Service Cloud Chat Developer Guide

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CHAPTER 1 About This Guide

Customize Chat to fit your company's needs. This guide provides several examples to help you understand and create customized chat windows, buttons, forms, and pages.

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.

Chat lets service organizations connect with customers or website visitors in real time through a Web-based, text-only live chat. You can customize Chat to create a personalized chat experience for your customer service agents and the customers they serve using custom code. In this guide, we'll show you how to:

- Customize deployments using the Deployment API.
- Customize the appearance of customer-facing chat windows using Visualforce pages and components.
- Create pre-chat forms to gather information from customers before they begin a chat with an agent.
- Create post-chat pages that appear to customers after a chat is complete.

Additionally, you can customize these and other Chat components through Salesforce settings. For more information, see Chat with Customers on Your Website in Salesforce Help.

SEE ALSO:

Salesforce Help: Chat with Customers on Your Website

Embedded Service for Web Developer Guide

Embedded Service SDK for Mobile Devices

CHAPTER 2 Prerequisites

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 customize Chat, make sure:

- Chat is enabled in your organization.
- Your administrator has granted you a Chat feature license. Although you can customize the product without a feature license, having one will allow you to access and test your customizations.
- You've created a Salesforce site and uploaded images as static resources for your chat buttons and windows. If you plan to customize Chat without using a Salesforce site, skip this step.

Note: When using a Salesforce site for Chat custom chat pages, avoid using the path "/liveagent" in the URL. This path sometimes causes errors with the incoming and outgoing chat notification sounds, so agents will be unable to hear their chat updates.

CHAPTER 3 API Versions

Different methods and parameters are available in different versions of Chat's APIs. Before you begin developing with the Deployment API or the Pre-Chat API, make sure you're using the correct API version number in your code.

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Deployment API Versions

You can find out what version of the Deployment API your organization uses from the deployment code that's generated after you create a deployment.

Summer '13 and earlier releases support version 28.0 of the Deployment API. The URL for API version 28.0 looks like this:
`https://MyDomainName.my.salesforce-scrt.com/content/g/deployment.js`

Winter '14 supports version 29.0 of the Deployment API. The URL for API version 29.0 contains the version number:
`https://MyDomainName.my.salesforce-scrt.com/content/g/js/29.0/deployment.js`

Note: To use new methods and parameters in your deployments, you must update the deployment code on each of your Web pages to use the URL for version 29.0 of the Deployment API.

Pre-Chat Information API Versions

Winter '14 supports version 29.0 of the Pre-Chat API. The URL for API version 29.0 contains the version number:
`https://MyDomainName.my.salesforce-scrt.com/content/g/js/29.0/prechat.js`

You can find your organization's hostname by looking in the deployment code that's generated after you create a deployment.

CHAPTER 4 Customize Deployments with the Deployment APIs

Customize deployments using the Chat Deployment API.

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A deployment is a place on your company's website that's enabled for Chat. 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. Each deployment includes a chat window, which visitors use to chat with support agents.

The Deployment API is a JavaScript-based API that lets you customize your deployments to specify back-end functionality.

Create Deployments

Create a deployment to host Chat on your website. Each deployment includes a chat window, which visitors use to chat with support agents.

Log Deployment Activity with the Deployment APIs

Log the activity that occurs in a particular deployment.

Customize Your Chat Window with the Deployment APIs

Customize the dimensions of your customer-facing chat windows. This doesn't apply for mobile-based browsers.

Customize Chat Buttons with the Deployment APIs

Customize your chat buttons and set how chats start for your customers.

Find and Create Records Automatically with the Deployment APIs

Use the Deployment API to search for or create Salesforce records—like a case, contact, account, or lead—automatically when an agent begins a chat with a customer.

Customize Automated Chat Invitations with the Deployment APIs

Customize automated chat invitations that appear to customers on your website.

Deployment API Code Sample

Test and preview how the Deployment API can help you customize your deployments.

Create Deployments

Create a deployment to host Chat on your website. Each deployment includes a chat window, which visitors use to chat with support agents.

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You can customize your Chat deployments using the Deployment API to meet your company's needs. After completing these steps, the deployment code generates for you to place on the pages that you want to enable for chat and tracking. Pages with the deployment code are automatically tracked as part of the visitor's chat session, and they're shown to the agent in the Console when the visitor requests a chat. This tracking also enables automated invitations to be presented to customers.

To create a deployment:

1. From Setup, enter `Deployments` in the `Quick Find` box, then select **Deployments**.
2. Click **New**.
3. Enter a name for the deployment. This name, or a version of it, automatically becomes the `Developer Name`.
4. Enter a title for the chat window.
5. Select `Allow Visitors to Save Transcripts` to let visitors download a copy of the chat session.
6. If you want to use branding images that you've hosted on a Salesforce site, select the site to associate it with the deployment.
7. (Optional) In `Chat Window Branding Image`, select the graphic to appear in the chat window.
8. (Optional) In `Mobile Chat Window Branding Image`, select the graphic that visitors using mobile devices see in the chat window.
9. Click **Save**. Salesforce generates the deployment code.
10. Copy the deployment code and paste it on each Web page where you want to deploy Chat. For best performance, paste the code right before the closing body tag.

Log Deployment Activity with the Deployment APIs

Log the activity that occurs in a particular deployment.

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Logging lets you store information about the activity that occurs within a customer's Web browser as they chat with an agent through a particular deployment. This is particularly helpful when you're implementing automated invitations and you want to test or troubleshoot your sending rules. You can add these methods as an additional script within the code that's automatically generated when you create a deployment.

Use the following deployment methods to enable logging on a particular deployment.

enableLogging
Use the `enableLogging` deployment method to enable logging on a particular deployment. Available in API versions 28.0 and later.

enableLogging

Use the `enableLogging` deployment method to enable logging on a particular deployment. Available in API versions 28.0 and later.

Usage

Enables logging for a particular deployment, allowing your Web browser's JavaScript console to store information about the activity that occurs within a deployment. You can retrieve the information from your browser's developer console, so check the help for your browser if you're not sure how to find it.

Syntax

```
liveagent.enableLogging();
```

Parameters

None

Messages for Logged Events

Message	Triggered	Meaning
System initialized. Waiting for the DOM to be ready.	When liveagent.init() is called, usually at page load	Chat endpoint URL, org ID and deployment ID have been set, now waiting for DOM to be ready before continuing.
No available event model. Exiting.	During liveagent.init(), if there is an error	This means no DOM event listener was found, which would be very rare. We would not be able to continue at this point, so it would be a hard stop.
DOM is ready. Setting up environment.	Upon DOM ready of the page	The page has fully loaded and the DOM is ready, so we perform our first "ping" to the server, which is to get the settings/information about the given deployment ID.
Setting state for button {Button ID} to online	When the state of a button has changed to online	The button is available for a chat request to be made.
Setting state for button {Button ID} to offline	When the state of a button has changed to offline	The button is not available for a chat request to be made.
Requesting new session	During the first ping to the server	No session ID cookie was found, so a new one must be generated. This means it was the first time visiting the site with this deployment code for this browsing session.
Reusing existing session	During the first ping to the server	A session cookie exists, so it is reused. This means the visitor has already been to this site during this browsing session (e.g., going from one page to another).
Received new session ID	As a response to the first ping	The server generated a new session ID, and it is being stored as a session cookie named "liveagent_sid."

Message	Triggered	Meaning
Ping rate set to {Rate}ms	As a response to the first ping	Indicates how frequently (in milliseconds) the page will ping the Chat server. The default is 50000 (50 seconds). This effectively indicates when button refreshes will occur.
Pinging server to keep presence	When a ping to the server is made	Indicates the visitor is still connected to and pinging the Chat server, meaning no errors or disconnects have occurred.
Disconnecting from Chat	When an error occurs	An error was thrown, whether in response from the server or due to network connectivity issues. Indicates that the visitor will no longer ping Chat for this page load (i.e., they will need to refresh).
Received updated Chat server url: {URL}! Consider updating this site's deployment code.	When an org has moved to a new core instance	The Chat instance specified in the deployment code is no longer valid for this org, so the new URL has been provided. For better performance, we recommend updating the deployment code if they receive this.
Server Warning: {Message}	A non-fatal exception occurred	A warning condition was encountered, but processing can continue. The message provides further details.
Server sent an anonymous warning	A non-fatal exception occurred	A warning condition was encountered, but processing can continue. No message was provided.
Server Error: {Message}	A fatal exception occurred	An error condition was encountered, and processing cannot be continued. The message provides further details.
Server responded with an error	A fatal exception occurred	An error condition was encountered, and processing cannot be continued. No message was provided.
Group Start: Invite {Button ID} Rule Evaluation	Rule evaluation has been triggered	Evaluation of the filter logic for the given invite button ID has begun. This means the button is online and available for chat, and the filter logic will be used to determine if it should be displayed/presented or not.
Filter Logic: {Filter Logic}	Rule evaluation has been triggered	An information log containing the string representation of the filter logic of the invite rules as specified in the admin setup area. Useful to understand how the rules will be evaluated.
Evaluating StandardInviteRule	When a standard rule is being evaluated	Standard rules are "Number of Page Views" and "URL Match." They are part of the

Message	Triggered	Meaning
		out-of-the-box rules that are provided in the admin setup area.
Evaluating TimerInviteRule	When a timer-based rule is being evaluated	Timer-based rules are "Seconds on Page" and "Seconds on Site." They are part of the out-of-the-box rules as well, except these rules will be re-evaluated again in the future when the required number of seconds has passed if the criteria was not met the first time (e.g., on page load).
Evaluating CustomInviteRule	When a custom rule is being evaluated	"Custom Variable" rules allow variable names to be specified which will be compared against upon evaluating these rules. The "setCustomVariable" API is used in conjunction with these to specify the value to compare with against the value specified in the admin setup area.
CustomInviteRule evaluation failed due to missing custom variable	When a custom rule is being evaluated	A "Custom Variable" rule was set up, but the "setCustomVariable" API was never called with this variable name specified, therefore the rule can not be evaluated.
Evaluate: {From Value} == {To Value}	When a rule with an "equals" comparator is being evaluated	A rule is being evaluated by comparing that the two values match exactly.
Not Equals - Evaluate: {From Value} != {To Value}	When a rule with a "not equal to" comparator is being evaluated	A rule is being evaluated by comparing that the two values do not match.
Starts With - Evaluate: {From Value} indexOf {To Value} == 0	When a rule with a "starts with" comparator is being evaluated.	A rule is being evaluated by comparing that the first value starts with the second value.
Contains - Evaluate: {From Value} indexOf {To Value} != -1	When a rule with a "contains" comparator is being evaluated	A rule is being evaluated by comparing that the first value contains the second value.
Does Not Contain - Evaluate: {From Value} indexOf {To Value} == -1	When a rule with a "does not contain" comparator is being evaluated	A rule is being evaluated by comparing that the first value does not contain the second value.
Less Than - Evaluate: {From Value} < {To Value}	When a rule with a "less than" comparator is being evaluated	A rule is being evaluated by comparing that the first value is less than the second value.
Greater Than - Evaluate: {From Value} > {To Value}	When a rule with a "greater than" comparator is being evaluated	A rule is being evaluated by comparing that the first value is greater than the second value.
Less or Equal - Evaluate: {From Value} <= {To Value}	When a rule with a "less or equal" comparator is being evaluated	A rule is being evaluated by comparing that the first value is less than or equal to the second value.

Message	Triggered	Meaning
Greater or Equal - Evaluate: {From Value} >= {To Value}	When a rule with a "greater or equal" comparator is being evaluated	A rule is being evaluated by comparing that the first value is greater than or equal to the second value.
Evaluating Atom Node: {Rule ID}	When a rule is being evaluated	Indicates that an actual rule is being evaluated.
Group Start: Evaluating And Node	When two rules are being evaluated with an "AND" clause	When multiple rules are used, this indicates when the criteria of a pair of rules must both be "true."
Group Start: Evaluating Or Node	When two rules are being evaluated with an "OR" clause	When multiple rules are used, this indicates when the criteria of a pair of rules must be "true" for one of them.
Group Start: Evaluating Not Node	When two rules are being evaluated with a "NOT" clause	This indicates to check for the opposite of what the criteria evaluates to.
Setting invite delay to: {Invite Delay}	When a timer-based rule has not yet met the criteria	If the criteria for a timer-based rule is not met, a delay is set to attempt to evaluate the rules again in the future when the criteria will have been met.

