



HEROFORGE



Salesforce Administrator manual

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September 12th, 2023

Table of contents

Introduction	4
Requirements	4
Pre-install instructions	5
Enable Chat	5
Enable Chat Users	5
Setup Chat with Customers	6
Post-install instructions	7
Grant HeroChat permissions to Users	7
Change "Chat Messages (Text)" component	8
Add HeroChat to LiveChatTranscript Lightning page	9
Create Settings record	10

Introduction

Requirements

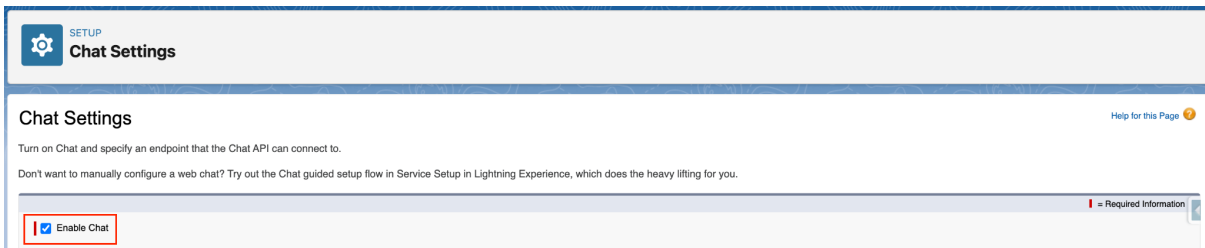
The following requirements are mandatory, and without them the HeroChat application cannot be installed.

- The Salesforce organization must have Service Cloud licenses, and they have to be assigned to at least one user.
- The Salesforce organization must have Salesforce Live Chat licenses.

Pre-install instructions

Enable Chat

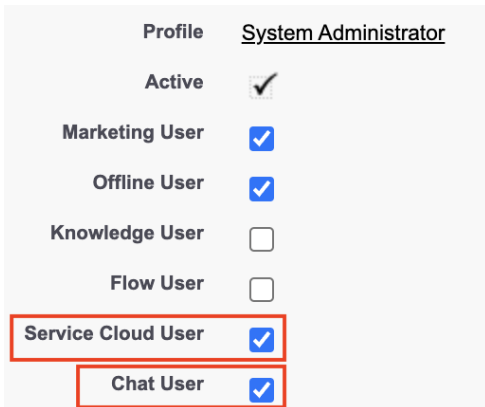
1. Go to Setup – Service – Chat – **Chat Settings**.
2. Click on **Enable Chat**.
3. Click **Save**.



Enable Chat Users

For each live chat agent you want to set up with HeroChat:

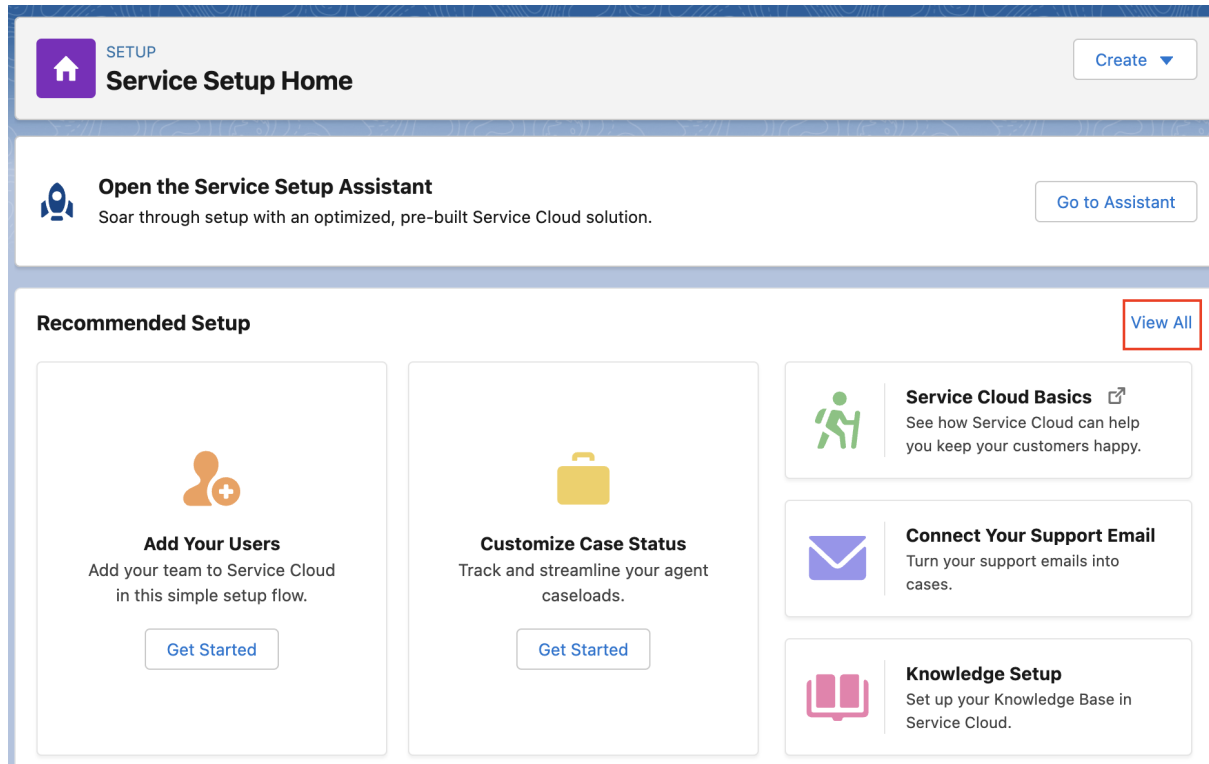
1. Go to Setup – Users – **Users**.
2. Click **Edit** next to the User record.
3. Tick the **Service Cloud User** checkbox, and the **Chat User** checkbox.
4. Click **Save**.



