



A User Guide to Comm100 Live Chat Salesforce Integration

Introduction

Knowledge is power—and when it comes to delivering exceptional customer experience, the more you know about your customers, the more power your agents have to close deals and resolve tricky issues. So it comes as no surprise that more and more companies are using CRM software to manage customers. As the most widely used CRM software in the world, Salesforce empowers scores of companies to store customer data collected from numerous contact points for unified management and maintenance.

Looking up customer information in Salesforce can greatly enhance your team's sales or customer service operations. But efficiency can be compromised if live chat agents are switching between applications when chatting with customers. It can also be time-consuming for agents to record customer data collected from various contact points (phone, live chat, email, etc.) to Salesforce.

We believe that your agents shouldn't have to compromise their efficiency to deliver top tier support. As a result, we've seamlessly integrated Comm100 Live Chat with Salesforce for convenience and ease-of-use. With this integration:

- Customer data can be transferred to Salesforce automatically as configured
- Existing customers can be recognized automatically during chat sessions in agent console
- Agents can access customer information from Salesforce right in agent console
- A contact/lead/case/task can be automatically created when a chat ends or an offline message is received
- A contact/lead/case/task can be manually created by agents in the agent console
- Salesforce fields can be used to create chat routing rules

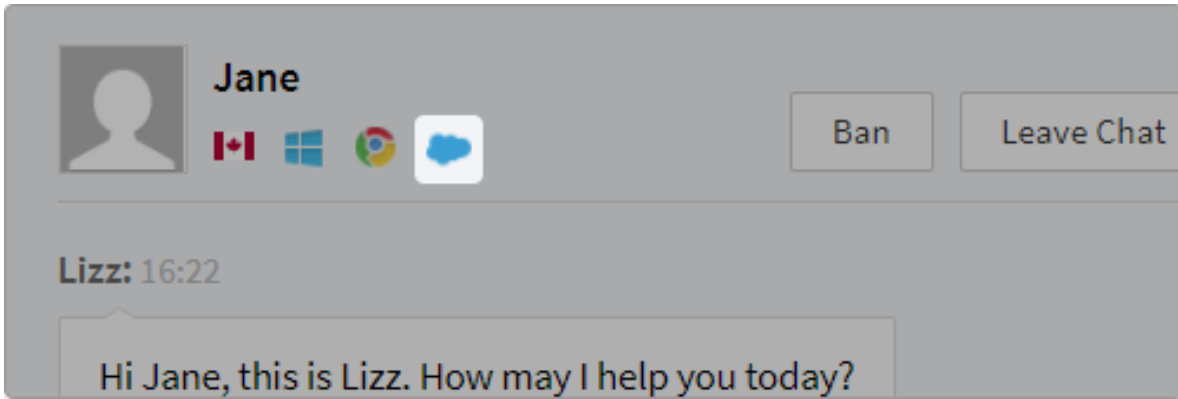
In this user guide, we will walk you through the process of enabling these integration features for an enhanced Comm100 and Salesforce experience.

Recognize Existing Customers in Salesforce

With Comm100 Live Chat, you don't have to guess whether the visitor you are chatting with exists in your Salesforce system. As soon as you start chatting with a visitor, Comm100 will automatically detect the visitor in Salesforce as a contact, lead or an account based on your predefined identification rules. You can refer to the [Object Identification Rules](#) section for further details.

