Implementing

Live Agent

in Salesforce

Prepared by

OPTANIUM

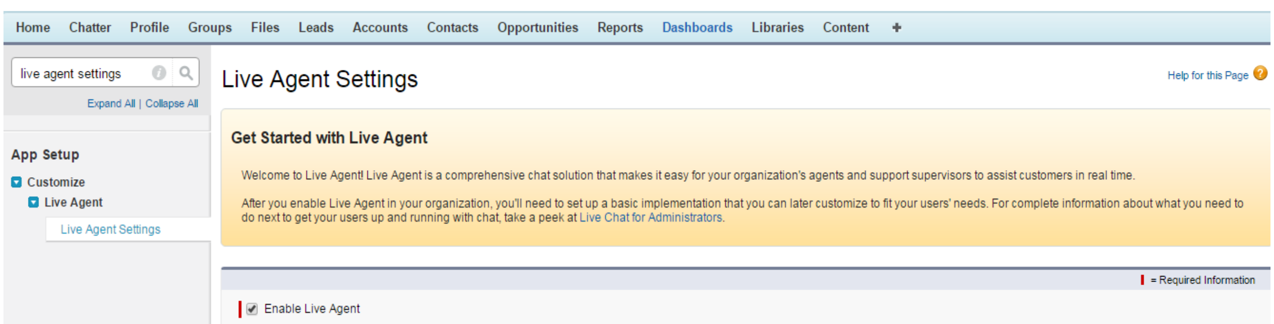
Description:

Using Live Agent, Agents can interact with customers and prospects online and in real time. Enter quickly the right answers and welcome future customers. It also helps with regards to other aspects such as

1) Personalized online help in real time
2) Networked employees, higher productivity
3) Enhance team performance

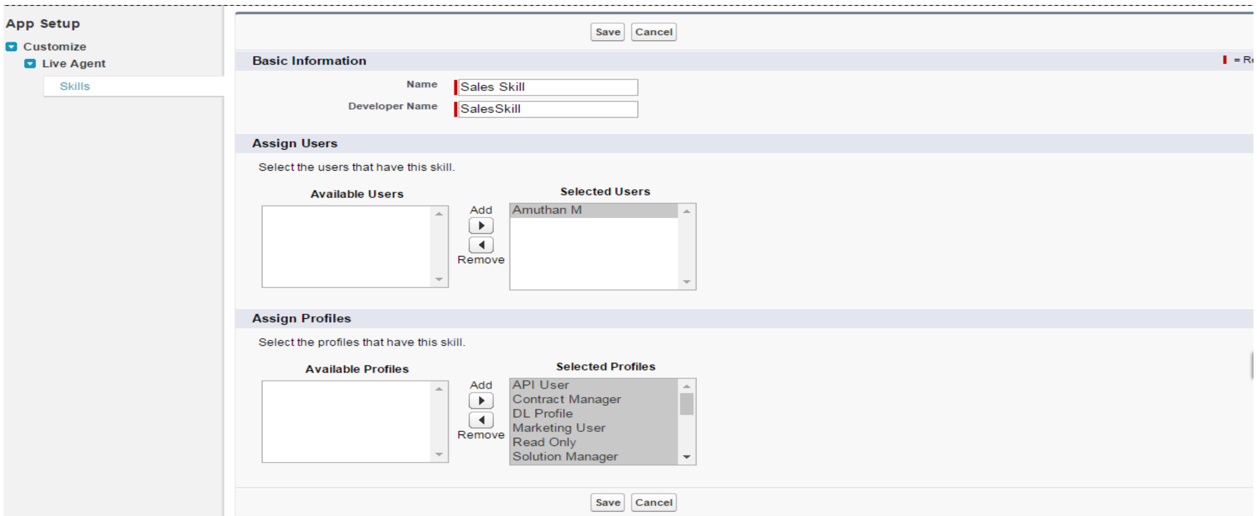
Steps:

