MS DYNAMICS Integration Guide

LiveEngage CRM Widget

by LivePerson, INC

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Version Management

Date	Version	Owner	Change History
5/23/2017	1.0	Jason Kadarusman	Document Creation
5/26/2017	1.1	Estefania Londono	Update Documentation
11/12/2018	1.3	Luciano Buhler	Update links and references
03/20/2019	1.4	Luciano Buhler	Documentation updated according to new standardized template
03/27/2019	1.5	Luciano Buhler	Updated the sequence of the Document.
06/04/2019	1.6	Luciano Buhler	Updated the Azure configuration.

Introduction

The CRM Widget offers integration and communication between LiveEngage 2.0 and most popular CRM platforms such as Zendesk, Netsuite, Microsoft Dynamics, Sugar, etc. This guide will walk you through the steps to install, configure and use the Microsoft Dynamics Widget. The LiveEngage MS Dynamics Widget will allow viewing MS Dynamics information, the creation of tickets, and attaching chat transcripts to the tickets, inside LiveEngage platform.

If you are currently subscribed to other or different CRM, please contact your Account Manager to obtain the correct User Guide.

Supported LE Channels

Chat

Set Up Guide

In this session, the required settings are listed so that the CRM Widget can work with Microsoft Dynamics.

Overview

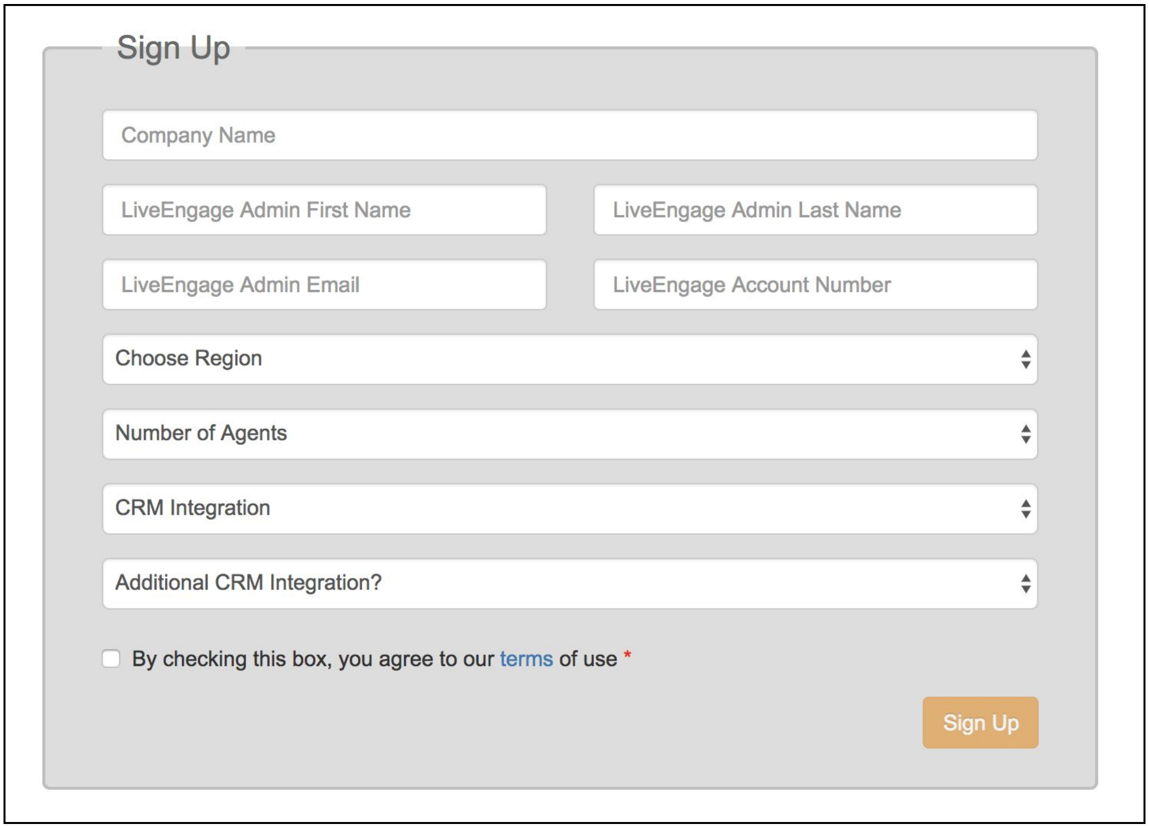
Below is an overview of the required widget settings:

- Widget Sign Up
- Configuring the CRM in the Widget Admin-Panel
- Configure CRM

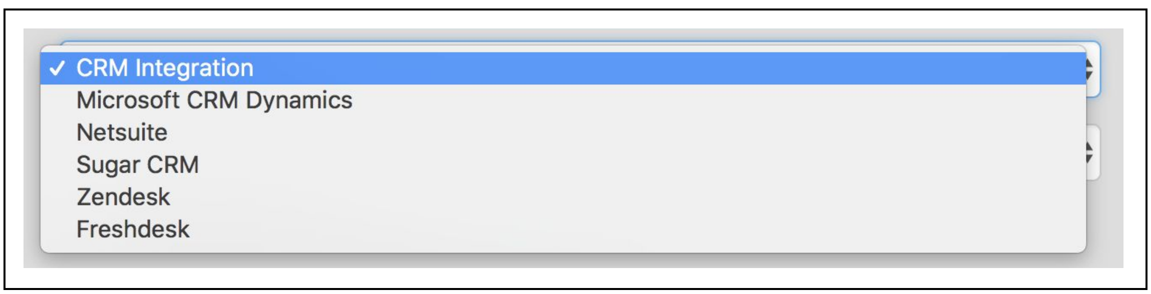
Widget Sign Up

It is easy to sign up to CRM Widget, visit the installation URL, fill out the form and click Sign UP button or access directly the link https://lpcrm.fs.liveperson.com/signup. Once approved, you will receive account credentials to login to the admin panel and complete the connection configurations with the MS Dynamics.

1. Go to the signup URL: https://lpcrm.fs.liveperson.com/signup



2. Make sure you choose the right CRM within the "CRM Integration" drop-down



3. Once you've signed up and gone through the approval process by a Liveperson Account Manager (within 1 business day), you will receive an email (please check your SPAM/Junk folder) from: **CRM Widget SignUp No-Reply<crmwidget@liveperson.com>**, with subject: **Your CRM Widget Admin Portal Information**
4. The email will provide credentials required to access the admin panel, where you could continue to configure the CRM Widget for your business use

Configuring the CRM in the Widget Admin-Panel

Access the CRM Widget Admin Panel

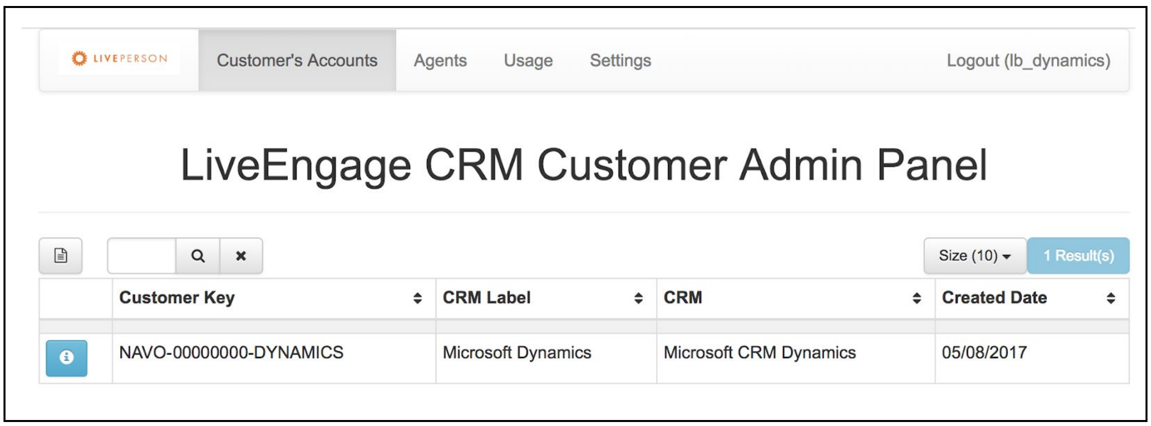
1. Make sure you receive the username and password from your Account Manager.
2. Go to the installation URL: https://lpcrm.fs.liveperson.com/admin-panel