Show Salesforce Icon in Comm100 Agent Console

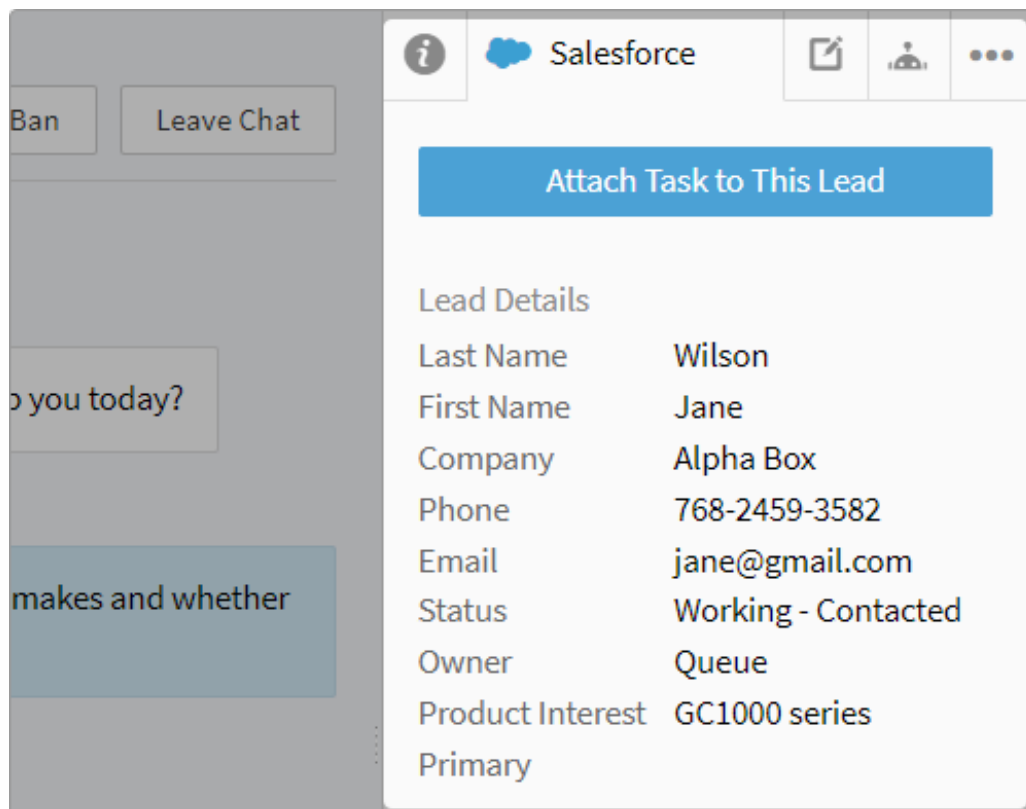
Once an object is identified in Salesforce, there will be an icon beneath the visitor name informing the agent that the customer exists in Salesforce. This is the case regardless of whether it is a contact, a lead or an account. For additional visitor information, you can click the icon to access the details page in Salesforce.



Display Customer Information in Comm100 Agent Console

One purpose of identifying existing customers in Salesforce is to display relevant customer information directly in the Comm100 agent console. This enables you to easily gain a more comprehensive view of the visitor you are chatting with, which helps boost accuracy and efficiency.

Once a visitor is found in Salesforce based off your predefined identification rules, Comm100 will read the contact/lead/account details from Salesforce and display the data in your agent console per your predefined field mapping rules. (Please refer to the [Field Mapping between Comm100 Live Chat and Salesforce](#) on how to configure which fields to display in your agent console for each object type.) You are free to edit the customer data for accuracy. Thus you can have a better knowledge of the visitor immediately after you are connected.



Create/Update Salesforce Objects in Comm100 Live Chat

It can take a lot of time to transfer information collected from live chat to Salesforce for the purpose of creating leads, contacts, tasks or cases. With the Salesforce integration, Comm100 Live Chat enables agents to manually create or update such objects directly in the agent console. You can also make the system to automatically create/update these objects when a chat ends or an offline message is received.

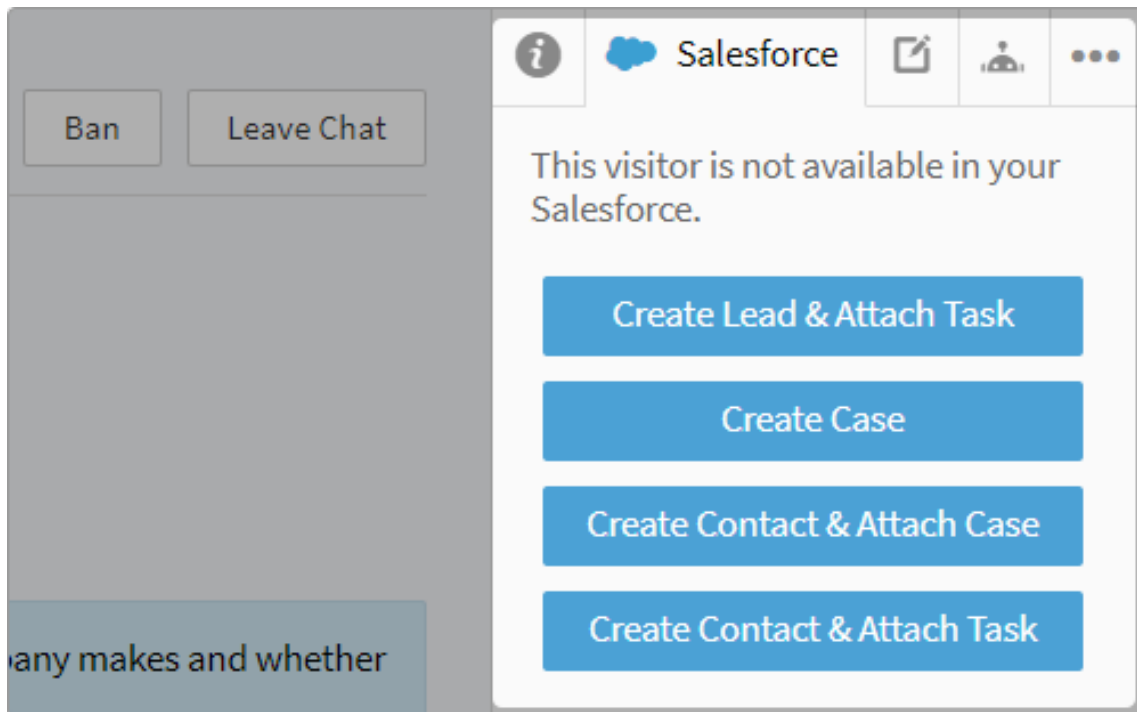
Manually Create/Update Salesforce Objects in Agent Console

If you choose to create/update objects manually, you will see different options in your agent console's Salesforce tab depending upon the object identification results in Salesforce.