Customize Your Chat Window with the Deployment APIs

Customize the dimensions of your customer-facing chat windows. This doesn't apply for mobile-based browsers.

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Use the following deployment methods to customize the height and width of the chat window. You can add either of these methods as additional scripts within the code that's automatically generated when you create a deployment.

Note: This isn't applicable for mobile browsers, where chats open to the full page.

setChatWindowHeight
Use the `setChatWindowHeight` method to customize the height of your chat window.

setChatWindowWidth
Use the `setChatWindowWidth` method to customize the width of your chat window.

setChatWindowHeight

Use the `setChatWindowHeight` method to customize the height of your chat window.

Usage

Sets the height in pixels of the chat window that appears to customers. Available in API versions 28.0 and later.

Syntax

```
void setChatWindowHeight(Number height)
```

Parameters

Name	Type	Description	Available Versions
`height`	Number	The height in pixels of your custom chat window.	Available in API versions 28.0 and later.

setChatWindowWidth

Use the `setChatWindowWidth` method to customize the width of your chat window.

Usage

Sets the width in pixels of the chat window that appears to customers. Available in API versions 28.0 and later.

Syntax

```
void setChatWindowWidth(Number width)
```

Parameters

Name	Type	Description	Available Versions
`width`	Number	The width in pixels of your custom chat window.	Available in API versions 28.0 and later.

Customize Chat Buttons with the Deployment APIs

Customize your chat buttons and set how chats start for your customers.

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Each chat button includes code that you place on your website to let customers start a chat. Chat automatically handles the button's availability based on your agents' availability and your org's settings. It also handles starting the chat request from the button.

Use the following deployment methods to customize your chat buttons and starting chats. You can add any of these methods as additional scripts within the code that's automatically generated when you create a deployment.

showWhenOnline
Use the `showWhenOnline` method to specify what customers see when a particular button is online.

showWhenOffline
Use the `showWhenOffline` method to specify what customers see when a particular button is offline.

addButtonEventHandler
Use the `addButtonEventHandler` method to define a chat button's behavior when certain events occur. Available in API versions 28.0 and later

startChat
Use the `startChat` method to request a chat from a button in a new window.

startChatWithWindow
Use the `startChatWithWindow` method to request a chat from a button using the name of a window.

Corresponding Calls for Chat Buttons
Make sure your chats start correctly by aligning your calls when using buttons, direct-to-agent, and agent with fallback-to-button.

showWhenOnline

Use the `showWhenOnline` method to specify what customers see when a particular button is online.

Usage

Displays a particular element when the specified button, agent, or agent-with-fallback-button is online. Available in API versions 28.0 and later.

Syntax

For a button, `userId` is optional: `void showWhenOnline(String buttonId, Object element, (optional) String userId)`

For an agent, use `userId` instead of `buttonId`: `void showWhenOnline(String userId, Object element)`

For an agent with fallback-to-button, use both IDs (the element shows when either the agent or button is online): `void showWhenOnline(String buttonId, Object element, String userId)`

Note: Any time you use both a `buttonId` and a `userId`, `buttonId` must appear first.

Parameters

Name	Type	Description	Available Versions
`buttonId`	String	The ID of the chat button for which to display the specified `element` object when agents that are associated with the button are available to chat.	Available in API versions 28.0 and later

Name	Type	Description	Available Versions
`element`	Object	The element to be displayed when the specified button is online.	Available in API versions 28.0 and later
`userId`	String	The ID of the agent to associate with the button. The `element` object is displayed when that agent is available.	Available in API versions 28.0 and later

If you specify a button ID but not a user ID in your parameters, the element is displayed only if the button is online.

If you specify a user ID but not a button ID, the element is displayed only if the agent is online. For example, the following syntax tracks an agent's online status and sets the button to online when that agent is available and offline if unavailable.

```
liveagent.showWhenOnline('005xx000001Sv1m',
document.getElementById('liveagent_button_toAgent_online'));
```

If you specify a button ID and an agent ID, the element is displayed if either the button or the agent is online. For example, the following syntax tracks the status of an agent and a button and displays the element if at least one skilled agent is available.

```
liveagent.showWhenOnline('573xx0000000006',
document.getElementById('liveagent_button_online_573xx0000000006_USER1'), '005xx000001Sv1m');
```

showWhenOffline

Use the `showWhenOffline` method to specify what customers see when a particular button is offline.

Usage

Displays a particular element when the specified button, agent, or agent-with-fallback-button is offline. Available in API versions 28.0 and later

Syntax

For a button, `userId` is optional: **`void`** `showWhenOffline(`**`String`** `buttonId, `**`Object`** `element, (optional)` **`String`** `userId)`

For an agent, use `userId` instead of `buttonId`: **`void`** `showWhenOffline(`**`String`** `userId, `**`Object`** `element)`

For an agent with fallback-to-button, use both IDs (the element shows when either the agent or button is offline): **`void`** `showWhenOffline(`**`String`** `buttonId, `**`Object`** `element, `**`String`** `userId)`

Note: Any time you use both a `buttonId` and a `userId`, `buttonId` must appear first.

Parameters

Name	Type	Description	Available Versions
`buttonId`	String	The ID of the chat button for which to display the specified `element` object when no agents are available to chat.	Available in API versions 28.0 and later

Name	Type	Description	Available Versions
`element`	Object	The element to display when the specified button is offline.	Available in API versions 28.0 and later
`userId`	String	The ID of the agent to associate with the button. The `element` object is displayed when that agent is unavailable.	Available in API versions 28.0 and later

If you specify a button ID but not a user ID in your parameters, the element displays only if the button is offline.

If you specify a user ID but not a button ID, the element displays only if the agent is offline. For example, the following syntax tracks an agent's online status and sets the button to offline when that agent is unavailable.

```
liveagent.showWhenOffline('005xx000001Sv1m',
document.getElementById('liveagent_button_toAgent_offline'));
```

If you specify a button ID and an agent ID, the element displays if neither the button or the agent is available. For example, the following syntax tracks the status of an agent and a button and displays the element if neither one is available.

```
liveagent.showWhenOffline('573xx0000000006',
document.getElementById('liveagent_button_offline_573xx0000000006_USER1'),
'005xx000001Sv1m');
```

addButtonEventHandler

Use the `addButtonEventHandler` method to define a chat button's behavior when certain events occur. Available in API versions 28.0 and later

Usage

Defines the behavior for a chat button when the following events occur:

- An agent is available to chat.
- No agents are available to chat.

The event "no agents are available to chat" occurs whenever a chat can't reach an agent using the configured chat button. The event occurs when:

- No agents are online.
- No agents assigned to the skills associated with the button are online.
- Online agents have the status **Away**.
- Online agents are at capacity (set with Chat Configurations, or Presence Configurations with Omni-Channel).
- Online agents are using Omni-Channel and are only available for other service channels.

Syntax

```
void addButtonEventHandler(String buttonId, Function callback)
```

Parameters

Name	Type	Description	Available Versions
`buttonId`	String	The ID of the chat button for which to define the behavior when certain events occur.	Available in API versions 28.0 and later
`callback`	function	The function to call when a particular event occurs. You must specify the button's behavior for each of the required event types on page 14.	Available in API versions 28.0 and later

Event Types

Incorporate the following event types into your `callback` function to customize the behavior of your button when certain events occur. You must specify the button's behavior for each of the following event types.

Function	Event Type	Syntax	Description
`callback`	BUTTON_AVAILABLE	`liveagent.BUTTON_EVENT.BUTTON_AVAILABLE`	Specifies the behavior of the button when the criteria are met for customers to be able to chat with an agent, such as when an agent with the correct skills is available to chat.
	BUTTON_UNAVAILABLE	`liveagent.BUTTON_EVENT.BUTTON_UNAVAILABLE`	Specifies the behavior of the button when no agents are available to chat.

startChat

Use the `startChat` method to request a chat from a button in a new window.

Usage

Requests a chat from the provided button in a new window.

Optionally, you can route chats from a specific button directly to the agent with the `userId` you specify. If the agent is unavailable, you can route the chat to additional agents by specifying whether to fallback to the button's routing rules (`true`) or not (`false`).

Syntax

```
void startChat(String buttonId, (optional) String userId, (optional) Boolean fallback)
```

Parameters

Name	Type	Description	Available Versions
`buttonId`	String	The ID of the chat button for which to request a chat in a new window.	Available in API versions 28.0 and later
(Optional) `userId`	String	The Salesforce user ID of the agent to whom to directly route chats from the button.	Available in API versions 29.0 and later.
(Optional) `fallback`	Boolean	Specifies whether to fall back to the button's routing rules (`true`) or not (`false`) if the agent with the specified `sfdcUserId` is unavailable.	Available in API versions 29.0 and later.

startChatWithWindow

Use the `startChatWithWindow` method to request a chat from a button using the name of a window.

Usage

Requests a chat from the provided button using the provided window name. Available in API versions 28.0 and later.

Syntax

```
void startChatWithWindow(String buttonId, String windowName, (optional) String userId,
(optional) Boolean fallback)
```

Parameters

Name	Type	Description	Available Versions
`buttonId`	String	The ID of the chat button for which to request a chat in a new window.	Available in API versions 28.0 and later.
`windowName`	String	The name of the window.	Available in API versions 28.0 and later.
(Optional) `userId`	String	The Salesforce user ID of the agent to whom to directly route chats from the button.	Available in API versions 29.0 and later
(Optional) `fallback`	Boolean	Specifies whether to fall back to the button's routing rules (`true`) or not (`false`) if the agent with the specified `sfdcUserId` is unavailable.	Available in API versions 29.0 and later

Corresponding Calls for Chat Buttons

Make sure your chats start correctly by aligning your calls when using buttons, direct-to-agent, and agent with fallback-to-button.

Keep in mind that the syntax for `startChat` also applies to `startChatWithWindow`, and the syntax for `showWhenOnline` also applies to `showWhenOffline`.

Use the following corresponding calls when you're creating chats with a button, direct-to-agent, and agent with fallback-to-button:

Scenario	Call to startChat (or startChatWithWindow)	Call to showWhenOnline (or showWhenOffline)	Call to addButtonEventHandler
Button	`startChat(String buttonId)`	`showWhenOnline(String buttonId, Object element, (optional) String userId)`	`addButtonEventHandler(String buttonId, Function callback)`
Agent (no fallback)	`startChat(String buttonId, String userId, false)`	`showWhenOnline(String userId, Object element)`	`addButtonEventHandler(String userId, Function callback)`
Agent (fallback to button)	`startChat(String buttonId, String userId, true)`	`showWhenOnline(String buttonId, Object element, String userId)`	Use multiple handlers.

Find and Create Records Automatically with the Deployment APIs

Use the Deployment API to search for or create Salesforce records—like a case, contact, account, or lead—automatically when an agent begins a chat with a customer.

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.

You can add any of these methods as additional scripts within the code that's automatically generated when you create a deployment.

addCustomDetail

Use the `addCustomDetail` method to add custom details for each chat visitor.

findOrCreate

Use the findOrCreate method to find existing records or create records based on certain criteria.

setName

Use the `setName` method to set the visitor name displayed in the Chat console or the Salesforce console.

Search for Knowledge Articles with the Deployment APIs

Use the Deployment API to search for Knowledge articles based on the information that a customer provides in a pre-chat form.

Find and Create Records Deployment API Code Sample

Test and preview how automatically creating records can work with your Chat deployments using this code sample.

addCustomDetail

Use the `addCustomDetail` method to add custom details for each chat visitor.

Usage

Adds a new custom detail for the chat visitor. The Custom Detail is displayed to agents in the footer widget and in the Chat Details page in the Salesforce Console while the chat is active. Available in API versions 28.0 and later.

