let's look at how queuing and routing options work together.

Queuing Option	With This Routing Option	Results
Queuing is not enabled	`Choice`	• Customers see your chat button and can submit new requests unless there are no qualified agents available or all online agents have reached capacity. • Incoming chat requests are added to the Chat Requests list. • When agents have capacity for new chat sessions, they can select incoming requests from the list.
Queuing is not enabled	`Least Active` or `Most Available`	• Customers see your chat button and can submit new requests unless there are no qualified agents available or all online agents have reached capacity.

Queuing Option	With This Routing Option	Results
		• When agents have the capacity for new chat sessions, requests are routed to them.
Queuing is enabled without a per-agent or overall limit	`Choice`	• Customers see your chat button and can submit new requests unless there are no qualified agents available. • Incoming chat requests are added to the Chat Requests list. • When agents have capacity for new chat sessions, they can accept incoming requests from the list.
Queuing is enabled without a per-agent or overall limit	`Least Active` or `Most Available`	• Customers see your chat button and can submit new requests unless there are no qualified agents available. • When agents have the capacity for new chat sessions, requests are routed to them.
Queuing is enabled with a per-agent or overall limit defined	`Choice`	• Customers see your chat button and can submit new requests unless there are no qualified agents available, or until the queue limit is reached. Then, customers see the offline version of the button until older chat sessions have ended and an agent is available. • Incoming chat requests are added to the queue until the per-agent or overall limit is reached. No new requests are accepted until older chat sessions have ended. • When agents have capacity for new chat sessions, they can accept incoming requests from the list.
Queuing is enabled with a per-agent or overall limit defined	`Least Active` or `Most Available`	• Customers see your chat button and can submit new requests unless there aren't any qualified agents available, or until the queue limit is reached. Then, users see the offline version of the button until older chat sessions have ended and an agent is available. • Incoming chat requests are added to the queue until the per-agent or overall

Queuing Option	With This Routing Option	Results
		limit is reached. No new requests are accepted until older chat sessions have ended. • When agents have capacity for new chat sessions, requests are routed to them.

SEE ALSO:

Chat Routing Options

Customize Your Chat Branding with Salesforce Sites

To customize your Chat implementation with images, use a Salesforce Site to upload the images for your chat window and chat buttons.

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To customize your chat window and chat buttons, create one or more Salesforce Sites. Then, upload the images that you want to use as static resources. Static resources enable you to upload content that you can reference in a Visualforce page. Each static resource has its own URL that Salesforce uses to access the images when the chat window loads.

1. Create a Salesforce Site to host your images.

   When you create a Salesforce Site for your Chat deployment, provide the following information.

   - A site label and site name
   - A site contact
   - The active site's home page
   - A site template

2. Upload your branding images as static resources.

Note: The maximum size for a standard chat window image is 50 pixels.

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USER PERMISSIONS

To create and edit Salesforce Sites:

- Customize Application

SEE ALSO:

Create and Edit Salesforce Sites

Define Static Resources

Create Automated Chat Invitations

Create Chat Deployments

CUSTOMIZE YOUR CHAT IMPLEMENTATION

After you set up your basic Chat implementation, customize it with solutions that are appropriate for your agents, supervisors, and customers. Chat offers several options for customizing your implementation declaratively, which means that no coding is required.

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Pre-Chat Forms and Post-Chat Pages

Pre-chat forms and post-chat pages in Chat enable you to exchange information with customers who contact your company through chat.

Set Visibility for Chat Users

Choose how your Chat users can view the Supervisor Tab and Chat Sessions using profiles and permission sets.

SEE ALSO:

Create a Basic Chat Implementation

Add Chat to the Salesforce Console

Pre-Chat Forms and Post-Chat Pages

Pre-chat forms and post-chat pages in Chat enable you to exchange information with customers who contact your company through chat.

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

Pre-chat forms and post-chat pages offer a standardized way of collecting information from customers who contact your company through chat. These forms and pages also offer a standardized way of sharing information with customers after their chat sessions are finished. In addition, by using these forms and pages, you can customize the chat experience for your users.