As soon as a chat session is established, Comm100 will start the identification process per the rules you have configured beforehand. (See how to configure the [Object Identification Rules](#).)

When the Visitor Doesn't Exist in Salesforce as a Contact/Lead

If the visitor you are chatting with cannot be found in Salesforce as a contact or a lead, then you have four options. See the image below:



1. Create Lead & Attach Task

Click this button and you can add the visitor you are chatting with to Salesforce as a lead in real time; the ongoing chat will also be added as a task under this lead when the chat ends.

Creating a lead in your agent console is exactly the same as that in your Salesforce. All the fields, required or optional, system or custom, are identical and they are displayed in the same order as that in your Salesforce. For example, “Salutation” is the third field in the lead creation form in your Salesforce with dropdown options “Mr.,” “Miss.,” and “Ms.,” the same field with the same options will be displayed at the same position when you create a lead in the Comm100 agent console. Initial values are assigned to designated fields according to the field mapping rules. (See the [Mapping between Comm100 Live Chat and Salesforce](#) section for how to configure field mapping rules.)

The screenshot shows a Salesforce lead creation form within the Comm100 agent console. The form is titled "Salesforce" and has a progress bar with "Lead" and "Task" stages. The "Lead" stage is active. The form fields are:

- Last Name * (required): White
- First Name: Lynn
- Company * (required): Americanoutdoor
- Phone: 768-2459-3582
- Email: lynn@americanoutdoor.com
- Status * (required): Open - Not Contacted
- Owner: bellaqueue
- Product Interest: GC1000 series
- Primary: No

There is a link "show all fields of the default layout" and buttons "Next" and "Cancel" at the bottom.

Once you have created a lead, the lead details will be shown in the Salesforce tab and you are free to edit the fields as needed.

The screenshot shows a Salesforce chat interface. At the top, there's a header with the Salesforce logo and the name 'Salesforce'. Below the header, a green notification states: 'A new task will be created and attached to this lead when the chat ends.' The main content is divided into two sections: 'Lead Details' and 'Task Details'.

Lead Details	
Last Name	Wilson
First Name	Jane
Company	American Outdoor
Phone	7787850464
Email	jane.wilson@americanoutdoor.com
Status	Open - Not Contacted
Owner	Lynn White
Product Interest	GC1000 series
Primary	

Task Details	
Name	JANE
Subject	Follow up
Due Date Only	02/25/2019 08:00:00
Priority	High
Assigned To	Linda Holden

You can also edit the task details. When the chat ends, the chat details will be added as a task under the lead.

The screenshot displays a Salesforce chat window with a 'Create Case' form. At the top, there is a progress bar with two stages: 'Lead' and 'Task'. The 'Task' stage is currently selected. Below the progress bar, the form fields are as follows:

- Subject:** Follow up
- Due Date Only:** 2019-02-26
- Priority *:** High
- Assigned To:** chen linda

At the bottom of the form, there are four buttons: 'Send', 'Save', 'Previous', and 'Cancel'. The 'Send' button has a dropdown arrow, while the others are standard buttons.

2. Create Case

This option allows you to add the ongoing chat as an independent case into Salesforce, without belonging to any contact.

The screenshot shows a chat window with a 'Salesforce' header. A 'Create Case' form is open, containing the following fields:

- Case Type: Electronics
- Case Reason: After-sales
- Subject: Confirm order
- Priority: High
- Owner: bellaqueue

At the bottom of the form, there is a link that says 'show all fields of the default layout'. In the chat interface, a 'Send' button is on the left, and 'Save' and 'Cancel' buttons are at the bottom of the form.

Click this button; a message will appear, informing you that a new case will be created when the chat ends.

The case creation process starts on the background automatically when the chat ends according to the field mapping rules. There is no visual interface for the process.

3. Create Contact & Attach Case

When choosing this option, you can add the visitor into Salesforce as a contact and the ongoing chat as a case under the contact.

The process of creating a contact in your agent console is exactly the same as creating a lead. **The contact creation form has the same fields, required or optional, system or custom, as that in your Salesforce and they are displayed in the same order.** Initial values are assigned to designated fields according to the field mapping rules.