Syntax

```
addCustomDetail(String label, String value, (optional) Boolean displayToAgent)
```

Parameters

Name	Type	Description	Available Versions
`label`	String	The label for the custom detail—for example, `"Name"`.	Available in API versions 28.0 and later.
`value`	String	The value of the custom detail—for example, `"John Doe"`.	Available in API versions 28.0 and later.
(Optional) `displayToAgent`	Boolean	Specifies whether to display the custom details that customers provide in a pre-chat form to the agent (`true`) or not (`false`).	Available in API versions 29.0 and later.

findOrCreate

Use the findOrCreate method to find existing records or create records based on certain criteria.

Usage

Finds or creates a record of the specified type when a chat is routed by Omni-Channel or when an agent accepts a chat request that is routed by Live Agent routing. For chats routed by Omni-Channel, the findOrCreate code triggers even if the chat visitor cancels the chat before the agent accepts. For chats routed by Live Agent routing, the code triggers only when an agent accepts the chat request.

Note: The findOrCreate method begins the API call that finds existing records or create records when an agent begins a chat with a customer. Use this method before calling any of the other findOrCreate submethods for finding or creating records with the Deployment API.

Available in API versions 29.0 and later.

Limitations

For security reasons, this API is disabled by default on new orgs. You can enable this feature from the Chat Settings page in Setup. This page also allows you to create an allowlist for allowed objects.

Note: If this feature is enabled and no objects are selected in the allowlist, all valid objects are allowed.

Implement the findOrCreate call in an agent session and not a bot session. If findOrCreate matches multiple records, the agent can choose which record to attach but the bot doesn't have a way of doing that.

Other limitations:

- For find, we don't allow finding profiles or permission sets.
- For create, we don't allow creating profiles or permission sets.

Syntax

```
liveagent.findOrCreate(String EntityName)
```

Parameters

Name	Type	Description	Available Versions
`EntityName`	String	The type of record to search for or create when an agent accepts a chat with a customer—for example, a contact record.	Available in API versions 29.0 and later.

findOrCreate.map

Use the `findOrCreate.map` method to search for or create records that contain specific customer details.

findOrCreate.saveToTranscript

Use the findOrCreate.saveToTranscript method to save the record you find or create to the chat transcript associated with the chat.

findOrCreate.showOnCreate

Use the `findOrCreate.showOnCreate` method to automatically open the record you create in a subtab in the Salesforce console.

findOrCreate.linkToEntity

Use the findOrCreate.linkToEntity method to link the record you found or created to another record type.

findOrCreate.map

Use the `findOrCreate.map` method to search for or create records that contain specific customer details.

Usage

Searches for or creates records that contain customer data specified by the `addCustomDetail` Deployment API method. This method maps the value of the custom details to the fields on the specified record in the Salesforce console.

You can call the `findOrCreate.map` method as many times as necessary to find the appropriate records. Call the method once for every field and its corresponding custom detail value you want to search for.

Implement the `findOrCreate.map` call in an agent session and not a bot session. If `findOrCreate.map` matches multiple records, the agent can choose which record to attach but the bot doesn't have a way of doing that.

Available in API versions 29.0 and later.

Syntax

```
liveagent.findOrCreate(Object EntityName).map(String FieldName, String DetailName,
Boolean doFind, Boolean isExactMatch, Boolean doCreate)
```

Parameters

Name	Type	Description	Available Versions
`FieldName`	String	The API name of the field in the record `EntityName`to which to map the corresponding custom detail `DetailName`.	Available in API versions 29.0 and later.
`DetailName`	String	The value of the custom detail to map to the corresponding field `FieldName`.	Available in API versions 29.0 and later.
`doFind`	Boolean	Specifies whether to search for a record that contains the custom detail `DetailName` in the field `FieldName` (`true`) or not (`false`).	Available in API versions 29.0 and later.
`isExactMatch`	Boolean	Specifies whether to search for a record that contains the exact value of the custom detail `DetailName` you specified in the field `FieldName` (`true`) or not (`false`).	Available in API versions 29.0 and later.
`doCreate`	Boolean	Specifies whether to create a new record with the custom detail `DetailName` in the field `FieldName` if one isn't found (`true`) or not (`false`).	Available in API versions 29.0 and later.

findOrCreate.saveToTranscript

Use the findOrCreate.saveToTranscript method to save the record you find or create to the chat transcript associated with the chat.

Usage

Saves the record that you found or created using the findOrCreate and findOrCreate.map Deployment API methods to the chat transcript associated with the chat.

Available in API versions 29.0 and later.

Syntax

```
liveagent.findOrCreate(String EntityName).saveToTranscript(String TranscriptFieldName)
```

Parameters

Name	Type	Description	Available Versions
`TranscriptFieldName`	String	The name of the field on the chat transcript record to which to save the ID of the record you found or created.	Available in API versions 29.0 and later.

findOrCreate.showOnCreate

Use the `findOrCreate.showOnCreate` method to automatically open the record you create in a subtab in the Salesforce console.

Usage

Opens the record you created using the `findOrCreate` and `findOrCreate.map` Deployment API methods automatically in a subtab in the to the Salesforce console.

Available in API versions 29.0 and later.

Syntax

```
liveagent.findOrCreate(String EntityName).showOnCreate()
```

findOrCreate.linkToEntity

Use the findOrCreate.linkToEntity method to link the record you found or created to another record type.

Usage

Links the record that you found or created using the findOrCreate on page 17 and findOrCreate.map on page 18 Deployment API methods to another record of a different record type that you created using a separate findOrCreate on page 17 API call. For example, you can link a case record you found within your organization to a contact record you create.

Note: You can only link records if the parent record is created with a findOrCreate API call. You can't link a child record to a record you found using the findOrCreate.linkToEntity on page 20 method.

Available in API versions 29.0 and later.

Syntax

```
liveagent.findOrCreate(String EntityName).linkToEntity(String EntityName, String FieldName)
```

Parameters

Name	Type	Description	Available Versions
`EntityName`	String	The type of record to which to link the child record you found or created.	Available in API versions 29.0 and later.

Name	Type	Description	Available Versions
`FieldName`	String	The name of the API field in the record `EntityName` to which to save the ID of the child record you found or created.	Available in API versions 29.0 and later.

setName

Use the `setName` method to set the visitor name displayed in the Chat console or the Salesforce console.

Usage

Sets the visitor name displayed in the Salesforce console. The name will show in the chat's primary tab, the agent's chat log with the chat transcript, and in the Live Agent Supervisor panel. Available in API versions 28.0 and later.

Syntax

```
setName(String name)
```

Parameters

Name	Type	Description	Available Versions
`name`	String	The visitor name that appears in the Chat console or the Salesforce console.	Available in API versions 28.0 and later.

Search for Knowledge Articles with the Deployment APIs

Use the Deployment API to search for Knowledge articles based on the information that a customer provides in a pre-chat form.

addCustomDetail.doKnowledgeSearch
Use the `knowledgeSearch` method to automatically search for Knowledge articles based on criteria in a pre-chat form.

addCustomDetail.doKnowledgeSearch

Use the `knowledgeSearch` method to automatically search for Knowledge articles based on criteria in a pre-chat form.

Usage

Retrieves a custom detail value from a pre-chat form when a customer requests a chat with an agent. After an agent accepts the chat request, this value is used as a search keyword to find articles in the Knowledge One widget. The `doKnowledgeSearch()` method conducts a search by using the `value` parameter in the `addCustomDetail` method. Available in API version 31.0 and later.

Syntax

```
liveagent.addCustomDetail(String label, String value, (optional) Boolean
displayToAgent).doKnowledgeSearch()
```

Find and Create Records Deployment API Code Sample

Test and preview how automatically creating records can work with your Chat deployments using this code sample.

The following code searches for and creates records when an agent begins a chat with a customer using the following methods:

- addCustomDetail
- findOrCreate
- findOrCreate.map
- findOrCreate.saveToTranscript
- findOrCreate.linkToEntity
- findOrCreate.showOnCreate

```
<script type='text/javascript'>
/* Creates a custom detail called First Name and sets the value to "Jane" */
liveagent.addCustomDetail("First Name", "Jane");

/* Creates a custom detail called Last Name and sets the value to "Doe" */
liveagent.addCustomDetail("Last Name", "Doe");

/* Creates a custom detail called Phone Number and sets the value to "555-1212" */
liveagent.addCustomDetail("Phone Number", "415-555-1212");

/* Creates a custom detail called Case Subject and sets the value to "Best snowboard for
a beginner" and will perform a knowledge search when the chat is accepted for the agent
*/

liveagent.addCustomDetail("Case Subject", "Best snowboard for a
beginner").doKnowledgeSearch();

/* Creates a custom detail called Case Status and sets the value to "New" */
liveagent.addCustomDetail("Case Status", "New");

/* This does a non-exact search on cases by the value of the "Case Subject" custom detail.

 If no results are found, it will create a case and set the case's subject and status
 The case that's found or created will be associated to the chat and the case will open
in
 the Console for the agent when the chat is accepted */
liveagent.findOrCreate("Case").map("Subject","Case
Subject",true,false,true).map("Status","Case
Status",false,false,true).saveToTranscript("CaseId").showOnCreate();

/* This searches for a contact whose first and last name exactly match the values in the
custom details for First and Last Name
 If no results are found, it will create a new contact and set it's first name, last name,
 and phone number to the values in the custom details */
liveagent.findOrCreate("Contact").map("FirstName","First
```

```
Name",true,true,true).map("LastName","Last Name",true,true,true).map("Phone","Phone
Number",false,false,true);

/* The contact that's found or created will be saved or associated to the chat transcript.
The contact will be opened for the agent in the Console and the case is linked to the
contact record */
liveagent.findOrCreate("Contact").saveToTranscript("ContactId").showOnCreate().linkToEntity("Case","ContactId");
</script>
```

Customize Automated Chat Invitations with the Deployment APIs

Customize automated chat invitations that appear to customers on your website.

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.

Use the following deployment methods to customize your automated chat invitations.

setCustomVariable
Use the `setCustomVariable` method to create customized criteria in your sending rules that must be met in order for your automated invitation to be sent to customers.

rejectChat
Use the `rejectChat` method to reject and retract an invitation that's been sent to a customer.

addButtonEventHandler
Use the `addButtonEventHandler` method to define an automated invitation's behavior when certain events occur.

Automated Chat Invitation Code Sample
Test and preview how automated chat invitations can work on your website using this code sample.

setCustomVariable

Use the `setCustomVariable` method to create customized criteria in your sending rules that must be met in order for your automated invitation to be sent to customers.

Usage

Creates customized criteria in your sending rules that must be met in order for your automated invitation to be sent to customers. Specifies the comparison values for custom variables used in criteria for your sending rules. Available in API versions 28.0 and later.

Syntax

```
void setCustomVariable(String variableName, Object value)
```

Parameters

Name	Type	Description	Available Versions
`variableName`	String	The name of the customized criteria for your custom sending rule.	Available in API versions 28.0 and later.
`value`	Object	The comparison value for your custom sending rule.	Available in API versions 28.0 and later.

rejectChat

Use the `rejectChat` method to reject and retract an invitation that's been sent to a customer.

Usage

Rejects an invitation and causes it to be retracted.

Available in API versions 28.0 and later.

Syntax

```
void rejectChat(String buttonId)
```

Parameters

Name	Type	Description	Available Versions
`buttonId`	String	The ID of the chat button for which to reject chats.	Available in API versions 28.0 and later.

addButtonEventHandler

Use the `addButtonEventHandler` method to define an automated invitation's behavior when certain events occur.

Usage

Defines the behavior for an invitation when the following events occur:

- The criteria are met for the invitation to appear on-screen.
- The criteria are not met for the invitation to appear on-screen.
- A customer accepts an invitation to chat.
- A customer rejects an invitation to chat.

The event "the criteria are not met for the invitation to appear on the screen" occurs when a chat can't reach an agent using the configured chat button or automated invitation. The event occurs when:

- No agents are online.
- No agents assigned to the skills associated with the button are online.

- Online agents have the status **Away**.
- Online agents are at capacity (set with Chat Configurations, or Presence Configurations with Omni-Channel).
- Online agents are using Omni-Channel and are only available for other service channels.

Available in API versions 28.0 and later.