1) To implement Live Agent in Salesforce, the below prerequisites are mandatory
    a. Service cloud user license
    b. Live agent user license
2) Users should be checked with "**Service Cloud User**" and "**Live Agent User**" options for accessing/ assigning to Live Agent.
3) Create online/ offline buttons for displaying in the website. Upload both images in Static resource to be used later in the Company's website
    a. Navigate to **Setup -> Develop -> Static Resources** and click New to add Online and Offline images in Static Resource
4) Enable Live Agent in Salesforce by following **Customize -> Live Agent -> Live Agent Settings** and Enable by checking "Enable Live Agent" checkbox. Please find the screenshot below.

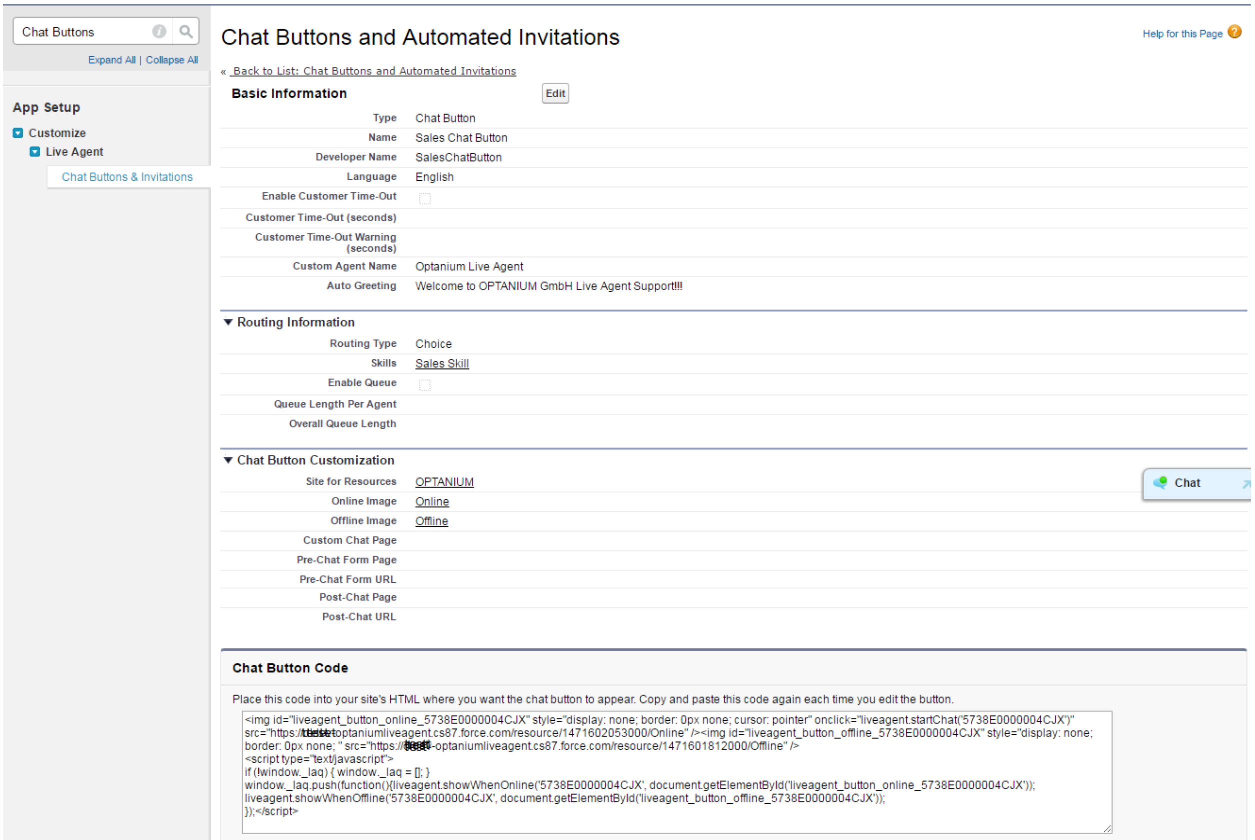


5) Create Skills according to your company needs. For example, you can create a skill called "Sales Skills" for agents who specialize in questions about selling Products in your company. In this case, Sales skills has been created and Users/Profiles are added. To do so, please follow the below steps
    a. Navigate to **Setup -> Customize -> Live Agent -> Skills** and click New and add the following
        i. Name
        ii. Developer Name