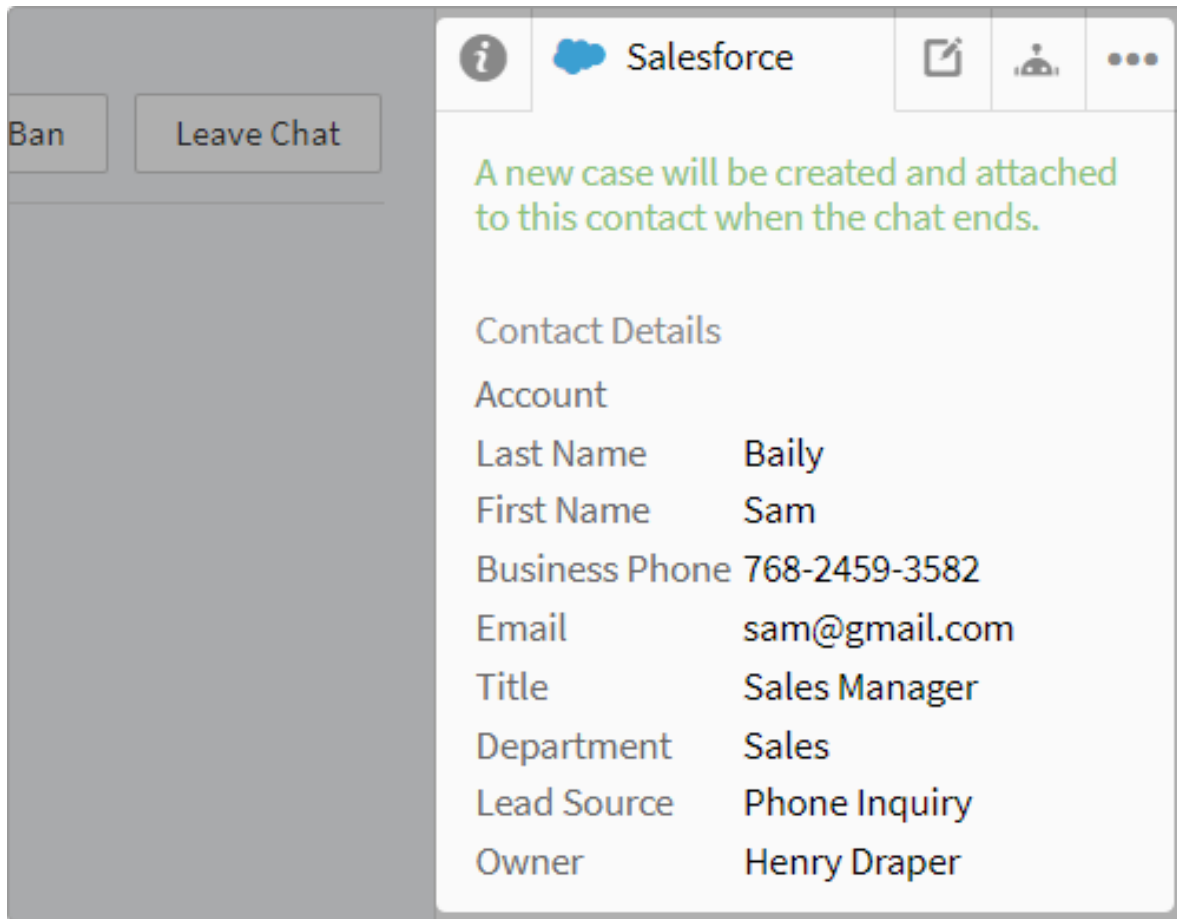
Once you have created a contact, the details will be shown in the Salesforce tab and you are free to edit the fields as needed.

The screenshot shows a Salesforce contact creation form within an agent console. The form is titled "Salesforce" and has two tabs: "Contact" (selected) and "Case". The form fields are as follows:

- Account: bella account
- Last Name *: White
- First Name: Lynn
- Business Phone: 256-554-6636
- Email: lynn.white@americanoutdoor.com
- Title: Sales Manager
- Department: Business
- Lead Source: Partner Referral (dropdown menu)
- Owner: chen linda

At the bottom of the form, there is a link that says "show all fields of the default layout". The form is part of a larger interface with a "Leave Chat" button on the left and "Send", "Next", and "Cancel" buttons at the bottom.

When the chat ends, the chat details will be added as a case under the contact.



4. Create Contact & Attach Task

This option allows you to add the visitor into Salesforce as a contact and the ongoing chat as a task under the contact.

The process of creating a contact and attaching the occurring chat as a task is exactly the same as creating a lead and attaching the chat as a task, or creating a contact and attaching the chat as a case. Once you have created a contact, the details will be shown in the Salesforce tab and you are free to edit the fields as needed.

When the chat ends, the chat details will be added as a task under the contact.