Syntax

```
void addButtonEventHandler(String buttonId, Function callback)
```

Parameters

Name	Type	Description	Available Versions
`buttonId`	String	The ID of the chat button associated with the automated invitation for which to define the behavior when certain events occur.	Available in API versions 28.0 and later.
`callback`	function	The function to call when a particular event occurs. You must specify the invitation's behavior for each of the required event types on page 25.	Available in API versions 28.0 and later.

Event Types

Incorporate the following event types into your `callback` function to customize the behavior of your invitation when certain events occur. You must specify the invitation's behavior for each of the following event types.

Function	Event Type	Syntax	Description
`callback`	BUTTON_AVAILABLE	`liveagent.BUTTON_EVENT.BUTTON_AVAILABLE`	Specifies the behavior of the automated invitation when the criteria are met for the invitation to appear on-screen.
	BUTTON_UNAVAILABLE	`liveagent.BUTTON_EVENT.BUTTON_UNAVAILABLE`	Specifies the behavior of the automated invitation when the criteria are not met for the invitation to appear on-screen.
	BUTTON_ACCEPTED	`liveagent.BUTTON_EVENT.BUTTON_ACCEPTED`	Specifies the behavior of the automated invitation when a

Function	Event Type	Syntax	Description
			customer accepts the invitation. This event type is only available for automated chat invitations.
	BUTTON_REJECTED	`liveagent.BUTTON_EVENT.BUTTON_REJECTED`	Specifies the behavior of the automated invitation when a customer rejects the invitation. This event type is only available for automated chat invitations.

Note: You might receive multiple events of the same type.

Automated Chat Invitation Code Sample

Test and preview how automated chat invitations can work on your website using this code sample.

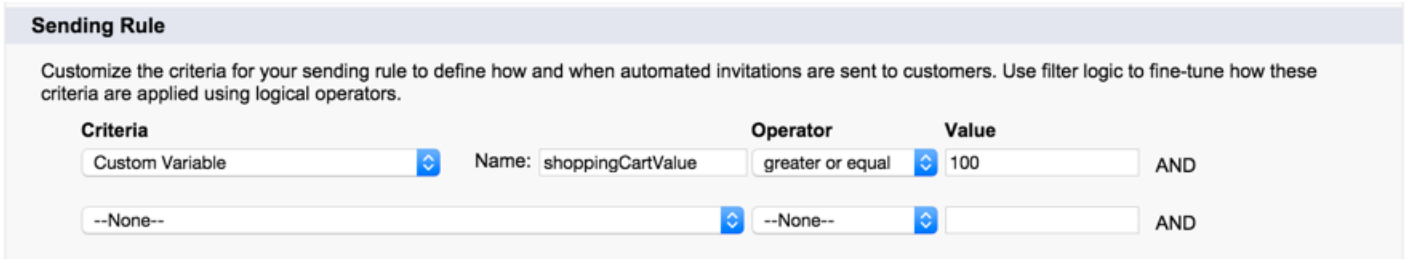
The following code is for an automated chat invitation that uses the `addButtonEventHandler()` method to display a customized invitation on a website. This invitation allows customers to start a chat with an agent when an agent with the correct skills is available to chat.

```
<apex:page>

<!-- This section creates the div with the UI for chat invitation whose id is 573D01234567890
 -->
<!-- For this usage, the "Animation" type of this invitation should be set to "Custom",
otherwise two invitations will appear (the Salesforce-provided one and this custom one).
-->
<div id="liveagent_invite_button_573D01234567890" style="display: none; position: fixed;
border: 2px solid darkblue; border-radius: 5px; background-color: lightblue; height: 100px;
 width: 200px;">
 <!-- Creates an "X" option to reject or close the invitation if it's offered  -->
 <div style="cursor: pointer; padding: 5px; right: 0px; position: absolute; color: darkred;
 font-weight: bold;" onclick="liveagent.rejectChat('573D01234567890')">X</div>
<!-- Provides the Start Chat option for the customer to accept or start the chat for the
invitation  -->
<div style="cursor: pointer; top: 42px; left: 65px; position: absolute;font-weight: bold;
 font-size: 16px;" onclick="liveagent.startChat('573D01234567890')">Start Chat</div>
</div>

<!-- Chat Deployment Code that makes chat available -->
<script type='text/javascript'
```

```
src='https://MyDomainName.my.salesforce-scrt.com/content/g/js/36.0/deployment.js'></script>

<script type='text/javascript'>
 // Creates the callback function used for the Chat invitation to present it or not based
 on availability and the customer's interaction with it
 function buttonCallback(e) {

  // When the chat invitation is online (i.e. at least one available, skilled agent),
display it at position top 200px and left 300px   if (e ==
liveagent.BUTTON_EVENT.BUTTON_AVAILABLE) {
  document.getElementById('liveagent_invite_button_573D01234567890').style.display = '';
  document.getElementById('liveagent_invite_button_573D01234567890').style.left = '300px';

  document.getElementById('liveagent_invite_button_573D01234567890').style.top = '200px';

  }

  // When the chat invitation is offline, don't display it
  if (e == liveagent.BUTTON_EVENT.BUTTON_UNAVAILABLE) {
  document.getElementById('liveagent_invite_button_573D01234567890').style.display = 'none';

  }

  // When the chat invitation is accepted, stop displaying it   if (e ==
liveagent.BUTTON_EVENT.BUTTON_ACCEPTED) {
  document.getElementById('liveagent_invite_button_573D01234567890').style.display = 'none';

  }

  // When the chat invitation is rejected, stop displaying it   if (e ==
liveagent.BUTTON_EVENT.BUTTON_REJECTED) {
  document.getElementById('liveagent_invite_button_573D01234567890').style.display = 'none';

  }
 }

 // Registers the function buttonCallback() above as the callback for the chat invitation
 whose id is 573D01234567890  liveagent.addButtonEventHandler('573D01234567890',
buttonCallback);

 // Let's say there is data available in JavaScript that you want to use in a custom sending
 rule.
 var shoppingCartValue = 123.45;
 // To pass this data so it can be used in Sending Rules in Salesforce setup, call
setCustomVariable.
 liveagent.setCustomVariable('shoppingCartValue', shoppingCartValue);

 // Chat deployment code that initializes chat for the deployment whose id is 572D01234567890
 and org is 00DD01234567890
 liveagent.init('https://MyDomainName.my.salesforce-scrt.com/chat', '572D01234567890',
'00DD01234567890');

 // Enable Chat advanced logging to be available through the Browser's Developer Console
```

```
 liveagent.enableLogging();
</script>

</apex:page>
```

This code lets you pass data that's available in JavaScript so it can be used in your invitation's sending rules in Setup. This is an example of how your settings might look:



Deployment API Code Sample

Test and preview how the Deployment API can help you customize your deployments.

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.

Chat Window

This code sample creates a chat window that uses the following Deployment API methods:

- `startChat`
- `showWhenOnline`
- `showWhenOffline`
- `addCustomDetail`
- `setName`
- `map`
- `setChatWindowWidth`
- `setChatWindowHeight`
- `doKnowledgeSearch`

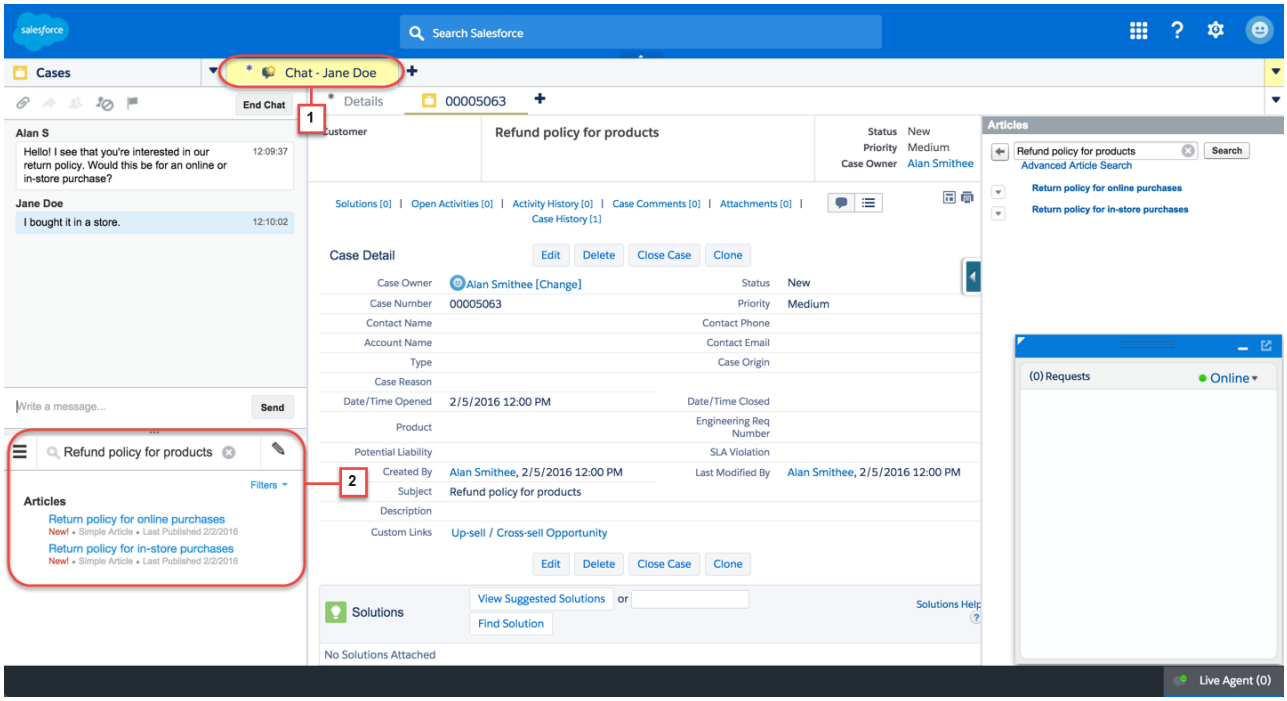
Warning: Details added via the Deployment API are associated with the Visitor. When a chat is launched, the Chasitor is associated with the initial visitor. A subsequent request is a new Chasitor associated with the same visitor. To create details associated with only one Chasitor, the Prechat API must be used instead.

```
<apex:page showHeader="false">
<style> body { margin: 25px 0 0 25px; } </style>

<h1>Welcome to Support</h1>
```

```
<br />
Thank you for your interest.
<br /><br />

<!-- START Button code, Replace this section with your Chat button code snippet -->
<a id="liveagent_button_online_573B0000000033Y" href="javascript://Chat" style="display:
none;" onclick="liveagent.startChat('573B0000000033Y')">Chat Now</a>
<div id="liveagent_button_offline_573B0000000033Y" style="display: none;">Chat is currently
 unavailable</div>
<script type="text/javascript">
    if (!window._laq) { window._laq = []; }
    window._laq.push(function(){
        liveagent.showWhenOnline('573B0000000033Y',
document.getElementById('liveagent_button_online_573B0000000033Y'));
        liveagent.showWhenOffline('573B0000000033Y',
document.getElementById('liveagent_button_offline_573B0000000033Y'));
});</script>

<!-- END Button code -->

<!-- Chat Deployment Code, replace with your org's values -->
<script type='text/javascript'
src='https://c.la.gus.salesforce.com/content/g/js/36.0/deployment.js'></script>

<!-- Deployment Code API examples -->
<script type='text/javascript'>
/* Adds a custom detail called Contact Email and sets it value to jane@doe.com */
liveagent.addCustomDetail('Contact E-mail', 'jane@doe.com');

/* Creates a custom detail called First Name and sets the value to Jane */
liveagent.addCustomDetail('First Name', 'Jane');

/* Creates a custom detail called Last Name and sets the value to Doe */
liveagent.addCustomDetail('Last Name', 'Doe');

/* Creates a custom detail called Phone Number and sets the value to 415-555-1212 */
liveagent.addCustomDetail('Phone Number', '415-555-1212');

/* An auto-query that searches Contacts whose Email field exactly matches 'jane@doe.com'.
 If no result is found, it will create a Contact record with the email, first name, last
name, and phone number fields set to the custom detail values. */
liveagent.findOrCreate('Contact').map('Email','Contact
E-mail',true,true,true).map('FirstName','First Name',false,false,true).map('LastName','Last
 Name',false,false,true).map('Phone','Phone Number',false,false,true);

/* The contact that's found or created will be saved or associated to the chat transcript.
 The contact will be opened for the agent in the Console and the case is linked to the
contact record */
liveagent.findOrCreate('Contact').saveToTranscript('ContactId').showOnCreate().linkToEntity('Case','ContactId');

/* Creates a custom detail called Case Subject and sets the value to 'Refund policy for
products' and will perform a knowledge search when the chat is accepted for the agent */
liveagent.addCustomDetail('Case Subject','Refund policy for products').doKnowledgeSearch();
```