By using pre-chat forms, you can collect information from a customer, such as a name or a description of a problem, after the customer requests to chat with an agent. This information can help direct chat requests efficiently and can reduce the amount of time that agents need to spend collecting information before beginning a chat session. You can also use this information to customize a customer's experience while the customer chats with an agent, such as including the customer's first name in the chat window.

By using post-chat pages, you can share information with customers at the end of a chat session. For example, you can direct your customers to another Web page after they complete a chat with an agent, and you can forward them to a survey about their chat experience.

You have to create pre-chat forms and post-chat pages programmatically, using Chat's APIs. For information on creating customized pre-chat forms and post-chat pages, see the Chat Developer Guide (English only).

Set Visibility for Chat Users

Choose how your Chat users can view the Supervisor Tab and Chat Sessions using profiles and permission sets.

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

Important: The legacy chat product is scheduled for retirement on February 14, 2026, and is in maintenance mode until then. During this phase, you can continue to use chat, but we no longer recommend that you implement new chat channels. To avoid service interruptions to your customers, migrate to Messaging for In-App and Web before that date. Messaging offers many of the chat features that you love plus asynchronous conversations that can be picked back up at any time. Learn about chat retirement in Help.

Set Visibility for the Supervisor Tab Through Profiles

The Chat supervisor panel is your supervisors' one-stop shop for finding information about their organizations' chat buttons and chat agents. Make the Chat supervisor tab visible to users who are assigned to specified profiles.

Set Visibility for the Chat Sessions Tab through Permission Sets

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. Make the Chat sessions tab visible to users who are assigned to specified permission sets.

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1. From Setup, enter `Profiles` in the Quick Find box, then select **Profiles**.
2. Click **Edit** next to the profile that you want to give access to the supervisor tab.
3. Set the visibility of the Chat supervisor tab to `Default On`.
4. Click **Save**.

After you give your users permission to access the Chat supervisor tab, set up access to the Chat supervisor panel in the Salesforce console.

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 set tab visibility for Chat features:

- Manage Profiles and Permission Sets

Set Visibility for the Chat Sessions Tab through Permission Sets

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. Make the Chat sessions tab visible to users who are assigned to specified permission sets.

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Alternatively, you can give users access to the Chat sessions tab through profiles.

1. From Setup, enter `Permission Sets` in the Quick Find box, then select **Permission Sets**.
2. Click the name of a permission set, or create a permission set.
3. Click **Object Settings**.
4. Click **Chat Sessions**.
5. Click **Edit**.
6. In Tab Settings, select `Available` and `Visible`.

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 set tab visibility for Chat features:

- Manage Profiles and Permission Sets

7. Click **Save**.

SEE ALSO:

Set Visibility for the Chat Sessions Tab through Profiles

Chat Session Records

Set Visibility for the Chat Sessions Tab through Profiles

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. Make the Chat sessions tab visible to users who are assigned to specified profiles.

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Alternatively, you can give users access to the Chat sessions tab through permission sets.

1. From Setup, enter *Profiles* in the Quick Find box, then select **Profiles**.
2. Select a support agent profile.
3. Click **Edit**.
4. Set the visibility of the Chat sessions tab to `Default On`.
5. Click **Save**.

SEE ALSO:

Set Visibility for the Chat Sessions Tab through Permission Sets

Chat Session Records

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 set tab visibility for Chat sessions:

- Manage Profiles and Permission Sets

SET UP CHAT IN THE SALESFORCE CONSOLE IN SALESFORCE CLASSIC

After you set up and customize your basic Chat implementation, add it to the Salesforce console so that your agents and supervisors can start using chat to assist customers. Additionally, you can set up some other features in the Salesforce console to create an even more robust chat experience for your agents and your customers.

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Add Chat to the Salesforce Console

Adding Chat to the Salesforce console enables agents and supervisors to chat with customers and access other customer service tools in one place.

Set Up Chat Answers from Knowledge Articles

If your organization uses Salesforce Knowledge, you can enable your agents to answer customer questions by using information from your knowledge base. Set up chat answers on articles so that agents can search for articles from Chat in the Salesforce console.