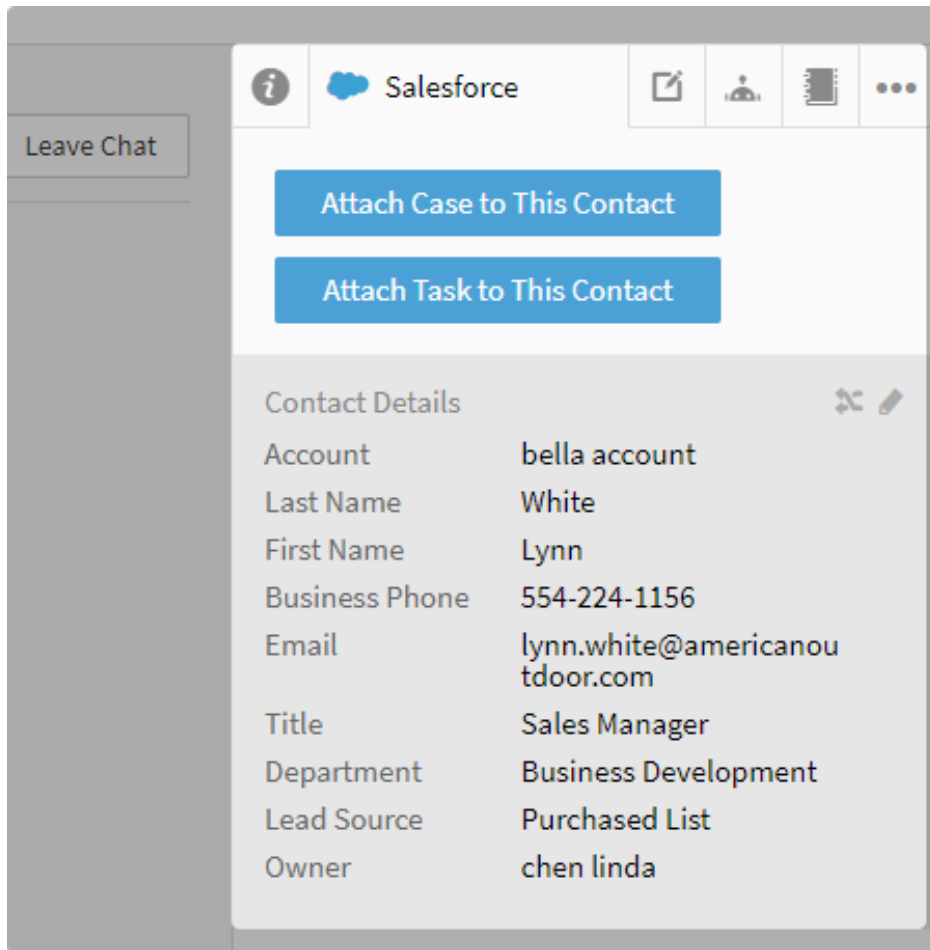
Please note that you can only choose one option from the above four. For example, if you want to add the visitor as a contact, then you cannot add him/her as a lead at the same time.

When the Visitor Already Exists in Salesforce as a Contact/Lead

If the visitor you are chatting with can be found in Salesforce as a contact or a lead, then the relevant details will be read from Salesforce and display in your agent console. You can edit the information as needed.

In addition, you can attach the ongoing chat as a case or a task under the found contact, or a task under the found lead.

If the visitor is found as a contact in Salesforce, then the contact details will be shown in the agent console and you will see a button to attach a case or a task to this contact. Click the button to start the attaching process. Note that the process is running on the background when the chat has ended. When it's done, you will see a message informing you that the case or the task has been successfully attached to the current contact.



The same rules apply when attaching tasks to a lead.

Automatically Create/Update Salesforce Objects When a Chat Ends or an Offline Message Is Received

You can see from the manual creation/update section that you have the choice to add a visitor into Salesforce as a contact or a lead, as well as to update the current contact or lead. This gives you greater flexibility in handling your visitors.

But in some cases, automatic creation/update is more efficient. For example, when you are certain that visitors from the live chat channel should be treated as leads for future follow-up, the automatic process saves your agents time and energy.

If you choose the automatic process, the most important thing is to set up rules based off of your customer relationship management needs. Whenever a chat is ended or an offline message is received, the automatic creation or update process will take place based on your specific rules.

When a Chat is Ended

Create Lead/Contact/Case/Task in Agent Console manually

Automatically

Create/Update Contact & Attach Case ▲

Create/Update Contact & Attach Case

Create/Update Contact & Attach Task

Create Case

Create/Update Lead & Attach Task

Do Nothing

When an Online message is received

Create/Update Contact & Attach Case ▼

When a Matching Contact is Found

Do not update the contact.

Update the contact with information from live chat.

Only add new information (Do not overwrite existing information).