Customer's Accounts

Link: Admin Panel → Customer's Accounts

Navigate the URL to update/change the license configuration:

a. From Menu -> Customer's Accounts
b. Review your CRM Widget Customer Key

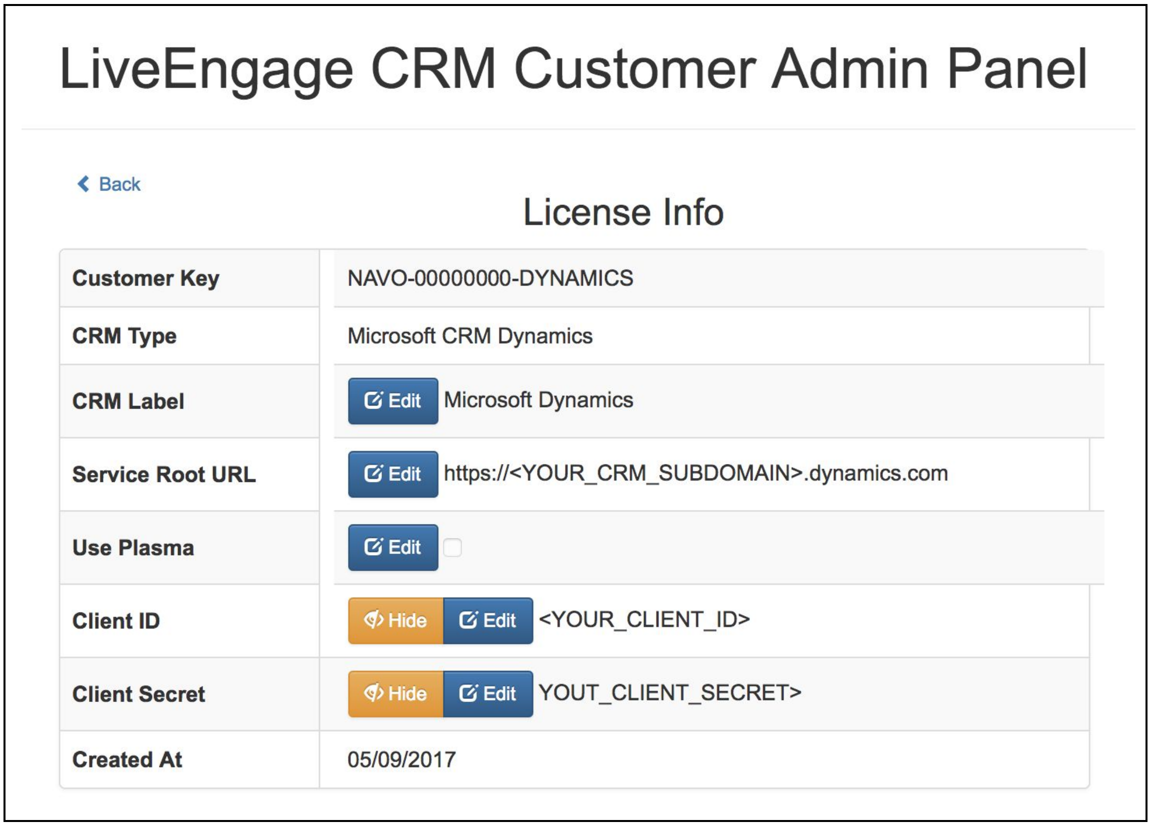


c. Click on the "info" icon next to the details of the customer key to modify connection to your CRM instance. Will be opened the License Info window.