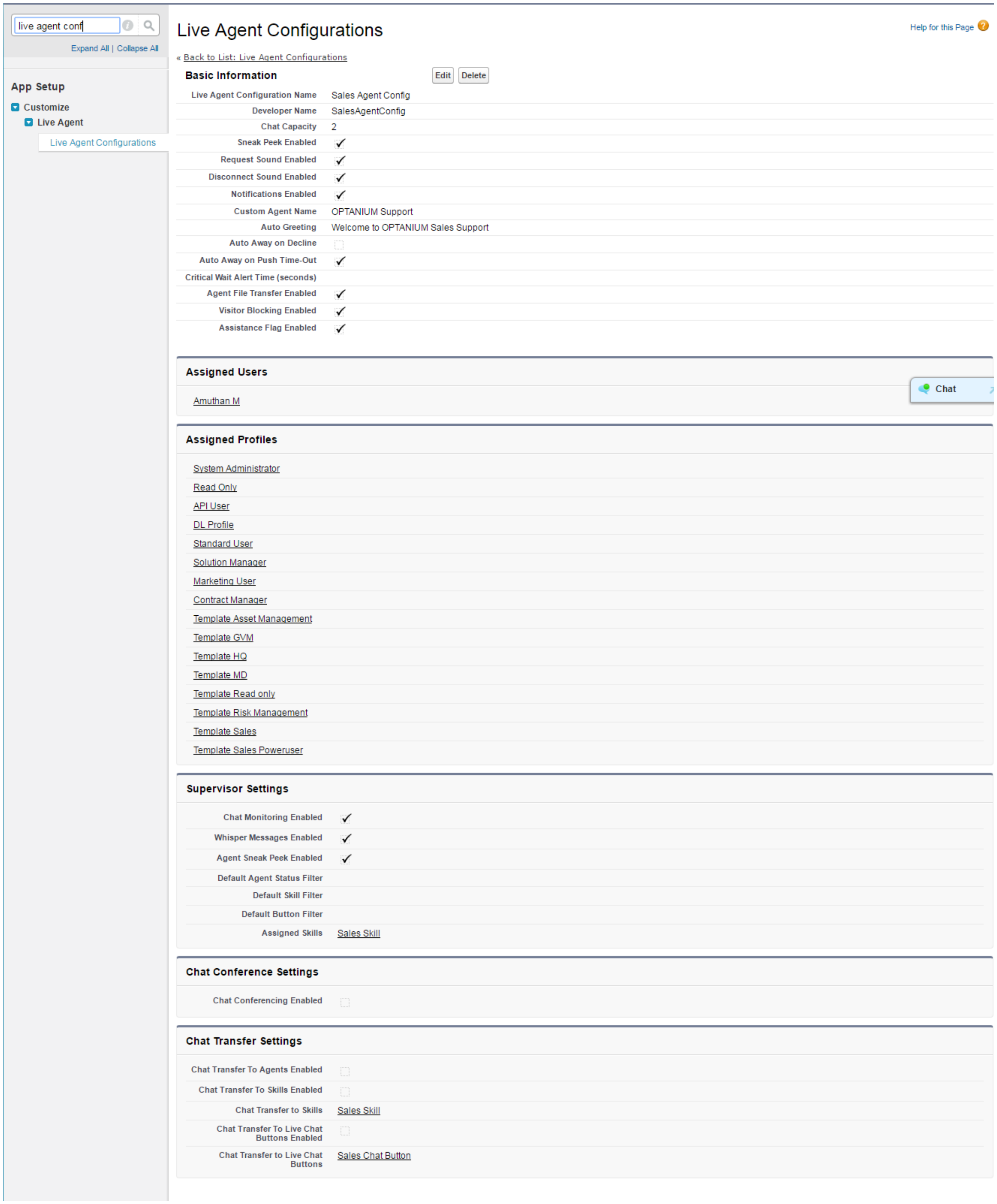
iii. Assign Users
iv. Assign Profiles



6) Setting up **Chat Buttons and Automated Invitations** to control how Customers can access chats with support agents.
   a. Navigate to **Setup -> Customize -> Live Agent -> Chat Buttons & Invitations** and configure the following information(Only mandatory information's are filled for this demo)
      i. Type as "Chat button". Determines how users access chats on your company's site.
      ii. Enter Name and Developer Name
      iii. Language as Preferred. Enforces the language for text in the chat window, such as button names.
      iv. Routing Type as "Choice". Choose how incoming chats are routed to agents with the required skills.
      v. Select available "Skills"
      vi. Select "Site for Resources". Usually Salesforce sites. Choose the site that hosts the images for your custom chat button or automated invitation.