Add the Supervisor Panel to the Salesforce Console

Add the supervisor panel to the Salesforce console in Salesforce Classic to make your support supervisors' work easier. That way, supervisors can access information about their agents without having to switch between workspaces.

Add a Lookup Component for Chats Routed with Omni-Channel to the Salesforce Console

Provide agents with a sidebar lookup component in their Salesforce console so they can quickly look up or create associated records for chats. This component is only for chats using Omni-Channel routing, and can be used in Salesforce Classic only.

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 set up Chat:

- Customize Application

To create user profiles or permission sets:

- Manage Profiles and Permission Sets

SEE ALSO:

- Create a Basic Chat Implementation
- Customize Your Chat Implementation
- Set Up a Salesforce Console App in Salesforce Classic

Add Chat to the Salesforce Console

Adding Chat to the Salesforce console enables agents and supervisors to chat with customers and access other customer service tools in one place.

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Before you add Chat to a Salesforce console app, you need to create a Salesforce console app if you don't have one set up.

After you set up Chat, add it to a Salesforce console app. After Chat is set up in the console, your agents can interact with chat customers. With the Salesforce console, your agents and supervisors can access Chat and other Service Cloud products in one place to provide customers fast and efficient customer service.

1. From Setup, enter *Apps* in the Quick Find box, then select **Apps**.
2. Click **Edit** next to the name of the Salesforce console app in which you want to set up Chat.
3. Select `Include Chat in this App`.
4. Choose the records or pages that you want to open as subtabs of chat sessions in the chat workspace.
5. Optionally, if your Salesforce org has Knowledge enabled, select `Include Suggested Articles from Knowledge in Chat` to display the Knowledge One widget in the chat workspace.
6. Click **Save**.

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

SEE ALSO:

Set Up a Salesforce Console App in Salesforce Classic

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 add Chat to the Salesforce console:

- Customize Application

Set Up Chat Answers from Knowledge Articles

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To let agents use the Knowledge One widget to include information from Knowledge articles in chats, add a custom field called "Chat Answer" to article types. This field stores information from the article that's appropriate to share with customers during a live chat. Using this field can be helpful for articles that are too long for an agent to include easily in a response.

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

Create the custom field as a Text, Text Area, or Text Area (Long). The Rich Text Field option is not supported. Add this custom field to each article type that contains information that you want operators to access from the Knowledge One widget.

1. From Setup, enter *Knowledge Article Types* in the Quick Find box, then select **Knowledge Article Types**.
2. Create or edit an article type.
3. Click **New** in the Fields related list.
4. Select `Text`, `Text Area`, or `Text Area (Long)`.

   Don't select `Text Area (Rich)`.
5. Click **Next**.
6. Enter *Chat Answer* in Field Label.

   Make sure that Field Name is populated automatically with Chat_Answer. (You can use a different name for the Field Label.)
7. Click **Next**.
8. Specify security settings, and then click **Next**.

   Make the Chat Answer field visible to authors, editors, and live chat agents. Hide it from portal users or other users who don't need access to it.
9. Select `Yes, add this custom field to the layout`, and then click **Save**.

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 set up the Knowledge One widget:

- Customize Application

  AND

  Manage Knowledge

Add the Supervisor Panel to the Salesforce Console

Add the supervisor panel to the Salesforce console in Salesforce Classic to make your support supervisors' work easier. That way, supervisors can access information about their agents without having to switch between workspaces.

Important: The legacy chat product is scheduled for retirement on February 14, 2026, and is in maintenance mode until then. During this phase, you can continue to use chat, but we no longer recommend that you implement new chat channels. To avoid service interruptions to your customers, migrate to Messaging for In-App and Web before that date. Messaging offers many of the chat features that you love plus asynchronous conversations that can be picked back up at any time. Learn about chat retirement in Help.

1. In Setup, enter *Apps* in the Quick Find box, then select **App Manager**.
2. Click **Edit** next to the Salesforce console app that you want to add the supervisor panel to.
3. In the Navigation Items tab, add `Chat Supervisor` to the Selected Items list.
4. Click **Save**.

