

Implementing

Live Agent

in Salesforce

Prepared by
OPTANIUM

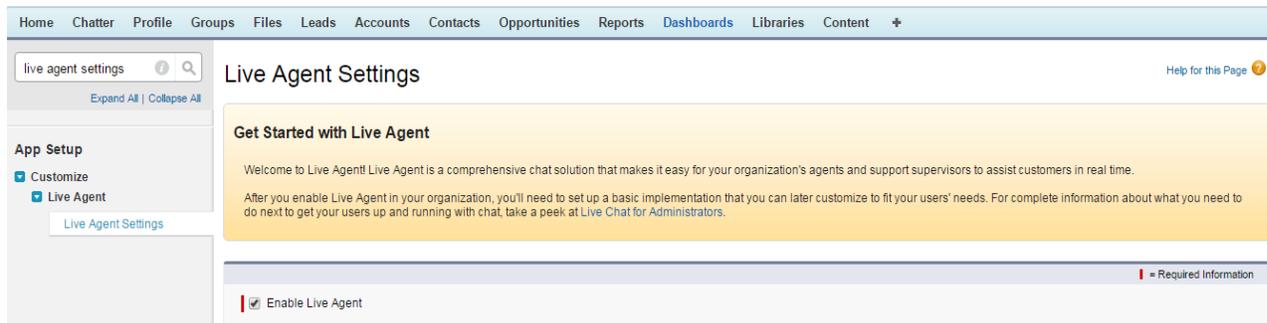
Description:

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

Chat Buttons

Chat Buttons and Automated Invitations Help for this Page

App Setup

- Customize
- Live Agent

Chat Buttons & Invitations

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Basic Information

Type	Chat Button
Name	Sales Chat Button
Developer Name	SalesChatButton
Language	English
Enable Customer Time-Out	<input type="checkbox"/>
Customer Time-Out (seconds)	
Customer Time-Out Warning (seconds)	
Custom Agent Name	Optanium Live Agent
Auto Greeting	Welcome to OPTANIUM GmbH Live Agent Support!!!

Routing Information

Routing Type	Choice
Skills	Sales Skill
Enable Queue	<input type="checkbox"/>
Queue Length Per Agent	
Overall Queue Length	

Chat Button Customization

Site for Resources	OPTANIUM
Online Image	Online
Offline Image	Offline
Custom Chat Page	
Pre-Chat Form Page	
Pre-Chat Form URL	
Post-Chat Page	
Post-Chat URL	

[Chat](#)

Chat Button Code

Place this code into your site's HTML where you want the chat button to appear. Copy and paste this code again each time you edit the button.

```


<script type="text/javascript">
if (window_laq) { window_laq = []; }
window_laq.push(function(){liveagent.showWhenOnline('5738E0000004CJX', document.getElementById('liveagent_button_online_5738E0000004CJX'));
liveagent.showWhenOffline('5738E0000004CJX', document.getElementById('liveagent_button_offline_5738E0000004CJX'));
});</script>

```

- 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

[Expand All](#) | [Collapse All](#)

App Setup

- Customize
- Live Agent

Live Agent Configurations

Live Agent Configurations Help for this Page

[Back to List: Live Agent Configurations](#)

Basic Information [Edit](#) [Delete](#)

Live Agent Configuration Name	Sales Agent Config
Developer Name	SalesAgentConfig
Chat Capacity	2
Sneak Peek Enabled	<input checked="" type="checkbox"/>
Request Sound Enabled	<input checked="" type="checkbox"/>
Disconnect Sound Enabled	<input checked="" type="checkbox"/>
Notifications Enabled	<input checked="" type="checkbox"/>
Custom Agent Name	OPTANIUM Support
Auto Greeting	Welcome to OPTANIUM Sales Support
Auto Away on Decline	<input type="checkbox"/>
Auto Away on Push Time-Out	<input checked="" type="checkbox"/>
Critical Wait Alert Time (seconds)	
Agent File Transfer Enabled	<input checked="" type="checkbox"/>
Visitor Blocking Enabled	<input checked="" type="checkbox"/>
Assistance Flag Enabled	<input checked="" type="checkbox"/>

Assigned Users [Chat](#)