      vii. Select Online Image (Stored in Static Resources). Image that appears when agents with the associated skills are available to chat.
      viii. Select Offline Image (Stored in Static Resources). Image that appears when no agents with associated skills are available to chat.
      ix. Click Save. Now chat buttons and automated invitations are configured and Salesforce will generate a HTML code. Copy it and Save it as a HTML file

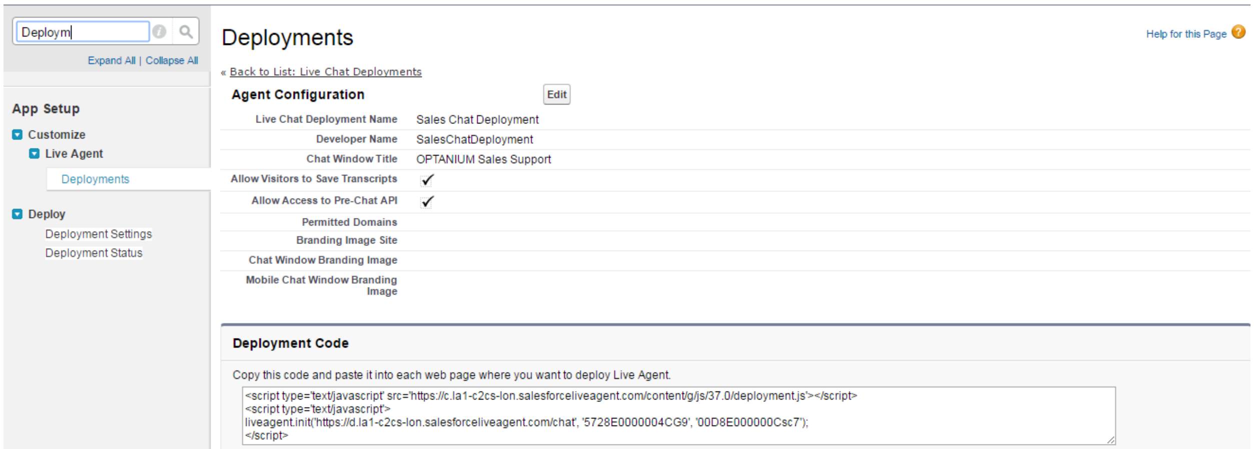


7) Setting up "**Agent Configurations**" which determine what is available to agents and their supervisors in the Live Agent console and the Salesforce console.
   a. Navigate to **Setup -> Customize -> Live Agent -> Agent Configurations** and configure the following information (Only mandatory information is filled for this demo)
   b. Enter the mandatory information as mention in below screenshot