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 set up Chat and manage apps:

- Customize Application

Add a Lookup Component for Chats Routed with Omni-Channel to the Salesforce Console

Provide agents with a sidebar lookup component in their Salesforce console so they can quickly look up or create associated records for chats. This component is only for chats using Omni-Channel routing, and can be used in Salesforce Classic only.

Important: The legacy chat product is scheduled for retirement on February 14, 2026, and is in maintenance mode until then. During this phase, you can continue to use chat, but we no longer recommend that you implement new chat channels. To avoid service interruptions to your customers, migrate to Messaging for In-App and Web before that date. Messaging offers many of the chat features that you love plus asynchronous conversations that can be picked back up at any time. Learn about chat retirement in Help.

Before you add a sidebar component to the Salesforce console app, you need:

- A Salesforce console app with Chat and Omni-Channel added to it.
- At least one chat button that uses the routing option **Omni**.
- Edit access for Live Chat Transcript granted to agents handling chats routed through Omni-Channel.

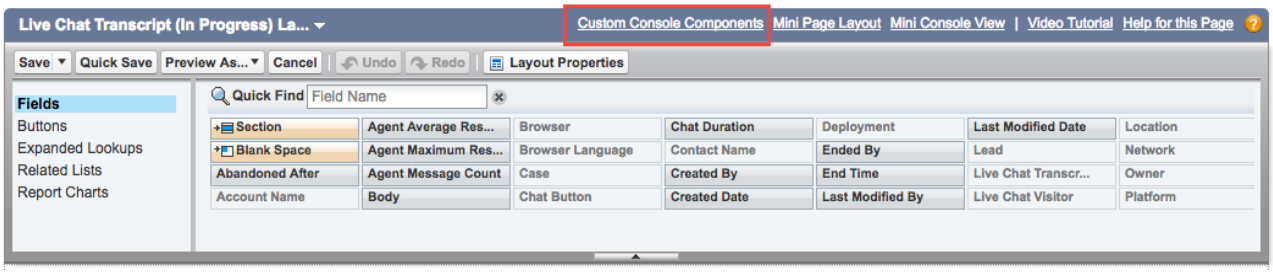
1. From Setup, enter *Chat* in the `Quick Find` box, then select **Live Chat Transcripts** > **Page Layouts**.
2. Click **Edit** next to the Live Chat Transcript (In Progress) Page Layout.
3. Click **Custom Console Components**.