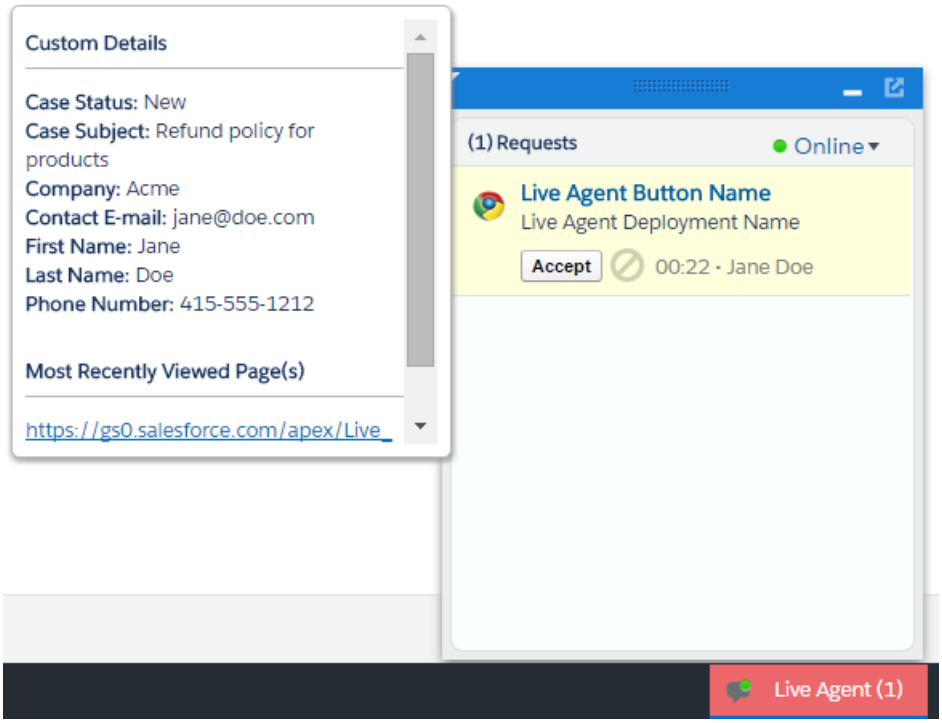
```
/* Creates a custom detail called Case Status and sets the value to 'New' */
liveagent.addCustomDetail('Case Status','New');

/* This does a non-exact search on cases by the value of the 'Case Subject' custom detail
 If no results are found, it will create a case and set the case's subject and status.
The case that's found or created will be associated to the chat and the case will open in
 the Console for the agent when the chat is accepted */
liveagent.findOrCreate('Case').map('Subject','Case
Subject',true,false,true).map('Status','Case
Status',false,false,true).saveToTranscript('CaseId').showOnCreate();

/* Saves the custom detail to a custom field on LiveChatTranscript at the end of a chat.
 Assumes a custom field called Company__c was added to the Live Chat Transcript object */
liveagent.addCustomDetail('Company', 'Acme').saveToTranscript('Company__c');

/* For internal or technical details that don't concern the agent, set showToAgent to false
 to hide them from the display. */
liveagent.addCustomDetail('VisitorHash', 'c6f440178d478e4326a1', false);

/* Sets the display name of the visitor in the agent console when engaged in a chat */
liveagent.setName('Jane Doe');

/* Sets the width of the chat window to 500px */
liveagent.setChatWindowWidth(500);

/* Sets the height of the chat window to 500px */
liveagent.setChatWindowHeight(500);

<!-- Chat Deployment Code to initialize, replace with your org's values -->
liveagent.init('https://d.la.gus.salesforce.com/chat', '572B000000003KL', '00DB00000000Rr8');
</script>
</apex:page>
```

This code results in the following view for agents using the Console.



The name of the customer (Jane Doe for this example) appears in the Console from setName (1). When you call addCustomDetail.doKnowledgeSearch, the search automatically appears in the Knowledge widget (2).

When the agent receives a chat, the set Custom Details appear in a hover window.



Optional Cookies

You can use your consent manager to provide users the ability to opt in or opt out of optional cookies. If they choose to opt in you can pass `true` to the fourth parameter in `liveagent.init()` to enable tracking optional cookies. Otherwise, if they choose to opt out, pass false. Omitting the fourth parameter is the same as passing true.

Note: The ability to provide opt-out from optional cookies is supported in version 52.0 and later of the Deployment API.

```
/* Enable optional cookies*/
liveagent.init('https://d.la.gus.salesforce.com/chat', '572B000000003KL', '00DB00000000Rr8',
 true);
liveagent.init('https://d.la.gus.salesforce.com/chat', '572B000000003KL', '00DB00000000Rr8');

/* Disable optional cookies */
liveagent.init('https://d.la.gus.salesforce.com/chat', '572B000000003KL', '00DB00000000Rr8',
 false);
```

If the user opts out, you can also call `liveagent.disableOptionalCookies()`. This deletes and stops tracking the optional cookies. This is the same as passing `false` to `liveagent.init()` except that it takes higher order of precedence than `liveagent.init()` with the value true. For example, if you call `liveagent.disableOptionalCookies()` first and then pass true to `liveagent.init()`, optional cookies are still disabled. Unlike `liveagent.init()`, `liveagent.disableOptionalCookies()` can also be called anytime after the page is loaded.

```
/* Disable optional cookies.*/
liveagent.disableOptionalCookies()
```

If the user opts back in to optional cookies after opting out, pass `true` to `liveagent.init()` on the next page load.

```
<apex:page showHeader="false">
<style> body { margin: 25px 0 0 25px; } </style>

...

<!-- Chat Deployment Code to initialize, replace with your org's values -->
/* To enable tracking optional cookies, pass `true` to the fourth parameter. To disable
them, pass `false` to the fourth parameter or call liveagent.disableOptionalCookies().*/
liveagent.init('https://d.la.gus.salesforce.com/chat', '572B000000003KL',
'00DB00000000Rr8',true);
</script>
</apex:page>
```

CHAPTER 5 Use Pre-Chat to Gather Visitor Information and Set Context for the Agent

Use pre-chat forms in to collect information from visitors and customize their pre-chat experience.

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.

A pre-chat form can gather information, such as a customer's name, email address, and reason for contacting customer support. This information can help direct chat requests more efficiently and reduce the time agents spend collecting the information themselves. You can also use this information to customize the customer's experience while they chat with the agent, such as including their first name in the chat window.

You can create a Visualforce page to host your pre-chat form, or you can develop the form on your own. The information in this guide focuses on using Visualforce.

Find and Create Records Automatically with the Pre-Chat APIs

Use the Pre-Chat API to search for or create customer records automatically when a customer completes a pre-chat form.

Access Chat Details with the Pre-Chat APIs

Use the Pre-Chat API to access custom details from the Deployment API and incorporate them into pre-chat.

Find and Create Records Automatically with the Pre-Chat APIs

Use the Pre-Chat API to search for or create customer records automatically when a customer completes a pre-chat form.

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.

findOrCreate.map

Use the `findOrCreate.map` method to search for or create records that contain specific customer details.

findOrCreate.saveToTranscript

Use the findOrCreate.saveToTranscript method to find or create a record and save it to the chat transcript associated with the chat.

findOrCreate.showOnCreate

Use the `findOrCreate.showOnCreate` method to find or create a record and automatically open it in a subtab in the Salesforce console.

findOrCreate.linkToEntity

Use the findOrCreate.linkToEntity method to link the record you found or created to another record type.

findOrCreate.displayToAgent

Use the `findOrCreate.displayToAgent` method to specify which pre-chat details will be displayed to agents for incoming chats in the widget and in the Details tab when they receive a chat request.

Find and Create Records Pre-Chat API Code Sample

Test and preview how to automatically create records when a customer completes a pre-chat form using this code sample.

findOrCreate.map

Use the `findOrCreate.map` method to search for or create records that contain specific customer details.

Usage

Searches for or creates records that contain the customer data that's specified in the pre-chat form that the customer completes. This method maps the value of the custom details to the fields on the specified record in the Salesforce console.

You can call the `findOrCreate.map` method as many times as necessary to find the appropriate records. You can list multiple fields and their corresponding details to map the detail values to the appropriate fields within the record.

Available in API versions 29.0 and later.

Syntax

```
<input type= "hidden" name= "liveagent.prechat.findorcreate.map: String entityName"
value= "String fieldName, String detailName;" />
```

Parameters

Name	Type	Description	Available Versions
`entityName`	String	The type of record to search for or create when an agent accepts a chat with a customer, for example, a contact record	Available in API versions 29.0 and later.
`fieldName`	String	The name of the field in the record `EntityName` to which to map the corresponding custom detail `value`	Available in API versions 29.0 and later.
`detailName`	String	The value of the custom detail to map to the corresponding field `fieldName`	Available in API versions 29.0 and later.

findOrCreate.map.doFind

Use the findOrCreate.map.doFind method to specify which fields to search against existing customer records when a customer completes a pre-chat form.

findOrCreate.map.isExactMatch

Use the findOrCreate.map.isExactMatch method to specify whether a field value must exactly match the field value in an existing record when you conduct a search with the findOrCreate.map method.

findOrCreate.map.doCreate

Use the findOrCreate.map.doCreate method to specify which fields in findOrCreate.map method to use to create a new record if an existing record isn't found.

findOrCreate.map.doFind

Use the findOrCreate.map.doFind method to specify which fields to search against existing customer records when a customer completes a pre-chat form.

Usage

Specifies which fields in your findOrCreate.map method to use to search for an existing record. You can search for one or more fields within records, but note that when multiple fields are specified, the logic relationship is AND. This means that all specified fields must match an existing record for it to be found.

When using custom fields, follow these guidelines:

- Checkboxes have valid values `true` and `false` when trying to search or create related to custom fields.
- Dates use the format YYYY-MM-DD.
- Numbers in the Currency field don't have a currency sign.
- Numbers in the Percentage field don't have a percentage sign.

Available in API versions 29.0 and later.

Syntax

```
<input type= "hidden" name= "liveagent.prechat.findorcreate.map.doFind: String
entityName" value= "String fieldName, Boolean find;" />
```

Parameters

Name	Type	Description	Available Versions
`entityName`	String	The type of record to search for or create when an agent accepts a chat with a customer—for example, a contact record.	Available in API versions 29.0 and later.
`fieldName`	String	The name of the API field to search for in existing records.	Available in API versions 29.0 and later.
`find`	Boolean	Specifies whether to search for existing records that contain the field `fieldName` (`true`) or not (`false`).	Available in API versions 29.0 and later.

You can specify only the fields for which `find` equals `true`. The method doesn't search for records containing fields for which `find` equals `false`.

findOrCreate.map.isExactMatch

Use the findOrCreate.map.isExactMatch method to specify whether a field value must exactly match the field value in an existing record when you conduct a search with the findOrCreate.map method.

Usage

Specifies which fields in your findOrCreate.map method require an exact field value match when you search for existing records. You can specify this for one or more fields within records.

Available in API versions 29.0 and later.

Syntax

```
<input type= "hidden" name= "liveagent.prechat.findorcreate.map.isExactMatch: String entityName" value= "String fieldName, Boolean exactMatch;" />
```

Parameters

Name	Type	Description	Available Versions
`entityName`	String	The type of record to search for or create when an agent accepts a chat with a customer—for example, a contact record.	Available in API versions 29.0 and later.
`fieldName`	String	The API name of the field to search for in existing records.	Available in API versions 29.0 and later.
`find`	Boolean	Specifies whether to search for existing records that contain an exact match to the field `fieldName` (`true`) or not (`false`).	Available in API versions 29.0 and later.