License Info

Link: Admin Panel → Customer's Accounts → (License Info)

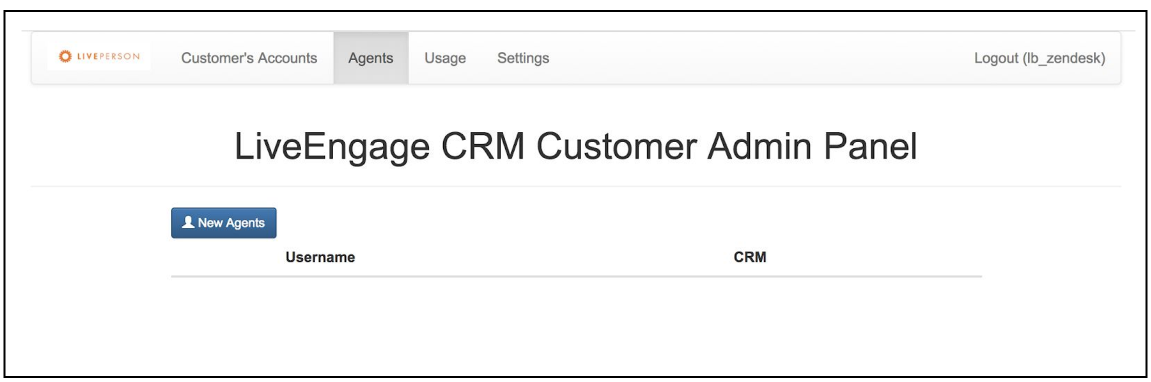
Here must be configures the connection to your CRM account. This is detailed in the next section Customer Accounts.



Agents (Deprecated)

Link: Admin Panel → Agents

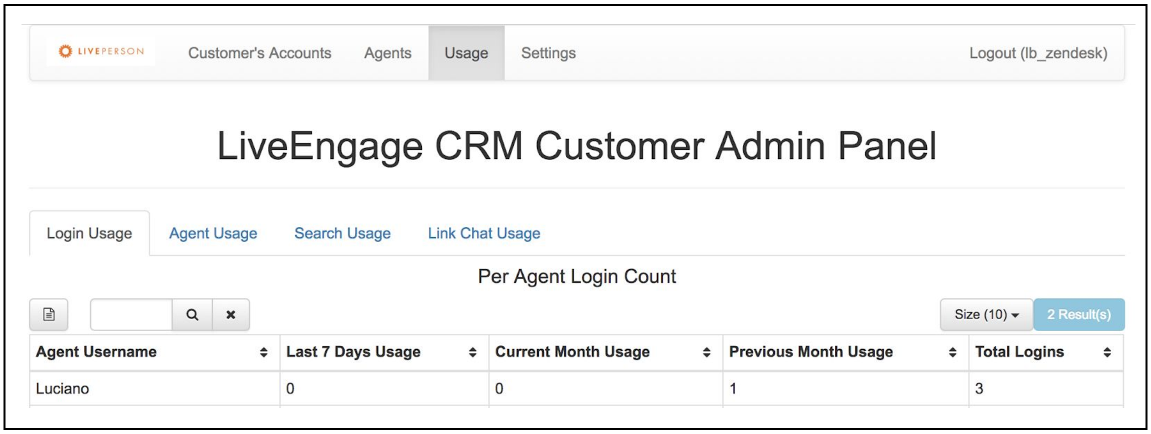
This session will not be addressed as it is deprecated