EDITIONS

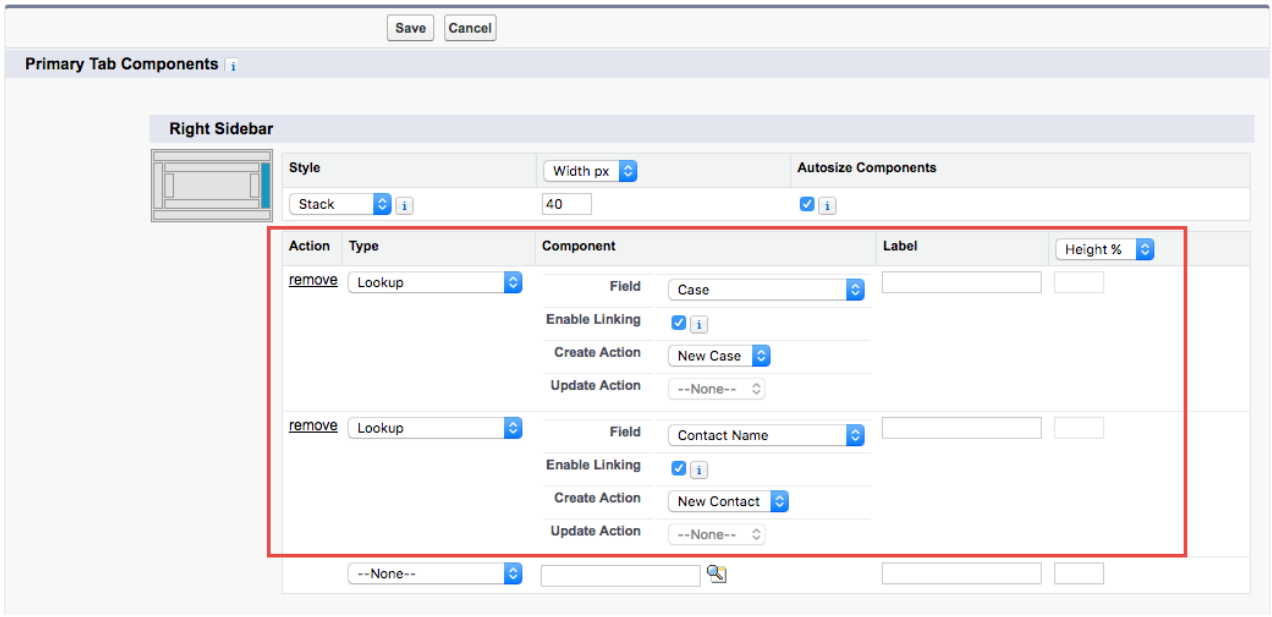
Available in: Salesforce Classic

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



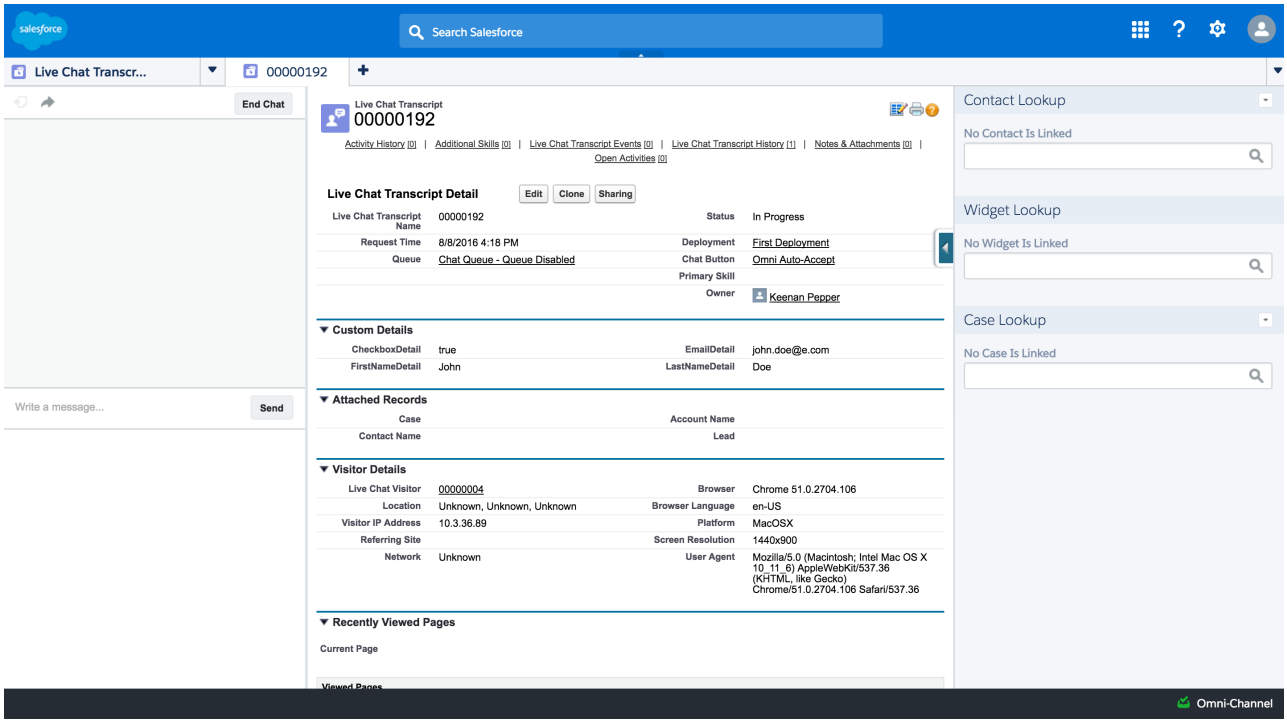
4. Under Primary Tab Components, adjust your objects and other settings. Don't move the component to the left sidebar, as chats appear on the left side.