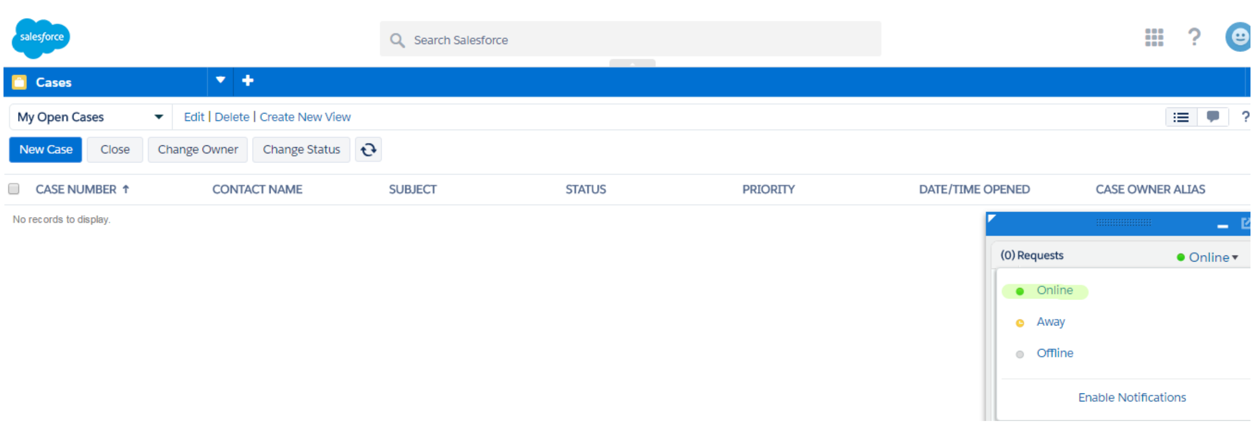
8) **Deployment**. For deploying the Chat that has been created.

a. Navigate to **Setup -> Customize -> Live Agent -> Agent Configurations** and configure the following information (Only mandatory information is filled for this demo)
b. Enter the mandatory information as mention in below screenshot
c. HTML code will be generated and save it HTML file saved at step 6) a. ix.



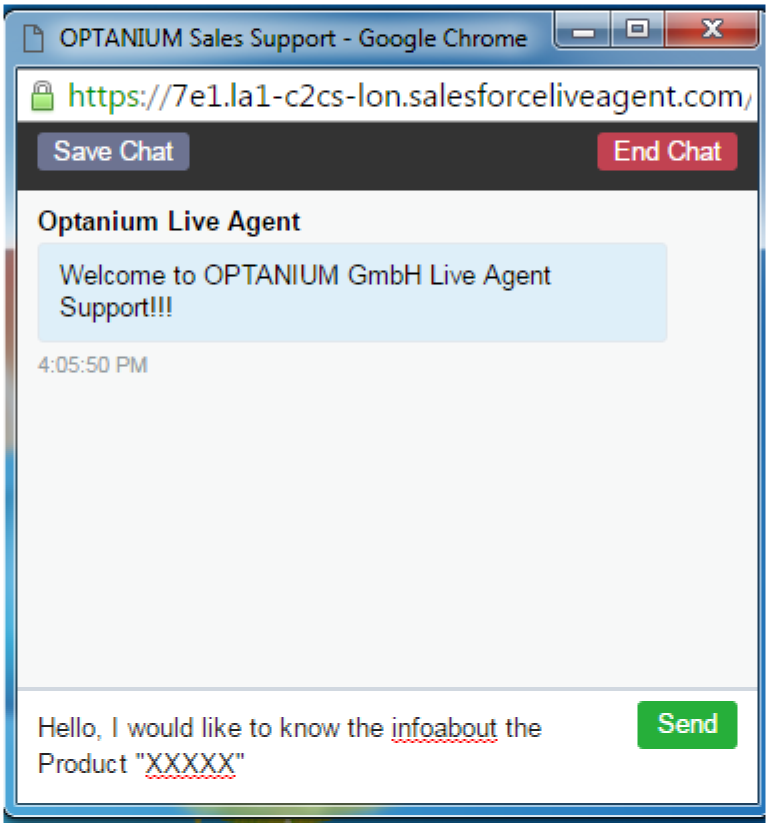
9) Setup **Live Agent App**
a. Navigate to **Setup -> Customize** and click New
b. Select "Console" option. Click Next
c. Enter App label and App Name and click Next
d. Select the objects to include in this console's navigation tab and click next
e. Check "Include Live Agent in this App" and choose the records or pages to open as subtabs of each chat session. Click Next
f. Assign to necessary profiles and Click Save