To find the API name of a field for a standard object, see our API documentation. For non-standard objects, look at the field detail for the object under **Setup**.

You only need to specify fields for which `exactMatch` equals `true`. The method will not search for records containing fields for which `exactMatch` equals `false`.

findOrCreate.map.doCreate

Use the findOrCreate.map.doCreate method to specify which fields in findOrCreate.map method to use to create a new record if an existing record isn't found.

Usage

Specifies which fields in your findOrCreate.map method to use to create a new record if an existing record isn't found. You can specify one or more fields for creating new records.

Available in API versions 29.0 and later.

Syntax

```
<input type= "hidden" name= "liveagent.prechat.findorcreate.map.doCreate: String entityName" value= "String fieldName, Boolean create;" />
```

Parameters

Name	Type	Description	Available Versions
`entityName`	String	The type of record to create when an agent accepts a chat with a customer and an existing record isn't found—for example, a contact record.	Available in API versions 29.0 and later.
`fieldName`	String	The API name of the field to include in new records. The findOrCreate method begins the API call that finds existing records or create new records when an agent begins a chat with a customer. You must use this method before calling any of the other findOrCreate sub-methods for finding or creating records with the Deployment API.	Available in API versions 29.0 and later.
`create`	Boolean	Specifies whether to create a new record that contains the field `fieldName` (`true`) or not (`false`). You only need to specify fields for which `create` equals `true`. The method will not create records containing fields for which `create` equals `false`.	Available in API versions 29.0 and later.

findOrCreate.saveToTranscript

Use the findOrCreate.saveToTranscript method to find or create a record and save it to the chat transcript associated with the chat.

Usage

Saves the record that you found or created using the findOrCreate.map.doCreate on page 36 or findOrCreate.map.doFind on page 35 Pre-Chat API methods to the chat transcript associated with the chat when the chat ends.

Available in API versions 29.0 and later.

Syntax

```
<input type="hidden" name= "liveagent.prechat.findorcreate.saveToTranscript: String entityName" value= "String transcriptFieldName" />
```

Parameters

Name	Type	Description	Available Versions
`entityName`	String	The type of record to search for or create when an agent accepts a chat with a customer—for example, a contact record.	Available in API versions 29.0 and later.
`transcriptFieldName`	String	The API name of the field on the chat transcript record to which to save the ID of the record you found or created.	Available in API versions 29.0 and later.

findOrCreate.showOnCreate

Use the `findOrCreate.showOnCreate` method to find or create a record and automatically open it in a subtab in the Salesforce console.

Usage

Opens the record you created using the `findOrCreate.map.doCreate` and `findOrCreate.map.doFind` Pre-Chat API methods automatically in a subtab in the to the Salesforce console.

Available in API versions 29.0 and later.

Syntax

```
<input type= "hidden" name= "liveagent.prechat.findorcreate.showOnCreate: String
entityName" value= "Boolean show" />
```

Parameters

Name	Type	Description	Available Versions
`entityName`	String	The type of record to search for or create when an agent accepts a chat with a customer—for example, a contact record.	Available in API versions 29.0 and later.
`show`	Boolean	Specifies whether to display the record you created in a subtab in the Salesforce console (`true`) or not (`false`).	Available in API versions 29.0 and later.

findOrCreate.linkToEntity

Use the findOrCreate.linkToEntity method to link the record you found or created to another record type.

Usage

Links the record you've found or created using the findOrCreate.map.doFind on page 35 and findOrCreate.map.doCreate on page 36 methods to another record of a different record type that you created using a separate findOrCreate.map API call. For example, you can link a case record you found within your organization to a contact record you create.

The findOrCreate.linkToEntity method links the found or created record to one record. If you try to link a found or created record to multiple records, the found or created record is linked only to the first record.

The findOrCreate.linkToEntity method can't be used to populate fields on records that you create by using the findOrCreate on page 17 API call. Instead, use the findOrCreate.map method to update field values on records.

Note: You can only link records if the parent record is created with a findOrCreate API call. You can't link a child record to a record you found using the findOrCreate.linkToEntity method.

Available in API versions 29.0 and later.

Syntax

```
<input type= "hidden" name= "liveagent.prechat.findorcreate.linkToEntity: String
entityName" value= "String parentEntityName, String fieldName" />
```

Parameters

Name	Type	Description	Available Versions
`entityName`	String	The type of record which is linked to the parent record you found or created.	Available in API versions 29.0 and later.
`parentEntityName`	String	The type of parent record to link to the child record you found or created.	Available in API versions 29.0 and later.
`fieldName`	String	The name of the field in the record `parentEntityName` where the ID of the child record you found or created is saved.	Available in API versions 29.0 and later.

findOrCreate.displayToAgent

Use the `findOrCreate.displayToAgent` method to specify which pre-chat details will be displayed to agents for incoming chats in the widget and in the Details tab when they receive a chat request.

Usage

Specifies which pre-chat details to display to an agent in the Details tab in Salesforce console when the agent receives a chat request. Typically, this method is only used to hide particular custom details from the agent but setting its value to `false`.

Available in API versions 29.0 and later.

Syntax

```
<input type= "hidden" name= "liveagent.prechat.findorcreate.displayToAgent: String
detailName" value= "Boolean display" />
```

Parameters

Name	Type	Description	Available Versions
`detailName`	String	The name of the detail to display to an agent when they receive a chat request.	Available in API versions 29.0 and later.
`display`	Boolean	Specifies whether to display the custom detail to an agent in the chat notifications and Details tab (`true`) or not (`false`).	Available in API versions 29.0 and later.

You only need to specify details for which `display` equals `false`. The method will not display details for which `display` equals `false`. If you don't specify the value of the `display` parameter, the default value is set to `true`.

Find and Create Records Pre-Chat API Code Sample

Test and preview how to automatically create records when a customer completes a pre-chat form using this code sample.

The following code searches for and creates records when a customer completes a pre-chat form using the following methods:

- findOrCreate.map
- findOrCreate.map.doFind
- findOrCreate.map.isExactMatch
- findOrCreate.map.doCreate
- findOrCreate.saveToTranscript
- findOrCreate.showOnCreate
- findOrCreate.linkToEntity

```
<form method="post" action="#">
<label>First Name: </label> <input type='text' name='liveagent.prechat:ContactFirstName'
/><br />
<label>Last Name: </label> <input type='text' name='liveagent.prechat:ContactLastName'
/><br />
<label>Subject: </label> <input type='text' name='liveagent.prechat:CaseSubject' /><br />
<input type="hidden" name="liveagent.prechat:CaseStatus" value="New" /><br />
<input type="hidden" name="liveagent.prechat.findorcreate.map:Contact"
value="FirstName,ContactFirstName;LastName,ContactLastName" />
<input type="hidden" name="liveagent.prechat.findorcreate.map.doFind:Contact"
value="FirstName,true;LastName,true" />
<input type="hidden" name="liveagent.prechat.findorcreate.map.isExactMatch:Contact"
value="FirstName,true;LastName,true" />
<input type="hidden" name="liveagent.prechat.findorcreate.map.doCreate:Contact"
value="FirstName,true;LastName,true" />
<input type="hidden" name="liveagent.prechat.findorcreate.saveToTranscript:Contact"
value="ContactId" />
<input type="hidden" name="liveagent.prechat.findorcreate.showOnCreate:Contact" value="true"
 />
<input type="hidden" name="liveagent.prechat.findorcreate.linkToEntity:Contact"
value="Case,ContactId" />
<input type="hidden" name="liveagent.prechat.findorcreate.map:Case"
value="Subject,CaseSubject;Status,CaseStatus" />
```

```
<input type="hidden" name="liveagent.prechat.findorcreate.map.doCreate:Case"
value="Subject,true;Status,true" />
<input type="submit" value="Submit" />
</form>
```

Access Chat Details with the Pre-Chat APIs

Use the Pre-Chat API to access custom details from the Deployment API and incorporate them into pre-chat.

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.

preChatInit
Use the preChatInit method to access the deployment information that has been passed into the chat through the addCustomDetail Deployment API method.

preChatInit

Use the preChatInit method to access the deployment information that has been passed into the chat through the addCustomDetail Deployment API method.

Usage

Extracts chat deployment information, including Custom Details, for use with pre-chat. When you use `preChatInit`, include the prechat.js file in the same Apex page and with the same path as the deployment.js file.

Available in API versions 29.0 and later.

Syntax

```
liveagent.details.preChatInit(String chatUrl, function detailCallback, (optional) String
chatFormName)
```

Parameters

Name	Type	Description	Available Versions
`chatUrl`	String	The URL of the chat to retrieve custom details from.	Available in API versions 29.0 and later.
`detailCallback`	String	Name of the JavaScript function to call upon completion of the method.	Available in API versions 29.0 and later.

Name	Type	Description	Available Versions
(Optional) `chatFormName`	String	The name of the HTML form tag for the pre-chat form to which to incorporate the custom details.	Available in API versions 29.0 and later.

Responses

Name	Type	Description	Available Versions
`details`	Object	An object containing the deployment information included in the pre-chat form using the preChatInit method.	Available in API versions 29.0 and later.

`detailCallback`

The `detailCallback` method specifies the behavior that occurs after the preChatInit method returns the `details` object.

Syntax	Parameters	Description	Available Versions
`function myCallBack(details) { // Customer specific code }`	`details`	Specifies the actions to occur after the custom details are retrieved using the preChatInit method.	Available in API versions 29.0 and later.

CHAPTER 6 Implement a Custom Chat Window Using Visualforce

Chat windows are what visitors use to exchange messages with support agents. Each of your Chat deployments includes a chat window. You can create a customized chat window by using Visualforce, and you can add styling and functionality with HTML, CSS, and JavaScript.

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Einstein Bots doesn't support menus and quick replies in custom Chat windows. To learn more about Einstein Bots Chat channel specifications, see Deploy Your Bot to Channels.

Avoid linking to Salesforce CSS stylesheets when you customize your chat window. They aren't versioned and can change without notice. Instead, we recommend that you use Visualforce components that mimic Salesforce styles instead of directly referencing the stylesheets. That way, you're always in control of how your chat window looks. See Using Styles from Salesforce Stylesheets to lean how to disable our stylesheets.

For more information on using Visualforce, see the Visualforce Developer Guide.

Chat Visualforce Components

Use Visualforce components to customize the appearance and behavior of chat windows.

Chat Visualforce Components Code Sample

Use this code sample to test and preview how Visualforce components can help you customize your chat windows.

Chat Visualforce Components

Use Visualforce components to customize the appearance and behavior of chat windows.

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.

Chat includes the following customizable Visualforce components. These components are placed on your Visualforce form to make certain functionality available and to customize the appearance of the chat window.

Chat windows have various states to inform chat visitors of their chat's progress. The following components let you customize how the chat window looks and behaves in these states to best help your visitors.

Component Name	Description
liveAgent:clientChat	The main parent element for any chat window. This element is necessary to do any additional customization of Chat. This component can only be used once in a Chat deployment.