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Assigned Profiles

- [System Administrator](#)
- [Read Only](#)
- [API User](#)
- [DL Profile](#)
- [Standard User](#)
- [Solution Manager](#)
- [Marketing User](#)
- [Contract Manager](#)
- [Template Asset Management](#)
- [Template GVM](#)
- [Template HQ](#)
- [Template MD](#)
- [Template Read only](#)
- [Template Risk Management](#)
- [Template Sales](#)
- [Template Sales Poweruser](#)

Supervisor Settings

Chat Monitoring Enabled	<input checked="" type="checkbox"/>
Whisper Messages Enabled	<input checked="" type="checkbox"/>
Agent Sneak Peek Enabled	<input checked="" type="checkbox"/>
Default Agent Status Filter	
Default Skill Filter	
Default Button Filter	
Assigned Skills	Sales Skill

Chat Conference Settings

Chat Conferencing Enabled	<input type="checkbox"/>
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Chat Transfer Settings

Chat Transfer To Agents Enabled	<input type="checkbox"/>
Chat Transfer To Skills Enabled	<input type="checkbox"/>
Chat Transfer to Skills	Sales Skill
Chat Transfer To Live Chat Buttons Enabled	<input type="checkbox"/>
Chat Transfer to Live Chat Buttons	Sales Chat Button

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

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

9) Setup Live Agent App

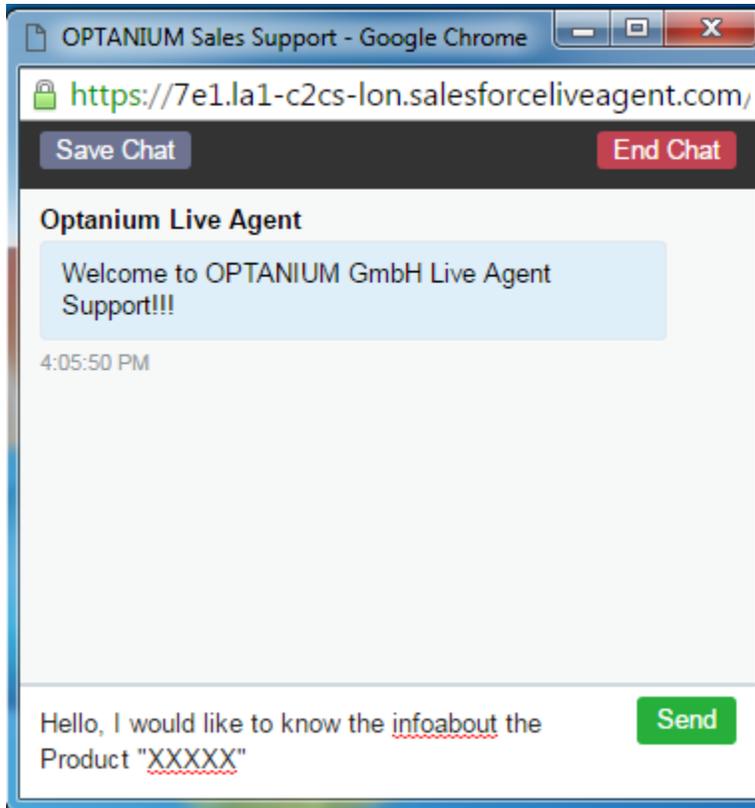
- Navigate to **Setup -> Customize** and click New
- Select “Console” option. Click Next
- Enter App label and App Name and click Next
- Select the objects to include in this console’s navigation tab and click next
- Check “Include Live Agent in this App” and choose the records or pages to open as subtabs of each chat session. Click Next
- Assign to necessary profiles and Click Save

10) To Check as Agent

- 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:

The screenshot displays the Salesforce Agent View interface. On the left, a chat window titled 'Optanium Live Agent' shows a message from a 'Visitor' at 18:05:50: 'Hello, I would like to know the infoabout the Product "XXXXX"'. This message is circled in red, with a red arrow pointing to a red text annotation: 'Live agent User able to see the text being entered by Customer in Chat window'. The main area shows the 'New Contact' form under 'Contact Edit'. The form includes fields for First Name, Last Name, Account Name, Title, Gender, Phone, Mobile, Other Phone, Email, and URL Link. On the right, there are fields for Contact Owner (Amuthan M), Status (Active), and various opt-out checkboxes (Email, Do Not Call, Fax, No Advertisement, Fax). Buttons for 'Save', 'Save & New', and 'Cancel' are at the top of the form.