Live Agent for Support Supervisors

Salesforce, Winter ’19
<table>
<thead>
<tr>
<th>CONTENTS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Live Agent for Support Supervisors</td>
<td>1</td>
</tr>
<tr>
<td>Supervisor Panel</td>
<td>1</td>
</tr>
<tr>
<td>Assign Skills to Agents</td>
<td>5</td>
</tr>
<tr>
<td>Report on Live Agent Sessions</td>
<td>5</td>
</tr>
<tr>
<td>Index</td>
<td>6</td>
</tr>
</tbody>
</table>
Welcome to Live Agent for support supervisors! Live Agent is a comprehensive chat solution that makes it easy for your agents to support customers. With Live Agent’s supervisor tools, you can easily monitor your agents’ activities, assist your agents in chats, and view data on your agents’ chat sessions. This information applies only to Live Agent in Salesforce Classic.

Available in: Salesforce Classic

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

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

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

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

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

Report on Live Agent Sessions
Gain insight into your agents’ chat activities by building reports about Live Agent chat sessions.

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

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

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

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

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

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

Access the Supervisor Panel

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

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

To use the Live Agent supervisor panel in the Salesforce console:
- Access to the Live Agent supervisor tab in a user profile or permission set, and included in a Salesforce console app

Agent Status List

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

Available in: Salesforce Classic
Available in: Performance Editions and in Developer Edition orgs that were created after June 14, 2012
### Agent Detail | Description
---|---
**Agent Name** | The name of the agent.

*Note:* If a red flag appears next to the name, the agent has requested help. Respond via the chat detail module (far right).

**Status** | The agent’s Live Agent status.

**Action** | The actions you can take to change the agent’s status.

**No. Chats in Progress** | The number of chats that an agent is engaged in.

**No. Requests Assigned** | The number of pending chat requests that are currently assigned to the agent.

**Time Elapsed Since Login** | The amount of time the agent has been logged in to Live Agent.

**Time Elapsed Since Last Accept** | The amount of time since the agent last accepted a chat request.

**Message to Supervisor (optional)** | The private message that the agent sent with a help flag.

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

### Customer Detail | Description
---|---
**Visitor Name** | The name of the customer, if available.

**IP** | The IP address of the customer’s device.

**Network** | The customer’s network, if available.

**Browser** | The type of internet browser the customer is using to connect to their chat window.

**City** | The city the customer is chatting from.

**Country** | The country the customer is chatting from.

**Duration** | The amount of time the customer has been engaged in a chat with the agent.

**Action** | The actions you can take to view the customer’s chat with the agent.

### SEE ALSO:
- [Live Agent Statuses](#)

## Queue Status List

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

**Available in:** Salesforce Classic

**Available in:** Performance Editions and Developer Edition orgs that were created after June 14, 2012
Monitor Your Agents’ Chats

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

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

Available in: Salesforce Classic

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


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

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

   The chat monitor opens in the Agent Status list.

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

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

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

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

SEE ALSO:

Agent Status List
Assign Skills to Agents

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

Available in: Salesforce Classic

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


1. In Setup, enter Skills in the Quick Find box, then select Skills.
2. Click the name of the skill you want to assign.
3. Click Edit.
4. Select either the profiles (recommended) or individual users who have this skill.
5. Click Save.

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

Report on Live Agent Sessions

Gain insight into your agents’ chat activities by building reports about Live Agent chat sessions.

Available in: Salesforce Classic

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


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

1. Create a custom report type using Live Agent Sessions as the primary object.
2. Create a new Live Agent report using the Report Builder in Salesforce Classic or the Reports tab in Lightning Experience.
3. Customize your report to include the columns of information you want to feature.
4. Save or run the report.

SEE ALSO:

Create a Report
Build a Report in Salesforce Classic
Live Agent Session Records
INDEX

L
Live Agent
  agent status list 2
  custom report type 5
  monitor chats 4
  queue status list 3
  Salesforce console 1–2
  sessions 5
  skills 5
  status 2

Live Agent (continued)
  supervisor panel 1–4
  whisper messages 4

S
supervisor panel
  agent status list 2
  monitor chats 4
  queue status list 3
  whisper messages 4