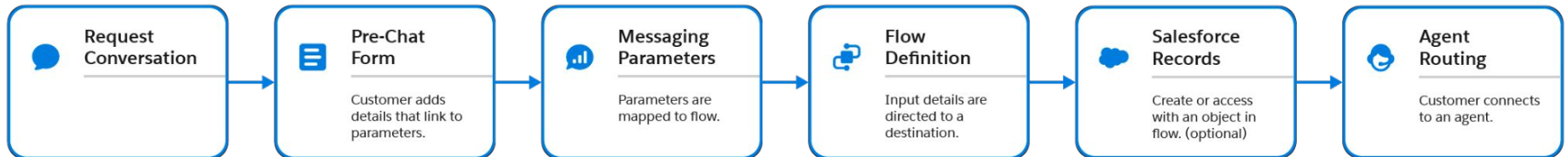# Salesforce Chat -
lessons learned

Svet Voloshin

Chat is Dead, or is it?

> ⊘ IMPORTANT The legacy chat product is in maintenance-only mode, and we won't continue to build new features. You can continue to use it, but we no longer recommend that you implement new chat channels. Instead, you can modernize your customer communication with Messaging for In-App and Web. Messaging offers many of the chat features that you love plus asynchronous conversations that can be picked back up at any time.

- What's the difference and why use it?
- Chat is FedRAMPed, Messaging for In-App and Web is not, which means it cannot be used on U.S. Government projects of a particular type or sensitivity

Request Conversation	Pre-Chat Form	Messaging Parameters	Flow Definition	Salesforce Records	Agent Routing
	Customer adds details that link to parameters.	Parameters are mapped to flow.	Input details are directed to a destination.	Create or access with an object in flow. (optional)	Customer connects to an agent.

Messaging for In-App and Web vs. Chat

EATURE	CHAT	MESSAGING FOR IN-APP	MESSAGING FOR WEB
Persistent Conversations			
Persistent Conversation History (with User Verification)	No	Yes	Yes
Asynchronous Conversations (with User Verification)	No	Yes	Yes
Cross-device conversations (with User Verification)	No	Yes	Yes
Session Continuity Across Tabs	Yes	N/A	Yes

Considerations when Replacing Chat...

The Conversation Is Now Asynchronous and Persistent

Chat was session-based, which meant that conversations ended when your customer closed the conversation window or lost connection with an agent. Messaging conversation history remains in the window beyond a single interaction. With Messaging for In-App and Web, agents and customers can start and stop the conversation, then pick it back up at a later time. Customers can also message across tabs and devices without disconnecting the conversation.

https://help.salesforce.com/s/articleView?id=sf.miaw_replacing_chat_considerations.htm&type=5

Salesforce Chat Features

- Real-Time Interaction: Enables real-time, one-on-one customer support or sales interactions directly through the Salesforce interface.
- Pre-Chat Forms: Allows customization of pre-chat forms to gather initial information from customers before connecting them with agents, helping in routing and quicker issue resolution.
- Agent Workspace: Provides an integrated workspace within Salesforce for agents to handle multiple chats simultaneously, access customer data, and perform relevant actions without switching interfaces.
- Routing and Queues: Automated routing ensures that customer chats are directed to the most appropriate agent based on expertise, availability, and other customizable criteria.
- Chat Transcripts: Conversations are automatically saved as chat transcripts, which can be linked to customer profiles and cases for future reference and reporting.
- Quick Texts: Enables agents to use pre-configured messages for common questions, speeding up response times.
- Chatbots and Automation: Salesforce Chat can integrate with Einstein Bots for automated responses to common customer inquiries, which can then be escalated to human agents if necessary.

Deployability

Not all Salesforce Chat settings can be fully deployed via the Metadata API.

Limitations:

- Omni-Channel Settings: Some of the settings specific to Omni-Channel might not be fully deployable.
- Pre-Chat and Post-Chat Forms: These are usually tied to Visualforce pages and might require additional steps to deploy.
- Einstein Bot Configurations: While you can migrate the basic structure of Einstein Bots, the intricate details often require manual intervention.
- Skill-Based Routing: Advanced routing settings may not always be completely deployable and might need manual adjustments.
- Channel Menus and Queues: These may have dependencies that require them to be manually set up in the target environment.
- Quick Text: this is a data component, so it has to be data-loaded.