10) To **Check as Agent**
a. Navigate to the newly Created App and Live Agent Chat window will be available at bottom Right corner. Agent can make himself available by selecting "Online"

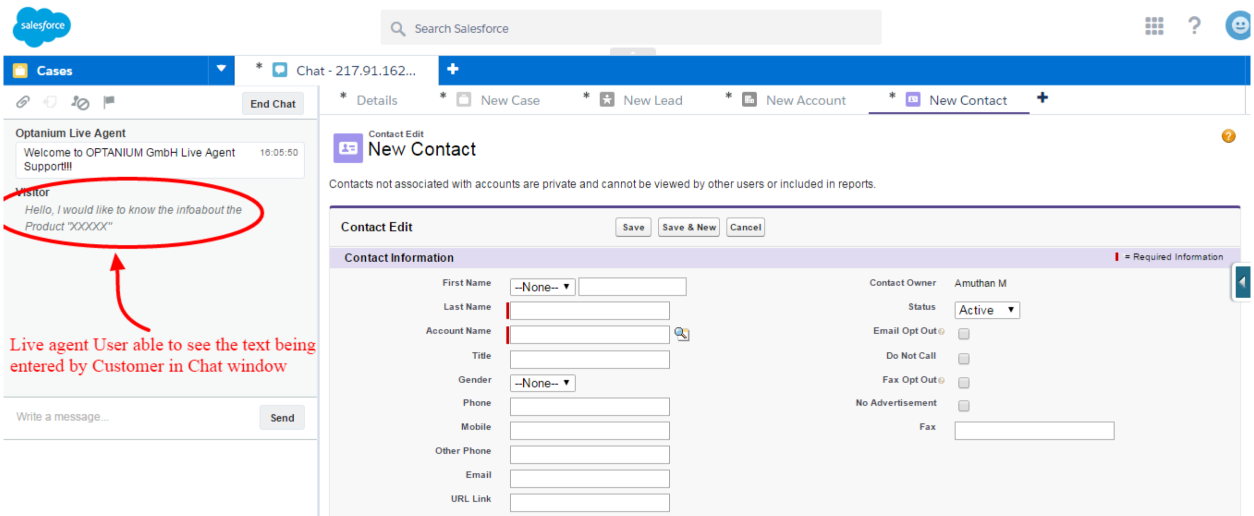


Customer View:

Open the web page been created at step **8) c.** and user will be able to see Online Chat button and clicking on the image will open the browser with Chat window. Now the Customer will be able to chat with live agent



Agent View:


Search Salesforce
Cases
Chat - 217.91.162...
End Chat
Details
New Case
New Lead
New Account
New Contact
Optanium Live Agent
Welcome to OPTANIUM GmbH Live Agent Support!!!
16:05:50
Visitor
Hello, I would like to know the infoabout the Product "XXXXX"
Live agent User able to see the text being entered by Customer in Chat window
Write a message...
Send
Contact Edit
New Contact
Contacts not associated with accounts are private and cannot be viewed by other users or included in reports.
Contact Edit
Save
Save & New
Cancel
Contact Information
= Required Information
First Name
--None--
Last Name
Account Name
Title
Gender
Phone
Mobile
Other Phone
Email
URL Link
Contact Owner
Amuthan M
Status
Active
Email Opt Out
Do Not Call
Fax Opt Out
No Advertisement
Fax