There are five options for you to choose from:

1. Create/Update Contact & Attach Case

If you choose this option, Comm100 Live Chat will first execute the identification rules to determine whether the current visitor exists in Salesforce. The identification result then dictates what happens next:

- If the visitor doesn't exist in Salesforce, Comm100 Live Chat will automatically create a new contact for you based on your predefined field mapping rules and attach the ongoing chat as a case when the chat ends.
- If the visitor already exists in Salesforce, then update the current contact and/or attach the

ongoing chat as a case under the contact when the chat ends. In such case, you should choose one of the following update rules:

- Do not update the contact.
Comm100 will not update the existing contact information with data collected from live chat. The only option is to attach the ongoing chat to the current contact when the chat is ended.
- Update the contact with information from live chat.
Comm100 will interact with Salesforce and acquire all fields under this contact, and then re-assign values to all these fields. This is done with the information collected from the live chat channel by your pre-configured field mapping rules.
- Only add new information (Do not overwrite existing information.)
Comm100 will interact with Salesforce and acquire all fields under this contact, and then assign values to blank fields with information collected from the live chat channel by your pre-configured field mapping rules.

2. Create/Update Contact & Attach Task

This process is the same as the process within **Create/Update Contact & Attach Case**. Identification rules will first run to check whether the visitor exists in Salesforce.

- If the visitor doesn't exist in Salesforce, Comm100 will automatically create a new contact for you based on your predefined field mapping rules and attach the ongoing chat as a task when the chat ends.
- If the visitor already exists in Salesforce, Comm100 will update the current contact as per one of the following rules you've selected, and then attach the ongoing chat as a task under the contact.
 - Do not update the contact
Comm100 will not update the existing contact information with data collected from live chat, but only attach the ongoing chat as a task to the current contact when the chat is ended.
 - Update the contact with information from live chat
Comm100 will interact with Salesforce and acquire all fields under this contact, and then re-assign values to all these fields. This is done with the information collected from the live chat channel by your pre-configured field mapping rules.
 - Only add new information (Do not overwrite existing information)
Comm100 will interact with Salesforce and acquire all fields under this contact, and then assign values to blank fields with information collected from the live chat channel by your pre-configured field mapping rules.

3. Create Case

You can also choose to create an independent case for each chat; in this scenario, the case belongs to no contact.

4. Create Lead & Attach Task

This option requires object identification to confirm whether or not the visitor exists in Salesforce. If so, simply attach the ongoing chat to the current lead when the chat ends.

If not, add the visitor into Salesforce as a lead and attach the ongoing chat to it when the chat ends. When creating the lead, Comm100 will automatically assign values to the fields based on your pre-defined field mapping rules.

5. Do Nothing

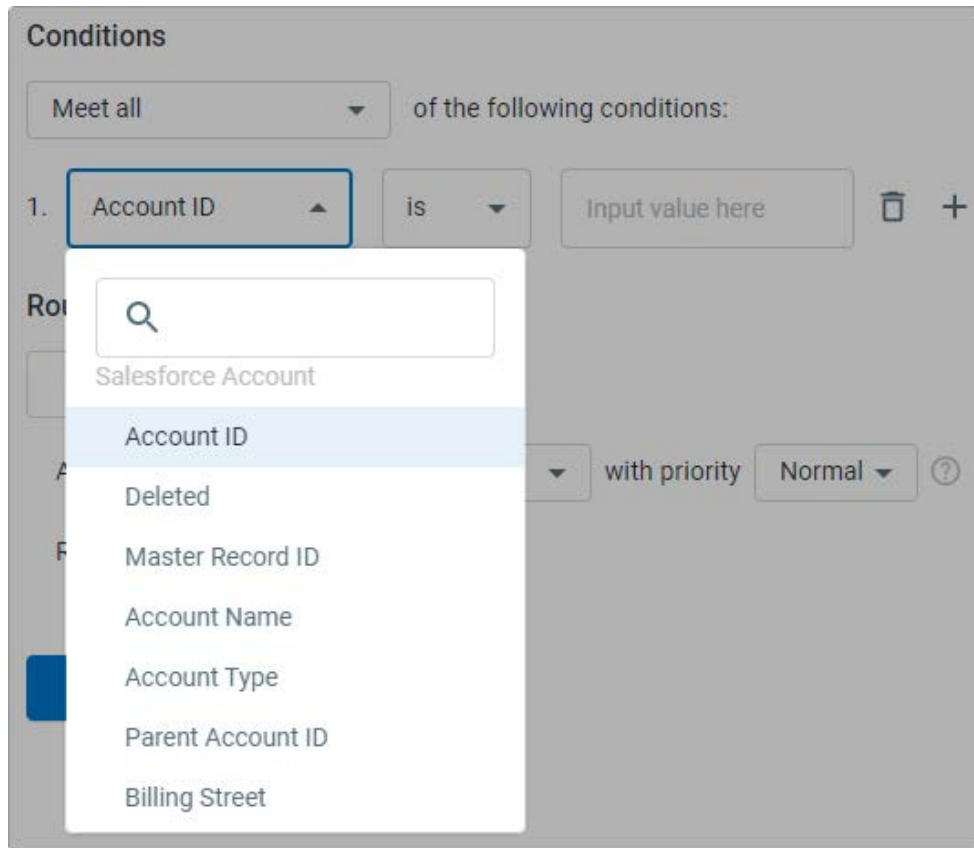
If you choose this option, the automatic process will not take place, meaning no objects will be created or updated when a chat ends or an offline message is submitted.