Best Practices

1. Assess Dependencies: Before attempting a deployment, assess the dependencies and prerequisites to understand what can be automated and what requires manual intervention.
2. Test in Sandbox: Always test the deployment in a sandbox environment to identify potential issues before making changes in the production environment.
3. Check Documentation: Salesforce regularly updates its features and API capabilities, so it's important to consult the latest Salesforce documentation for any recent changes.
4. Incremental Deployment: Consider deploying in small, manageable chunks to isolate issues and make debugging easier.

While the Metadata API can handle a significant portion of the deployment, you may still need to perform some manual configurations to fully set up Salesforce Chat in a new environment.

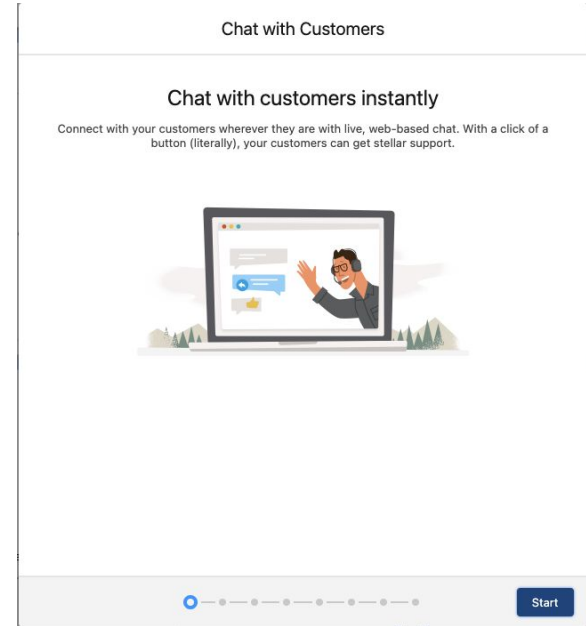# Step By Step Guide To Setting Up Chat in Salesforce

1. Setup Live Web Chat
2. Create **Visualforce Page**
3. Test Live Chat
4. Brand Chat Widget
5. Incorporate Pre-Chat Form
6. Enable Offline Form Submit
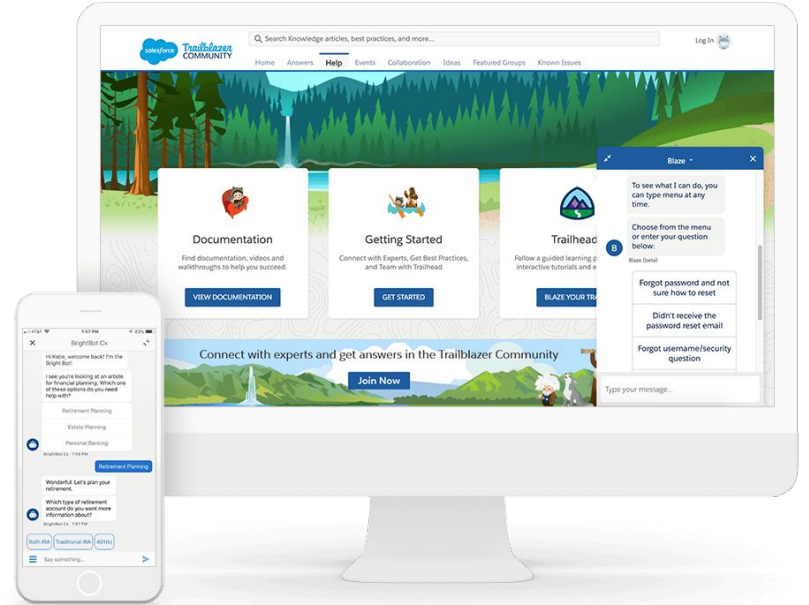
Chat Setup Wizard

- Pros:
  - Quick to set up
  - Easy walkthrough
- Cons:
  - You don't see all of the options
  - Impossible to re-run and adjust settings
  - Only useful once

Past Chats

- There is a component for that in a Lightning Page, but it only works with **Contacts**
- Our implementation could not use Contacts due to large data volume (LDV), so we went with Leads
- There is no component for leads, so an LWC was considered
- LWC requires custom development
- In the end we used a Screen Flow with a Data Table and a Formula Field

We can't display past chats without a contact record attached to the transcript. Attach a contact record and refresh the page.