Component Name	Description
liveAgent:clientChatAlertMessage	The area in a chat window that displays system alert messages (such as "You have been disconnected").
liveAgent:clientChatMessages	The area in a chat window that displays system status messages, such as "Chat session has been disconnected." Must be used within liveAgent:clientChat. Each chat window can have only 1 message area.
liveAgent:clientChatStatusMessage	The area in a chat window that displays system status messages (such as "You are being reconnected").
liveAgent:clientChatQueuePosition	A text label indicating a visitor's position in a queue for a chat session that's initiated by a button that uses push routing. (This component has no effect on buttons that use pull routing.) Must be used within liveAgent:clientChat. For more information on this component, see Using liveAgent:clientChatQueuePosition.
liveAgent:clientChatCancelButton	The button within a chat window when the chat is in a waiting state that allows the visitor to cancel the chat. Must be used within `liveAgent:clientChat`.
liveAgent:clientChatSaveButton	The button in a chat window that a visitor clicks to save the chat transcript as a local file. Must be used within liveAgent:clientChat. Each chat window can have multiple save buttons.
liveAgent:clientChatEndButton	The button within a chat window that a visitor clicks to end a chat session. Must be used within liveAgent:clientChat.
liveAgent:clientChatLog	The area in a chat window that displays the chat conversation to a visitor. Must be used within liveAgent:clientChat. Each chat window can have only 1 chat log.
liveAgent:clientChatInput	The text box in a chat window where a visitor types messages to a support agent. Must be used within liveAgent:clientChat. Each chat window can have only 1 input box.
liveAgent:clientChatSendButton	The button in a chat window that a visitor clicks to send a chat message to an agent. Must be used within liveAgent:clientChat. Each chat window can have multiple send buttons.
liveAgent:clientChatLogAlertMessage	The area in a chat window that displays the idle time-out alert (customer warning) to a visitor.
liveAgent:clientChatFileTransfer	The file upload area in a chat window where a visitor can send a file to an agent. Must be used within liveAgent:clientChat.

For more information about each of these components, see the Visualforce Component Guide.

Using liveAgent:clientChatQueuePosition

The liveAgent:clientChatQueuePosition component shows where in the chat queue a visitor is. In order for a chat to enter the queue:

- The button from which the chat was requested must have queuing enabled.
- All online agents (with the relevant skills, if applicable) must be at capacity, causing a queue to form.
- The chat must be in the queue and not yet assigned to an agent.

If all three of these conditions aren't met, liveAgent:clientChatQueuePosition doesn't display a value.

Chat Visualforce Components Code Sample

Use this code sample to test and preview how Visualforce components can help you customize your chat windows.

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.

The following code sample shows a chat window that uses the following components:

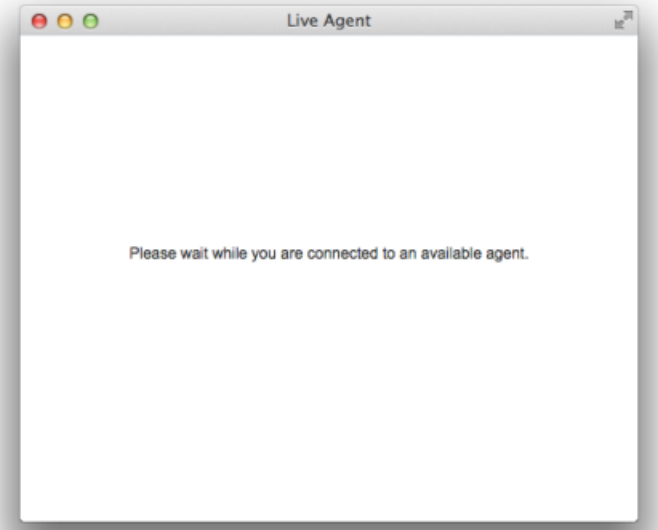
- liveAgent:clientChat
- liveAgent:clientChatMessages
- liveAgent:clientChatEndButton
- liveAgent:clientChatLog
- liveAgent:clientChatInput

```
<apex:page showHeader="false">
<style>
#liveAgentClientChat.liveAgentStateWaiting {
// The CSS class that is applied when the chat request is waiting to be accepted
// See "Waiting State" screenshot below
}
#liveAgentClientChat {
// The CSS class that is applied when the chat is currently engaged
// See "Engaged State" screenshot below
}
#liveAgentClientChat.liveAgentStateEnded {
// The CSS class that is applied when the chat has ended
// See "Ended State" screenshot below
}
body { overflow: hidden; width: 100%; height: 100%; padding: 0; margin: 0 }
#waitingMessage { height: 100%; width: 100%; vertical-align: middle; text-align: center;
display: none; }
#liveAgentClientChat.liveAgentStateWaiting #waitingMessage { display: table; }
#liveAgentSaveButton, #liveAgentEndButton { z-index: 2; }
.liveAgentChatInput {
height: 25px;
border-width: 1px;
border-style: solid;
border-color: #000;
padding: 2px 0 2px 4px;
background: #fff;
display: block;
width: 99%;
}
.liveAgentSendButton {
display: block;
width: 60px;
height: 31px;
```

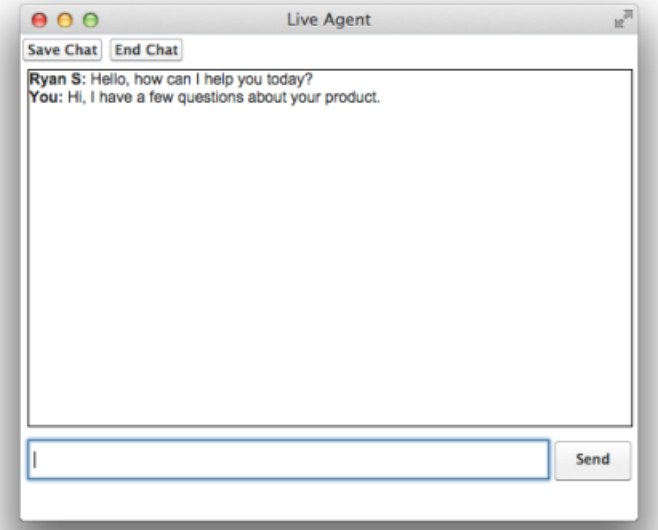
```
padding: 0 0 3px;
position: absolute;
top: 0;
right: -67px;
}
#liveAgentChatLog {
width: auto;
height: auto;
top: 0px;
position: absolute;
overflow-y: auto;
left: 0;
right: 0;
bottom: 0;
}
</style>
<div style="top: 0; left: 0; right: 0; bottom: 0; position: absolute;">
<liveAgent:clientChat>
<liveAgent:clientChatSaveButton />
<liveAgent:clientChatEndButton />
<div style="top: 25px; left: 5px; right: 5px; bottom: 5px; position: absolute; z-index:
0;">
<liveAgent:clientChatAlertMessage />
<liveAgent:clientChatStatusMessage />
<table id="waitingMessage" cellpadding="0" cellspacing="0">
<tr>
<td>Please wait while you are connected to an available agent.</td>
</tr>
</table>
<div style="top: 0; right: 0; bottom: 41px; left: 0; padding: 0; position: absolute;
word-wrap: break-word; z-index: 0;">
<liveAgent:clientChatLog />
</div>
<div style="position: absolute; height: auto; right: 0; bottom: 0; left: 0; margin-right:
67px;">
<liveagent:clientChatInput /><liveAgent:clientChatSendButton />
</div>
</div>
</liveAgent:clientChat>
</div>
</apex:page>
```

For an active chat, this code results in the following chat window states:

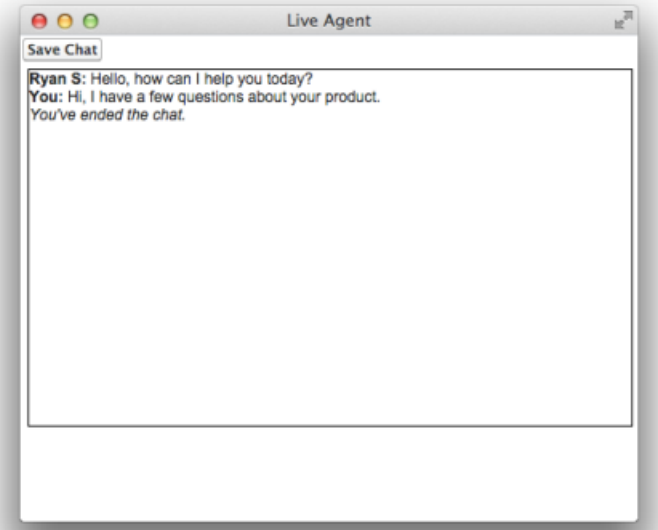
Chat Waiting



Chat in Progress



Chat Ended


Live Agent
Save Chat
Ryan S: Hello, how can I help you today?
You: Hi, I have a few questions about your product.
You've ended the chat.

CHAPTER 7 Use Post-Chat to Wrap Up the Chat Interaction with Your Customer

Post-chat pages let you 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, or forward them to a survey about their chat experience.

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You can create a Visualforce page to host your post-chat page, or you can develop a page on your own and add the URL to your chat button configuration. The information in this guide focuses on using Visualforce.

Post-Chat Code Sample
Test and preview how post-chat pages work for your agents and customers using this code sample.

Post-Chat Code Sample

Test and preview how post-chat pages work for your agents and customers using this code sample.

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You can customize your post-chat page by including the variables you want to be displayed.

Note: If the post-chat page is hosted on a site that requires an active session, long-running chats can lead to session timeout. If the customer is on the post-chat page and is redirected to a login page, the post-chat context variables are lost.

Possible Variables	Description
`requestTime`	The timestamp when the system received the chat request.
`startTime`	The timestamp when the agent accepted the chat.
`deploymentId`	The ID of the deployment.
`buttonId`	The Id of the button that originated the chat.
`chatKey`	The unique chat key.
`lastVisitedPage`	The last visited page value sent to the agent.
`originalReferrer`	The first page the customer visited containing the deployment code.
`latitude`	Geo location latitude of the chat visitor.

Possible Variables	Description
`longitude`	Geo location longitude of the chat visitor.
`city`	Geo location city of the chat visitor.
`region`	Geo location region of the chat visitor.
`country`	Geo location country of the chat visitor.
`organization`	Salesforce organization ID that hosted the chat.
`disconnectedBy`	Reason for ending the chat. Possible values: • `agent` - the agent terminated the chat • `client` - the chat visitor terminated the chat • `error` - the system encountered an error that disconnected the chat • `clientIdleTimeout` - the chat visitor didn't answer within the allotted time (must have Idle Timeout configured) • `agentsUnavailable` - there are no agents available to receive the chat or there is no room in the queue
`windowLanguage`	Language of the window as configured in the chat button.
`chatDetails`	A JSON representation of the chat data.
`transcript`	A plain text copy of the transcript.
`attachedRecords`	A list of IDs attached to the chat session in JSON array format.
`error`	Description of any errors that occurred during the chat.