Please note that you can only choose one option for the automatic process.

Create Chat Routing Rules with Salesforce Fields

Comm100 Live Chat collects visitor data from multiple channels (pre-chat form, [custom variables](#), web page, etc.) and allows you to define different chat routing rules with the data collected. This helps allocate chat requests to the right agents or departments, thus greatly enhancing your chat efficiency and customer experience.

When the integration with Salesforce is enabled, all visible fields of your Salesforce account and contact will be displayed in the same order in Comm100 Live Chat for you to choose from when defining chat routing rules. A typical scenario would be if you know the account managers of the contacts from Salesforce, then you can directly route a visitor to his/her account manager.



Set up Object Identification & Field Mapping Rules

Through the integration between Comm100 Live Chat and Salesforce, you can complete a variety of functions. For example, you can access existing Salesforce customer information within the Comm100 agent console; you can create Salesforce objects manually in the agent console; and Comm100 can automatically create Salesforce objects for you when a chat ends or an offline message is submitted.

To do any of the above, we need several rules running in the background to make sure all of these tasks get completed correctly.

Object Identification Rules

Our deep integration with Salesforce helps you quickly locate an existing customer by data collected from the live chat channel. The screenshot below shows the configuration items of identification rules.

Identification Rules for Salesforce Account, Contact and Lead

Use the following rules to identify Salesforce Contacts/Leads

Identify contacts by mapping:

Comm100 field Email	Salesforce field Email	🗑️	+
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or

Comm100 field Phone number	Salesforce field Phone number	🗑️	+
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If no contacts are found, identify leads by mapping:

Comm100 field Email	Salesforce field mail	🗑️	+
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or

Comm100 field	Salesforce field	🗑️	+
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Contact/Lead Match

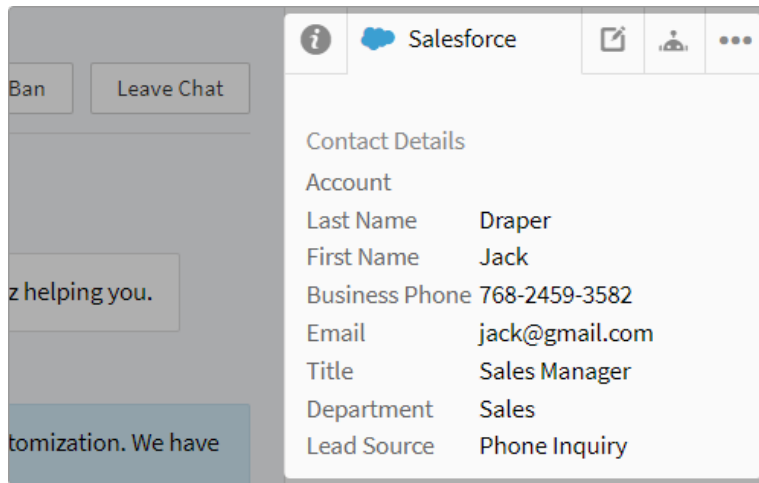
You can see from the above screenshot that **by default Comm100 uses customer email as a mapping condition** between Comm100 Live Chat and Salesforce.

In addition to email address, visitor data collected from multiple channels (pre-chat forms, website, login systems, etc.) in Comm100 Live Chat can all be used to set up the object identification rules. This means your website, login system, live chat and Salesforce are all linked up and you can easily deliver a consistent customer experience.

Comm100 allows you to add one or two more mapping conditions (up to three in a total) to identify contacts or leads more accurately.

Once a chat session is established, Comm100 will contact Sales- force to see if there is an existing contact with the same fields. If so, the matched contact information will be displayed in the Salesforce tab in Comm100 agent console and the mapping is ended.

Otherwise, Comm100 will continue using the pre-defined mapping field to check if there is any existing Sales- force lead. If a lead is found, the relevant lead information will be displayed in the Salesforce tab in Comm100 agent console. If no leads are found, then the mapping is ended.