Related Chat Transcripts
Showing 18 of 18 items

Transcript	Status	Created Date
00000112	Missed	Wed, Sep 06, 23, 08:41:20 AM
00000064	Completed	Wed, Aug 30, 23, 05:25:09 PM
00000090	Completed	Thu, Aug 31, 23, 12:19:37 PM
00000063	Missed	Wed, Aug 30, 23, 05:24:30 PM
00000065	Completed	Wed, Aug 30, 23, 05:28:16 PM
00000074	Completed	Thu, Aug 31, 23, 08:55:44 AM
00000084	Completed	Thu, Aug 31, 23, 11:32:27 AM
00000116	Missed	Wed, Sep 06, 23, 09:57:11 AM
00000129	Completed	Fri, Sep 08, 23, 04:37:08 PM
00000099	Completed	Fri, Sep 01, 23, 02:59:14 PM

Embedded Service Deployment

- Embeddable in websites, VF pages and Experience Cloud
- Works best with Experience Cloud
- Extendable with Code and LWCs* for use in Experience Cloud
  - As of this writing, the options for exposing LWCs externally are to encapsulate them in Aura
  - Lightning Out is another potential option, but it remains in Beta after a few years, so that's not advisable to be used on projects
- Pre-chat form is easy to configure

... > EMBEDDED SERVICE > CHAT_AGENTS
Embedded Service Deployment Settings

Chat Agents
Deployment type: Web

Active

Edit

IMPORTANT If you make additional changes to your chat after setup, the results may take up to 10 minutes to appear for the first time on your website due to cacheing.

Chat Settings
Deployment: Default Deployment
Button: Chat Agents
Show queue position: Not Enabled
Post-chat survey: None

Edit

Branding
Primary Color: #222222
Secondary Color: #005290
Font: Salesforce Sans

Edit

Embedded Service Code Snippets
Get your embedded service up and running on your website.

Get Code

*as of today we are researching **how** the pre-chat form can be extended using LWCs.

Pre-chat Form

- Gather contact information and learn about customer needs before chatting. Create a custom pre-chat form and associate Salesforce records like leads, cases, and contacts. You can also customize the field labels used on the form.
- When you design your pre-chat form, select a use case that automatically associates information from the form to Salesforce records. When a customer enters their name or email address, Salesforce matches the information with a contact or lead record. If no match is found, a new record is created.
- While the pre-chat form can be customized with clicks to an extent, sometimes the UI needs to be altered, in which case it is possible to rebuild it using JavaScript

Now, let's design the pre-chat form

Customize this form based on details you want to collect from your customers.
For the best customer experience, include up to four fields.

Pre-Chat Fields

RECORD	FIELDS	REQUIRED				
Lead	Name	✓	↑	↓	+	✕
	Email	☐	↑	↓	+	✕
	Company	☐	↑	↓	+	✕

Passing values from a Button

Pass values from Start Chat button to Pre-Chat Form (documentation)

In Live Agent, sometimes users need to pass some values from the page, where Start Chat button is located, to pre-chat form. Some users use cookies as an option. However, if the Chat button is on a custom domain and prechat form is on force.com domain then that method won't work. This is because **browsers don't allow one domain to access cookies from another domain; security issue**.

Chat Routing Options

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

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

Omni Channel Flow Routing (advanced & preferred)

"Traditionally with Chat, there was a 1:1 relationship between the Chat Button and a Queue, so it was never easy to build dynamic routing logic in. If we wanted some chats to go to the sales team, and others to service, or if we wanted to prioritize VIP customers over others, we had to either use a Chatbot as a proxy, or code it into the pre-chat form somehow." (*UnofficialSF*)

Use Case:

Route repeat website visitors to the agent who owns their Lead, Case or Contact record, otherwise send the incoming chat to the next available agent.

Assumption: record owner user is the most familiar person with the chatting website visitor and therefore they have the overall context of the issues which are important to the chatting party.