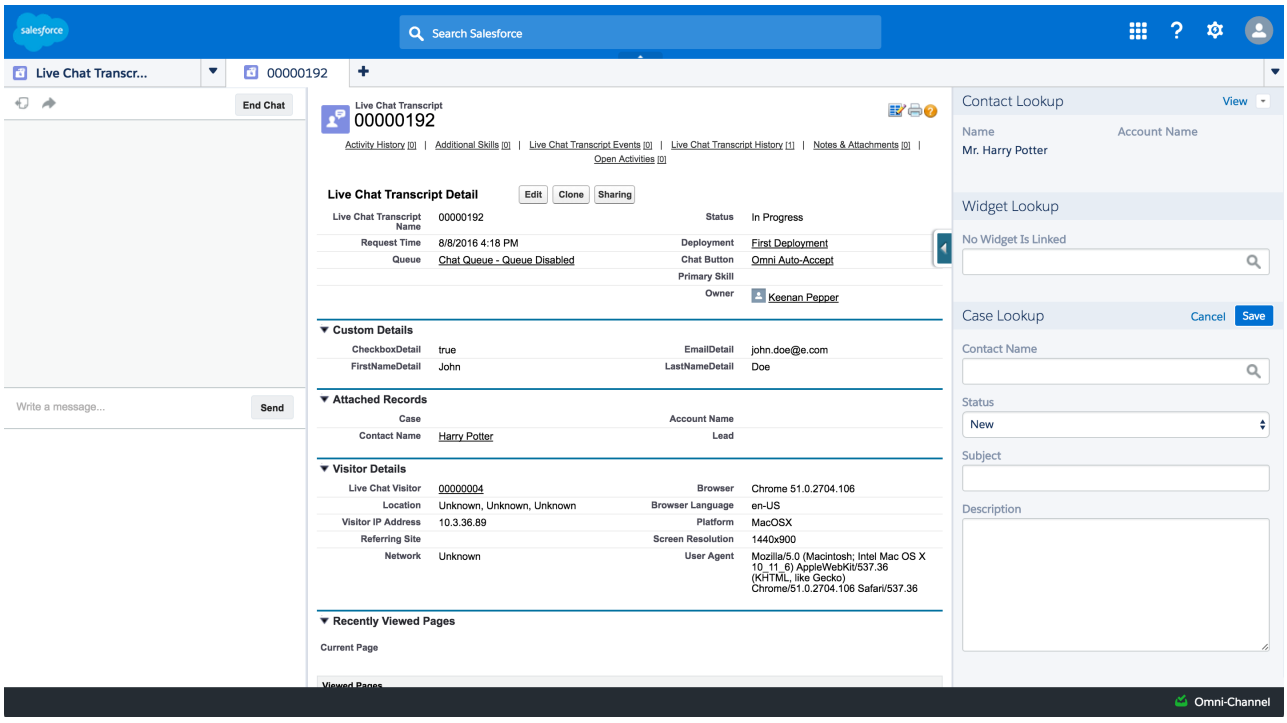
5. Click **Save**.

Agents can now link and unlink records using the sidebar component.

Sidebar Lookup Component with No Linked Records



Sidebar Lookup Component with Linked Contact Record



MIGRATE FROM LEGACY LIVE AGENT TO OMNI-CHANNEL FOR CHAT

Are you loving Chat and want to add Omni-Channel to the mix? Here's what changes for you and your organization (and not for your agents!).

Important: The legacy chat product is scheduled for retirement on February 14, 2026, and is in maintenance mode until then. During this phase, you can continue to use chat, but we no longer recommend that you implement new chat channels. To avoid service interruptions to your customers, migrate to Messaging for In-App and Web before that date. Messaging offers many of the chat features that you love plus asynchronous conversations that can be picked back up at any time. Learn about chat retirement in Help.

So, you've decided to take your customer service to the next level by using Chat and Omni-Channel in tandem. That's great! Once everything's set up, you'll find that the two work together in perfect harmony.

Chat is powered by Chat Configurations, which control the behaviors and settings that are available to Chat users. Similarly, Omni-Channel uses Presence Configurations to control the behaviors and settings that are available to Omni-Channel users. You can integrate Chat with Omni-Channel so chats are routed just like other work items, and you can even use Omni-Channel routing for your chats. Whichever way you use Omni-Channel with Chat, your agents are then able to accept or reject chat requests right from the Omni-Channel widget.