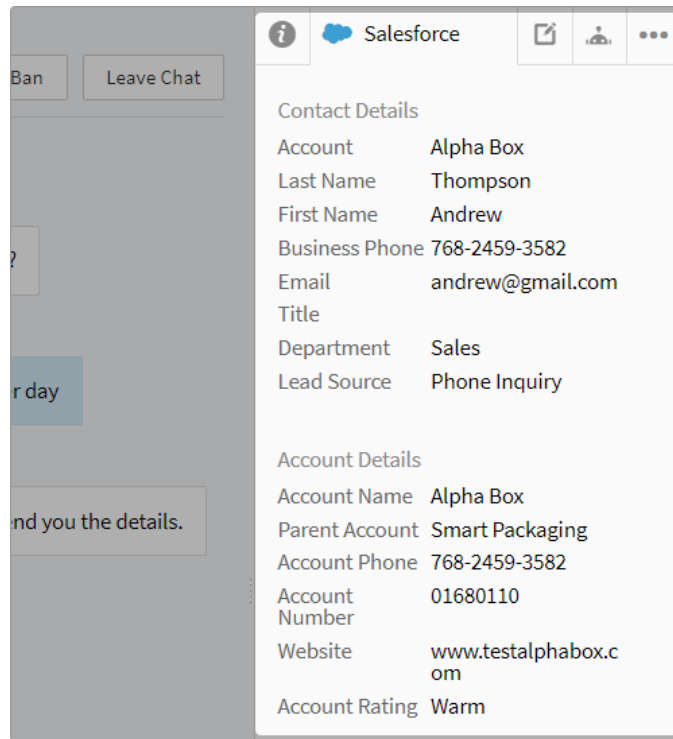
If multiple results are found for mapping, the first contact/lead listed will be displayed in the Comm100 agent console.

Account Match

You can also use visitor data collected from multiple channels (pre-chat forms, website, login systems, etc.) to map to all your Salesforce account fields to identify existing customers.

If any account is matched by the mapping rules you have defined, then the relevant account information will be displayed in the Salesforce tab of the Comm100 agent console.

Even if no rules are defined here, when an existing contact is matched, Comm100 will also check for the account information related to this contact. If an account is found for that contact, the account information will also be displayed in the Salesforce tab in Comm100 agent console.



Field Mapping between Comm100 Live Chat and Salesforce

One of the main purposes of this integration is to synchronize customer data collected from the live chat channel into Salesforce for unified customer management. But how is data synchronization achieved? We do it by field mapping between Comm100 Live Chat and Salesforce.

As you may know, there are many object types in Salesforce indicating different customer roles. In the integration, we will discuss the five main object types:

- Contact
- Account
- Lead
- Case
- Task

Each object has multiple related fields.

In Comm100 Live Chat, we have the following field categories for you to choose from for field mapping:

- **Visitor information**

Fields include Name, Email, Visit Times, and Chat Times.

- **Session information**

Fields include IP, Country/Region, State/Province, City, Search Engine, Search Keywords, Browser, Operating System, Flash Version, Screen Resolution, Time Zone, Language, Referrer URL, Current Page URL, and Landing Page URL.

- **Custom variables**

You can define as many custom variables as you need in Comm100 Live Chat. Typical fields may include Account Number, Purchased Items, Order ID, etc.

- **Pre-chat fields**

All visible fields in the pre-chat form, including system fields, such as Phone, Company, Department, Product/Service and custom fields.

- **Chat information**

Fields include Requesting Page URL, Start Time, End Time, and Transcript.

See the screenshot below for the configuration items:

Object Field Mapping and Display in Comm100

Contact

Salesforce Object	Salesforce Field	Comm100 Field	Display in Agent Console
Contact	Id	Select...	<input type="checkbox"/>
Contact	IsDeleted	Select...	<input type="checkbox"/>
Contact	MasterRecordId	Select...	<input type="checkbox"/>
Contact	AccountId	Select...	<input checked="" type="checkbox"/>
Contact	LastName	Name	<input checked="" type="checkbox"/>

[Show more](#)

You may notice that some Comm100 fields are already matched to a corresponding Salesforce field, while others are not. This is because we have default mapping relationships that you can view in the table below:

SALESFORCE OBJECT	SALESFORCE FIELD	COMM100 FIELD
Contact	LastName	Visitor Name
	Phone	Pre-Chat Phone
	Email	Visitor Email
	Department	Pre-Chat Department
Lead	LastName	Visitor Name
	Phone	Pre-Chat Phone
	Email	Visitor Email
	Company	Pre-Chat Company
Case	SuppliedName	Visitor Name
	SuppliedEmail	Visitor Email
	SuppliedCompany	Pre-Chat Company
	SuppliedPhone	Pre-Chat Phone
	Description	Transcript
Task	Description	Transcript

Conclusion

Comm100 Live Chat Salesforce integration enables easy access to customer information directly in the agent console, as well as convenient data synchronization from live chat to your customer management system. Through this integration, you can enrich your customer database with information from multiple channels, which in turn will help you deliver an outstanding customer experience.



Let's chat

Comm100 is a leading global provider of omnichannel customer experience solutions with a mission to make online service and support delivery more genuine, more personalized, and more productive through meaningful conversations. Let us show you how.

[Learn more](#)