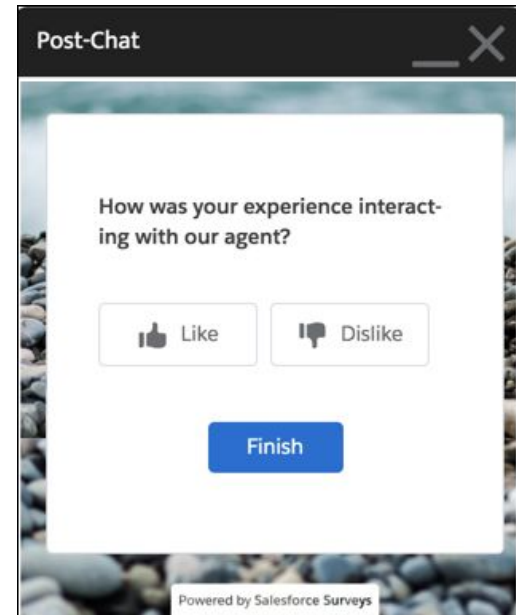**Solution:** Omni Channel Flow
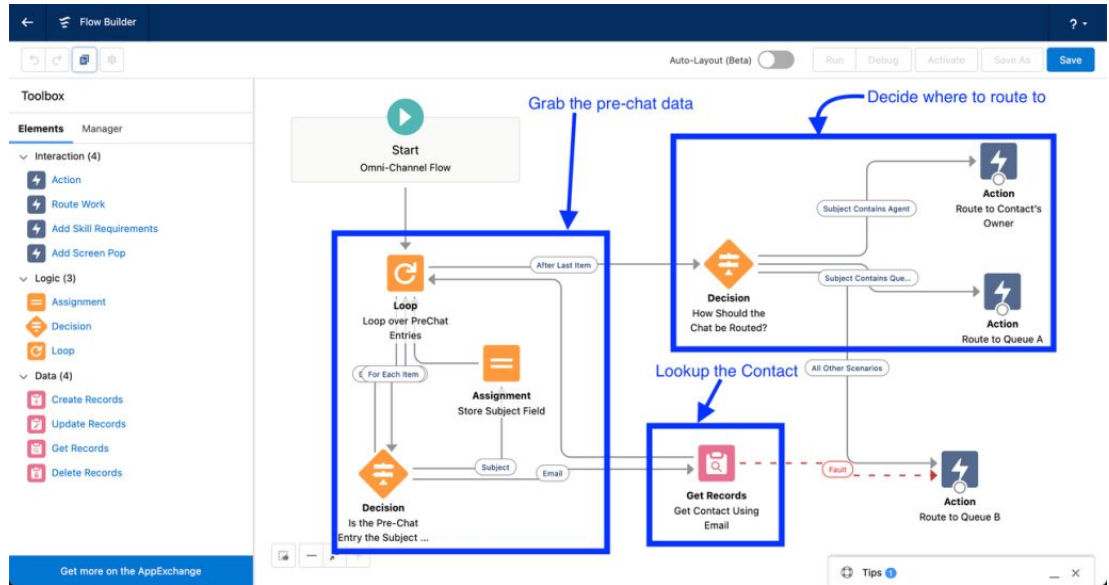
Salesforce Surveys for Chat

Use Cases:

- To measure customer satisfaction. This is the most common use case for post-chat surveys. By asking customers how satisfied they were with their chat experience, you can get valuable insights into how to improve your customer service.
- To identify areas for improvement. The feedback you collect from post-chat surveys can help you identify areas where your customer service can be improved. For example, if you find that many customers are not satisfied with the speed of their chat response, you can take steps to improve your response times.
- To get feedback on specific topics. You can also use post-chat surveys to get feedback on specific topics, such as the knowledge of your agents, the helpfulness of your responses, or the overall quality of your customer service. This feedback can help you make targeted improvements to your customer service.
- To track trends over time. By collecting post-chat surveys over time, you can track trends in customer satisfaction and identify areas where your customer service is improving or declining. This information can help you make informed decisions about how to allocate resources and improve your customer service.
- To improve agent performance. The feedback you collect from post-chat surveys can also be used to improve agent performance. By identifying areas where agents are struggling, you can provide them with training and coaching to help them improve.

Salesforce Documentation

Omni Channel Flow & Einstein Chat Bots

Improve Customer Service Using Flow, Omni-Channel Routing, and Einstein Bots | Automate This!

Use cases for using Flow to enhance servicing with Omni-Channel Routing and Einstein Bots

Route Conversations to and from Your Enhanced Bot

Use Pre-Chat with an Enhanced Bot

Conclusion & Recommendations

- [Review Messaging in Service Cloud](#)
- If you are not constrained by any requirements, [Set Up Messaging for In-App and Web](#)
- If you are constrained, stick with Salesforce Chat as a compromise
- Use Experience Cloud whenever possible
- Large group realistic UAT is key here