When you integrate Chat and Omni-Channel, your Chat users also become Omni-Channel users, so your chat agents must be associated with both a Chat Configuration and a Presence Configuration. Luckily, Salesforce does some of the heavy lifting for you when you enable Omni-Channel with your current Chat implementation.

For each Chat Configuration that you already have in your org, Salesforce:

- Creates a corresponding Presence Configuration for each of your Chat Configurations
- Sets the chat capacity for each Presence Configuration to what's set in its corresponding Chat Configuration
- Assigns your chat agents to the new corresponding Presence Configurations

If you have Chat enabled but don't have an implementation, when you enable Omni-Channel, Salesforce creates a Chat Service Channel.

Salesforce does all this automatically so there's no disruption to your agents' workflow. They can start accepting chats through Omni-Channel in the app. The only difference they see is that they now use Omni-Channel in the app to set their status and accept chat notifications. They may also see a change in their status options, as Omni-Channel presence statuses are configurable.

If you want to use Chat and Omni-Channel in Lightning Experience, you must use Omni-Channel routing for your chats. All you have to do is create a chat button with the routing type Omni-Channel and set up Skills-Based Routing Rules or assign your agents to queues. Then, add the Omni-Channel component and Live Chat Transcripts to your Lightning app, and your agents can start accepting chat requests.

Compare Live Agent and Omni-Channel Routing for Chats

See the benefits and limitations of using Omni-Channel routing for chats or keeping Live Agent routing for chats. If you want to use Chat in Lightning Experience, you must use Omni-Channel routing.

Manage Chat Capacity with Omni-Channel

If your support organization has been using Chat for a while, you know that you can select an agent's maximum number of chats by using the `Chat Capacity` field. When Omni-Channel is enabled in your Salesforce org, however, you need to manage your agent's chat capacity using Omni-Channel configurations instead.

Compare Live Agent and Omni-Channel Routing for Chats

See the benefits and limitations of using Omni-Channel routing for chats or keeping Live Agent routing for chats. If you want to use Chat in Lightning Experience, you must use Omni-Channel routing.

Important: The legacy chat product is scheduled for retirement on February 14, 2026, and is in maintenance mode until then. During this phase, you can continue to use chat, but we no longer recommend that you implement new chat channels. To avoid service interruptions to your customers, migrate to Messaging for In-App and Web before that date. Messaging offers many of the chat features that you love plus asynchronous conversations that can be picked back up at any time. Learn about chat retirement in Help.

There's a lot to keep in mind as you decide whether to try Omni-Channel routing for chats. Omni-Channel routing for chats is enabled when:

- You enable Chat for the first time, or
- You create a chat button that uses the routing option **Omni-Channel Queues** or **Omni-Channel Skills**

Let's compare the two routing model options when using Chat and Omni-Channel together.

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

Live Agent Routing (Salesforce Classic only)	Omni-Channel Routing
Agents must chat with customers in the console in Salesforce Classic.	Agents can chat with customers in the console in Salesforce Classic or in standard or console apps in Lightning Experience.
Agents use the Omni-Channel widget in Salesforce Classic to handle their work.	Agents use the Omni-Channel widget in Salesforce Classic or the Omni-Channel component in Lightning Experience to handle their work.
Agents use Omni-Channel Presence, including its configurable statuses.	Agents use Omni-Channel Presence, including its configurable statuses.
Use Omni-Channel sound notifications in the Presence Configuration for chats.	Use Omni-Channel sound notifications in the Presence Configuration for chats.
Agent capacity is set and consumed by Omni-Channel.	Agent capacity is set and consumed by Omni-Channel.
Chats are routed to agents using Skills.	Chats are routed to agents using Omni-Channel queues.
Chats can't be prioritized with Omni-Channel work, or relative to each other. Omni-Channel work items that haven't yet been routed are always routed ahead of chats.	Chats are prioritized with Omni-Channel work, and can be prioritized relative to each other using queues.
Chats always have the size 1.	Chat size is configurable by queue.
Supervisors use the Chat Supervisor Panel to observe chats and assist agents with their chats.	Chat supervisors can view agent activity in Omni Supervisor, but they use the Chat Supervisor Panel to observe chats and assist agents with their chats. Create a skill for agents handling chats routed with Omni-Channel to make them visible in the Chat Supervisor Panel.
Reports and data for chats are separate from Omni-Channel data.	Chat data is included in Agent Work reports in addition to Chat reports.