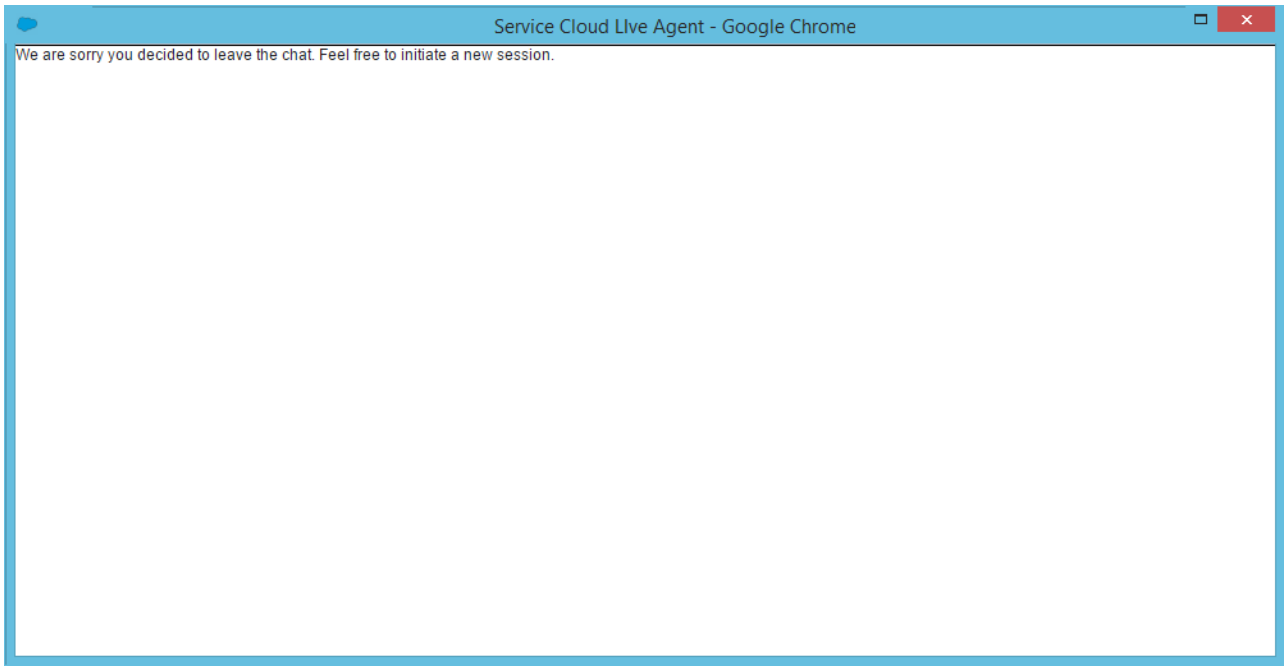
This code sample creates a post-chat page that includes basic information about the chat.

```
<apex:page showHeader='false'>
      <div id='details'>
      <!-- This will present all the post chat parameters available to this page -->
            <h1>Post Chat Page</h1>
            <p>
            <!-- These variables are passed to the post-chat page and can be used to
customize your post-chat experience -->
                  Request Time:  <apex:outputText id='c_rt'
value='{!$CurrentPage.parameters.requestTime}' /><br/>
                  Start Time:  <apex:outputText id='c_st'
value='{!$CurrentPage.parameters.startTime}' /><br/>
                  Deployment Id: <apex:outputText
value='{!$CurrentPage.parameters.deploymentId}' /><br/>
                  Button Id: <apex:outputText value='{!$CurrentPage.parameters.buttonId}'
 /><br/>
                  Chat Key: <apex:outputText value='{!$CurrentPage.parameters.chatKey}'
/><br />
                  Last Visited Page: <apex:outputText
value='{!$CurrentPage.parameters.lastVisitedPage}' /><br/>
```

```
                  Original Referrer: <apex:outputText
value='{!$CurrentPage.parameters.originalReferrer}' /><br/>
                  <!-- When the GeoLocation is not available this will appear as Unknown
-->
                  Latitude: <apex:outputText value='{!$CurrentPage.parameters.latitude}'
/><br/>
                 Longitude: <apex:outputText value='{!$CurrentPage.parameters.longitude}'
 /><br/>
                  City: <apex:outputText value='{!$CurrentPage.parameters.city}' /><br/>
               Region: <apex:outputText value='{!$CurrentPage.parameters.region}' /><br/>

                  Country: <apex:outputText value='{!$CurrentPage.parameters.country}'
/><br/>
                  <!-- End of GeoLocation information -->
                  Organization: <apex:outputText
value='{!$CurrentPage.parameters.organization}' /><br/>
                  Disconnected By: <apex:outputText
value='{!$CurrentPage.parameters.disconnectedBy}' /><br/>
                  Window Language: <apex:outputText
value='{!$CurrentPage.parameters.windowLanguage}' /><br/>
                  Chat Details: <apex:outputText
value='{!$CurrentPage.parameters.chatDetails}' /><br />
              Transcript: <apex:outputText value='{!$CurrentPage.parameters.transcript}'
 /><br/>
                  Attached Records : <apex:outputText
value='{!$CurrentPage.parameters.attachedRecords}' /><br />
                  Error: <apex:outputText value='{!$CurrentPage.parameters.error}' /><br
/>
            </p>
      </div>
      <hr/>
      <!-- Message to show if chat is abandoned -->
      <div id='abandoned' style='display: none;'>
         We are sorry you decided to leave the chat. Feel free to initiate a new session.

      </div>
      <!-- Code to decide if we show the abandoned block or the full data -->
      <script type='text/javascript'>
            var requestTime = '{!$CurrentPage.parameters.requestTime}';
            var startTime = '{!$CurrentPage.parameters.startTime}';
            // when startTime doesn't have a value, it means the chat never started
            if (!startTime) {
                  document.getElementById('details').style.display = 'none';
                  document.getElementById('abandoned').style.display = 'block';
            }
      </script>

</apex:page>
```

This code results in the following post-chat page for the agent:

This message shows if the chat is abandoned:



CHAPTER 8 Set Up Direct-to-Agent Chat Routing with the Deployment APIs

You can route chats that originate from a specific button or invite to a specific agent by editing a few parameters in the Chat Deployment API. You can set chats to fallback to another button or queue if the specified agent isn't available.

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Direct-to-agent routing lets your agents provide visitors with a way to contact them directly. This is useful when a visitor's issue requires a follow-up conversation, because the agent can provide a direct-to-agent link that ensures the visitor won't have to start over with a new agent.

Direct-to-Agent Routing with the Deployment APIs

You can set up direct-to-agent routing that lets you to route chats from a specific button to a single agent.

Fallback Routing in Pre-Chat Forms

Set fallback routing rules in pre-chat forms in case the agent specified for direct-to-agent routing isn't available when a chat is received.

Direct-to-Agent Routing with the Deployment APIs

You can set up direct-to-agent routing that lets you to route chats from a specific button to a single agent.

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Use the following Deployment API methods to set up direct-to-agent routing with fallback routing enabled in case the agent isn't available for chat.

- startChat
- startChatWithWindow
- showWhenOnline
- showWhenOffline

Direct-to-Agent Routing Code Sample

Implement direct-to-agent routing using the Deployment API.

Direct-to-Agent Routing Code Sample

Implement direct-to-agent routing using the Deployment API.

The following code sample shows you how to set up direct-to-agent so your agents can send visitors a "Chat with Me" link.

```
<apex:page standardController="User" showHeader="false">
  <h1>Direct-to-Agent Chat with {!user.name}</h1>

  <!-- dta_online is displayed whenever the specific agent is available to chat. -->
  <div id="dta_online" style="display: none;">

    <!-- A valid button is required here even though it's direct-to-agent - some button
settings still apply. -->
    <!-- {!left(user.id,15)} is needed to truncate an 18-char ID to the 15-char version
that Chat uses. -->
    <a href="javascript://Chat" onclick="liveagent.startChat('573D01234567890',
'{!left(user.id,15)}')">Chat with {!user.name}!</a>

  </div>

  <!-- dta_offline is displayed if the specific agent is unavailable. -->
  <div id="dta_offline" style="display: none;">

    <!-- button_online is displayed if any agents are available to chat for the button.
-->
    <div id="button_online" style="display: none;">Sorry, {!user.name} is not available.
If you&rsquo;d like, you can
      <a href="javascript://Chat" onclick="liveagent.startChat('573D01234567890')">start
a chat with another agent</a>.
    </div>

    <!-- button_offline is displayed if no agents are available to chat for the button.
-->
    <div id="button_offline" style="display: none;">Sorry, all agents (including
{!user.name}) appear to be unavailable.</div>

  </div>

  <!-- Change the live agent pool to the correct one for your org. -->
  <script type='text/javascript'
src='https://LiveAgentPool.salesforceliveagent.com/content/g/deployment.js'></script>

  <script type='text/javascript'>
    /* The following calls pass the user ID as the first argument and show whether the
agent is online.*/
   liveagent.showWhenOnline('{!left(user.id,15)}', document.getElementById('dta_online'));

   liveagent.showWhenOffline('{!left(user.id,15)}', document.getElementById('dta_offline'));


    /* The following calls pass the button ID as the first argument and show whether
    any agents are available to handle chats from the button. */
   liveagent.showWhenOnline('573D01234567890', document.getElementById('button_online'));

   liveagent.showWhenOffline('573D01234567890', document.getElementById('button_offline'));


    /* The live agent pool and these IDs are specific to your org, so replace these with
```

```
your own. */
    liveagent.init('https://LiveAgentPool.salesforceliveagent.com/chat', '572D01234567890',
 '00DD01234567890');
  </script>
</apex:page>
```

When you use this code sample with your org and call it ChatWithMe, agents can create a link that sends a chat request directly to them.

http://your.website/ChatWithMe?id=005D01234567890

You can make it even easier for agents to send a "chat with me" link by creating a Quick Text message that any agent can use:

http://your.website/ChatWithMe?id={!User_ID}

The User ID spot in the link is automatically filled with the User ID of any agent who uses the Quick Text.

Fallback Routing in Pre-Chat Forms

Set fallback routing rules in pre-chat forms in case the agent specified for direct-to-agent routing isn't available when a chat is received.

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What if you set up direct-to-agent routing, but the agent you specified to receive the chats isn't available? If the agent is offline, those chats might be lost.

Luckily, if your organization uses pre-chat forms to gather customer information, you can set up fallback routing options for a button that uses direct-to-agent routing.

This code sample demonstrates how to route chats using another button's default routing rules if the agent assigned to that button isn't available. Let's take a look at this section of code:

```
<h1>Pre-chat Form</h1>
<form method='post' id='prechatForm'>
      Name: <input type='text' name='liveagent.prechat.name' id='prechat_field' /><br />

      Email Address: <input type='text' name='liveagent.prechat:Email' /><br />
      Department: <select name="liveagent.prechat.buttons">
          <!-- Values are LiveChatButton and/or User IDs. -->
          <option value="573D01234567890">Route through button 573D01234567890</option>
          <option value="005D01234567890">Route to agent 005D01234567890</option>
          <option value="005D01234567890_573D01234567890">Route to agent 005D01234567890

          with Fallback to button 573D01234567890</option>
```

In this section, we specify that chats originating from the button should be routed to an agent with agent ID 005xx000001Sv1m. If that agent isn't available, incoming chats are routed based on the default routing rules for the button with button ID 573xx0000000001.

Fallback Routing Code Sample

Implement fallback routing rules in pre-chat forms so visitors can chat with another agent with the specified agent isn't available.

Fallback Routing Code Sample

Implement fallback routing rules in pre-chat forms so visitors can chat with another agent with the specified agent isn't available.

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This sample creates a pre-chat form with fallback routing rules enabled. This form:

- Requests a visitor's name and email address.
- Displays that information in the chat log and in the chat request window.
- Displays either a new or existing Contact record with the customer's information in a new tab in the Salesforce console. The customer's name and email address are used to find an existing record. If no existing record is found, a new record is created and populated with the customer's information.
- Displays a drop-down list that lets visitors choose a different Chat button through which to route their chat request.
- Routes chats directly to a specific agent, or, if that agent is unavailable, routes those chats based on the button's default routing rules.

```
<apex:page showHeader="false">

<!-- This script takes the endpoint URL parameter passed from the deployment page
    and makes it the action for the form -->
<script type="text/javascript">

(function() {
    function handlePageLoad() {
        var endpointMatcher = new RegExp("[\\?\\&]endpoint=([^&#]*)");
        var domainMatcher = new
RegExp("^(https?:\\/\\/(.+?\\.)?(salesforce|salesforceliveagent)\\.com(\\/[A-Za-z0-9\\-\\._~:\\/\\?#\\[\\]@!$&'\\(\\)\*\\+,;\\=]*)?)");


        var endpointAttr = endpointMatcher.exec(document.location.search)[1];
        // if the endpoint domain is valid
        if (domainMatcher.test(decodeURIComponent(endpointAttr))) {
            document.getElementById('prechatForm').setAttribute('action',
                decodeURIComponent(endpointAttr.replace("javascript:", "")));
        } else {
            // invalid endpoint domain, set the action to empty
            console.error("invalid domain: " + endpointAttr);
            document.getElementById('prechatForm').setAttribute('action', "");
        }
    }
    if (window.addEventListener) {
        window.addEventListener('load', handlePageLoad, false);
    } else {
        window.attachEvent('onload', handlePageLoad, false);
    }
})();
</script>

<h1>Pre-chat Form</h1>
```

```
<form method='post' id='prechatForm'>
      Name: <input type='text' name='liveagent.prechat.name' id='prechat_field' /><br />

      Email Address: <input type='text' name='liveagent.prechat:Email' /><br />
      Department: <select name="liveagent.prechat.buttons">
          <!-- Values are LiveChatButton and/or User IDs. -->
          <option value="573D01234567890">Route through button 573D01234567890</option>
          <option value="005D01234567890">Route to agent 005D01234567890</option>
          <option value="005D01234567890_573D01234567890">Route to agent 005D01234567890

          with Fallback to button 573D01234567890</option>
      </select><br />
      <input type='submit' value='Request Chat' id='prechat_submit'/>
</form>

</apex:page>
```