Setup Chat with Customers

Follow these steps if you're setting up Live Agent in Salesforce for the first time, or if you want to make a new chat button. If you are already using Live Agent chat, and you want to use HeroChat to replace it, you don't have to do these steps.

1. Go to Service Setup – **Service Setup Home**.
2. Click on **View All**.



3. Select **Chat with Customers** and follow the wizard.
4. In Step 1 (Create a queue), make sure you **select your Live Agent chat users** (click on + icon). For the queue and group name, type HeroChat.
5. In Step 2 (Prioritize chats), leave the default values.
6. In Step 3 (Agent workload), leave the default values.
7. In Step 4 (Enable chat):
 - a. Website URL: put the **URL of the website where the Live Agent chat button will be placed**. For example: `https://*.heroforge.tech`
 - b. Salesforce Site Domain: use **herochat**.
8. In Step 5 (Chat type), select **Service**.
9. In Step 6 (Contact form), leave the default values.
10. In Step 7 (Code snippet), make sure you **copy the code** in your clipboard.
11. Finally, paste the code on the website where Live Agent chat must be used. You might need help from your IT department.

Post-install instructions

Grant HeroChat permissions to Users

1. Go to Setup - Users - **Permission Set groups**.
2. Click on **HeroChatAdmin** permission set group.

API Name	Label	Description	Last Modified	Created	Status
HeroChatAdmin	HeroChat Admin		12/9/2023, 18:59	22/8/2023, 14:22	Updated
HeroChatSupervisor	HeroChat Supervisor		12/9/2023, 18:59	24/8/2023, 17:48	Updated
HeroChatAgent	HeroChat Agent		12/9/2023, 18:59	24/8/2023, 17:48	Updated

3. Click on **Manage Assignments**.

Permission Set Group
HeroChat Admin

Find Settings... Edit Properties **Manage Assignments**

Permission Set Group Overview

Description	API Name	HeroChatAdmin
Namespace Prefix	Status	Updated
Session Activation Required	Created By	Josep_Vall-Iobera, 22/8/2023, 14:22
Last Modified By	Josep_Vall-Iobera, 12/9/2023, 18:59	

4. Click on **Add Assignment**.

... > SETUP > PERMISSION SET GROUP 'HEROCHAT ADMIN'

HeroChat Admin

Current Assignments **Add Assignment**

5. Select the users you would like to add to HeroChat as admins and click Next.
6. Review the data on the next screen and click **Assign**.
7. Repeat this process for the **HeroChat Superviors** and the **HeroChat Agents**.

Change “Chat Messages (Text)” component

1. Go to Setup – Feature Settings – Service – Embedded Service – **Embedded Service Deployments**.
2. Find your Embedded Service Deployment record and click on **View**.