Live Agent Routing (Salesforce Classic only)	Omni-Channel Routing
For a queue to appear as an option on the Chat button, the queue must include the Chat Sessions object in its support objects.	For a queue to appear as an option on the Chat button, the queue must include the Live Chat Transcript object in its supported objects.
The Live Chat Transcript is created when the chat ends.	The Live Chat Transcript is created when the chat is requested.
You can customize the Live Chat Transcript page layout for Ended chats.	In Salesforce Classic, you can customize the Live Chat Transcript page layout for Waiting, In Progress, and Ended chats. In Lightning Experience, you can customize Live Chat Transcript pages in the Lightning App Builder.
Agents associate records with the chat transcript only after the chat has ended.	Agents can associate records with the chat transcript during the chat. Agents can associate records on the chat transcript itself or use a console sidebar lookup component in Salesforce Classic.
Uses the Console Integration Toolkit Methods for Chat.	Uses the Console Integration Toolkit Methods for Omni-Channel for Salesforce Classic, or Omni-Channel Objects for the Lightning Console JavaScript API for Lightning Experience.
If you use the `findorCreate` code to find or create related records, the code triggers only when an agent accepts the chat request.	If you use the `findorCreate` code to find or create related records, the code triggers even if the chat visitor cancels the chat before the agent accepts.

However, there are a few limitations to using Omni-Channel routing for chats:

- You can't transfer a chat from a button using Live Agent routing to a button using Omni-Channel routing.
- Queues with multiple object types can cause problems when using Omni-Channel routing. We recommend creating a queue for each object type, such as Chats, Cases, and Leads, instead of setting queues to handle multiple object types.
- When an agent uses "Transfer to Agent" for a chat routed with Omni-Channel and the receiving agent has an admin profile, the agent who initiated the transfer can lose visibility of the chat transcript until the receiving agent accepts the chat request. This situation occurs because Omni-Channel changes ownership of the chat transcript when the transfer is initiated, before the next agent accepts the chat.

Manage Chat Capacity with Omni-Channel

If your support organization has been using Chat for a while, you know that you can select an agent's maximum number of chats by using the `Chat Capacity` field. When Omni-Channel is enabled in your Salesforce org, however, you need to manage your agent's chat capacity using Omni-Channel configurations instead.

Omni-Channel lets your call center route incoming work items—including cases, leads, or custom objects—to available agents in your support organization. With Chat routing, you could route chats to agents in real time. With Omni-Channel, you can extends this capability to other objects.

Chat routing and Omni-Channel routing differ in one important way: With Omni-Channel, you can enable agents to receive chats and other kinds of objects. For example, you might have a group of agents who can accept chats and incoming cases in real time, all in the Salesforce console. You can control all of these settings with presence configurations. Presence configurations, like Chat configurations, let you set your agents' capacity to receive these work items, including chats.

When you enable Omni-Channel, we create a Default Presence Configuration for you. All agents, chat or otherwise, are assigned to this configuration unless you create a customized configuration and assign users to it. First, decide whether you're using the Default Presence Configuration or a custom one to manage your agents' chat capacity. If your chat agents can accept work items for other objects, make sure that you factor that into the new capacity that you assign to them. After you've decided what the appropriate capacity is for the agents who are assigned to that configuration, edit the configuration's capacity.

1. From Setup, enter *`Presence Configurations`* in the `Quick Find` box, then select **Presence Configurations**.
2. Click **Edit** next to the presence configuration that's associated with your chat agents.
3. Change the capacity to the maximum number of work items, including chats, that an agent can take on at a time.
4. Click **Save**.

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 set up Omni-Channel:
- Customize Application

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