Embedded Service Deployments					New Deployment
Embedded Service Deployments					
1 item • Sorted by Name • Filtered by All embedded service deployments					
Name ↑	Deployment Type	Modified On	Modified By		
1 LiveAgent	Web	15/3/2023, 17:25	JVall	View	Delete View Edit

3. Click on **Edit** on the **Chat Settings** section.

Chat Settings
Deployment: Chat Setup Flow
Button: LiveAgent
Show queue position: Not Enabled
Post-chat survey: None

Edit

Branding
Primary Color: #222222
Secondary Color: #005290
Font: Arial

Edit

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

Get Code

4. Click **Edit** on the **Customize with Lightning Components**.

Chat Settings
Deployment: Chat Setup Flow
Button: LiveAgent
Show queue position: Not Enabled
Post-chat survey: None

Edit

Pre-Chat page
Status: Enabled
Object: Contact, Case
Pre-Chat Fields: Name, Email, Subject, Web Email

☒ Active
Edit

Offline support
Status: Disabled
Offline support lets your customers log a case when your agents aren't online to chat.
Any time you change the status for offline support, make sure to regenerate the code snippet.

☐ Inactive
Edit

Additional branding
Base font size: Medium
Width: 320
Height: 498

Edit

Code Settings
Add optional code modifications and link to static resource files.

Edit

Customize with Lightning Components
Use Lightning Web Components to customize your embedded service window. [Learn more.](#)

Edit

5. Select **heroChatVisitorBaseMessage** to replace the Chat Messages (Text).

STANDARD COMPONENT	CUSTOM COMPONENT ⓘ
Chat Header	None
Chat Messages (Text)	heroChatVisitorBaseMessage
Minimized ⓘ	None
Pre-Chat ⓘ	✓ heroChatVisitorBaseMessage

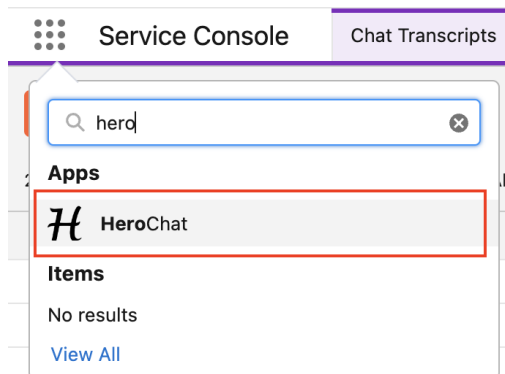
6. Click **Save**.

Add HeroChat to LiveChatTranscript Lightning page

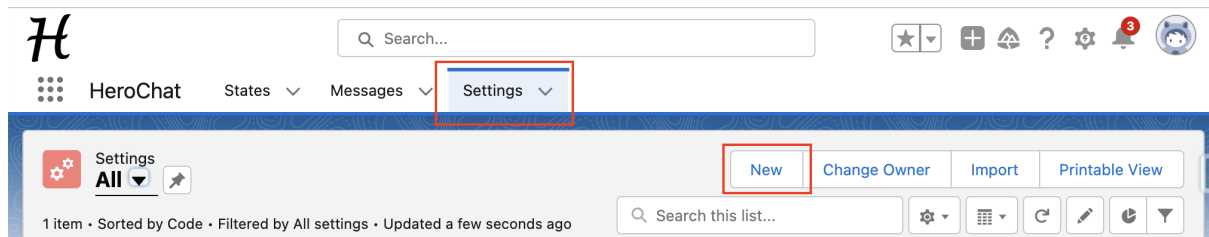
- Go to Setup - Object Manager - **Chat Transcript**.
- Click **Lightning Record Pages**.
- Click on **Chat Transcript Record Page**.
- Click on **Edit**.
- Click on the **Tabs** component.
- Go to the Conversation Tab and **remove the Conversation component**.
- Drag and drop the **HeroChat** component into the Conversation tab.
- Click **Save**.

Create Settings record

1. From the Homepage, go to Apps and search the **HeroChat app**.



2. Click on **Settings** tab and then click on **New**.



3. In the **New HeroChat Settings** page:
 - a. Tick the Is Active checkbox.
4. For the API key, use **444CE00114C26AF12CCD56289FE68443**.
5. For the Shortcuts multipicklists, select all values for all of them.

* = Required Information

Information

Code: HCS-00000000

Is Active: ☒

API keys

* API key: qH3NvELO4SbEDBxL/8Y1yoEzo7U2agPIJkWmeXgpm5j

Shortcuts

* Greetings Shortcut

Available: [Empty box]

Chosen:

- Hello! How can I assist you today?
- Good day! How may I help you with your needs?
- Welcome! What can I do for you today?
- Hi there! How may I be of service today?

* Issue Shortcut

Available: [Empty box]

Buttons: Cancel, Save & New, Save

6. Click **Save**.