Usage

Link: Admin Panel → Usage

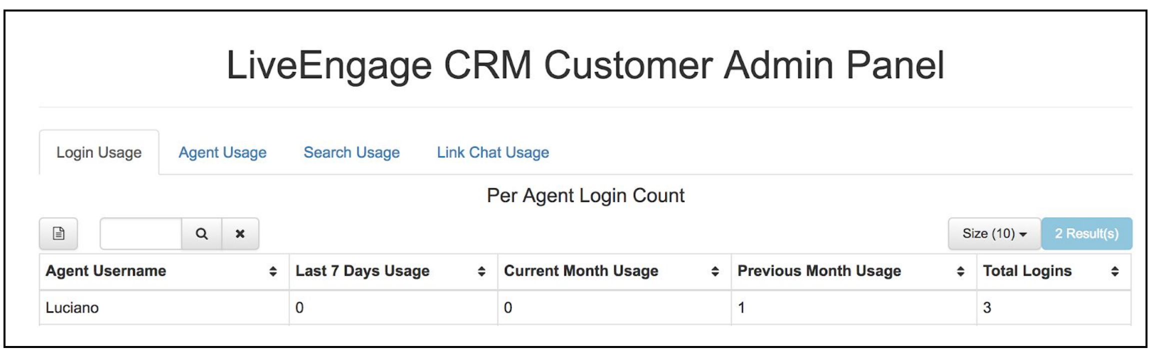
See the follow usage statistics from the account:



Login Usage

See the login statistics from each Agent by:

- Last 7 Days
- Currently Month
- Previous Month
- Total Logins

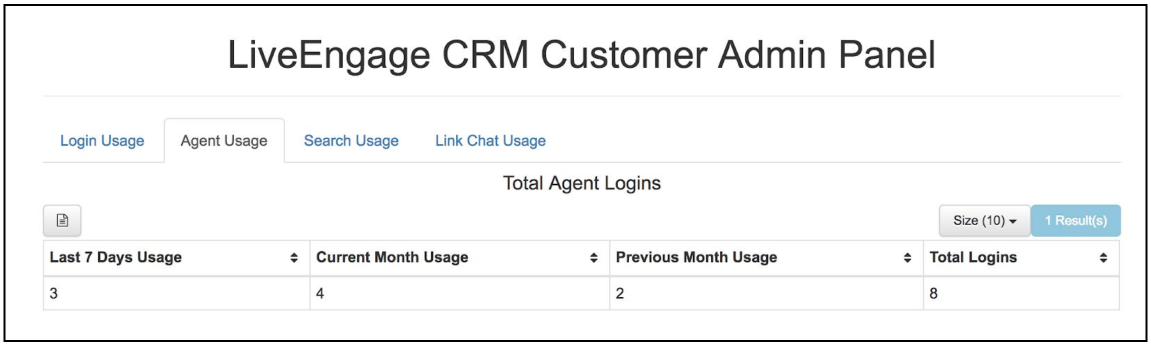


Agent Usage

See the login statistics from all Agents by:

- Last 7 Days
- Currently Month
- Previous Month

- Total Logins

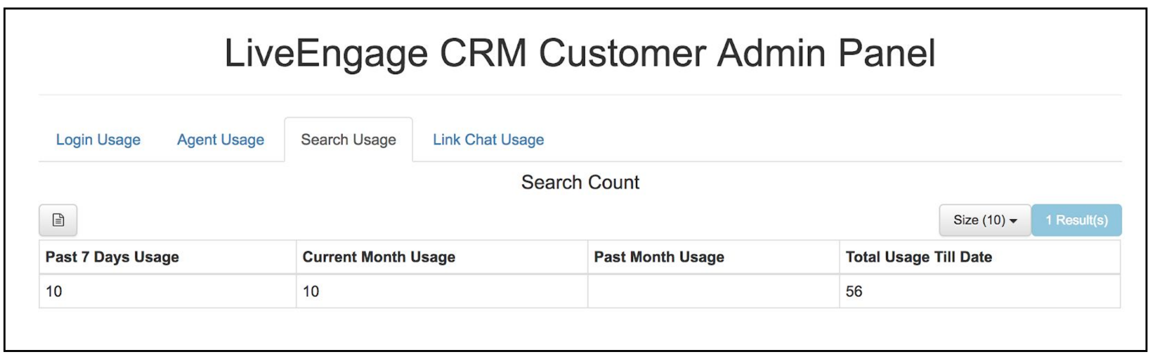


Last 7 Days Usage	Current Month Usage	Previous Month Usage	Total Logins
3	4	2	8

Search Usage:

See the search statistics from all Agents by:

- Last 7 Days
- Currently Month
- Previous Month
- Total Usage Till Date

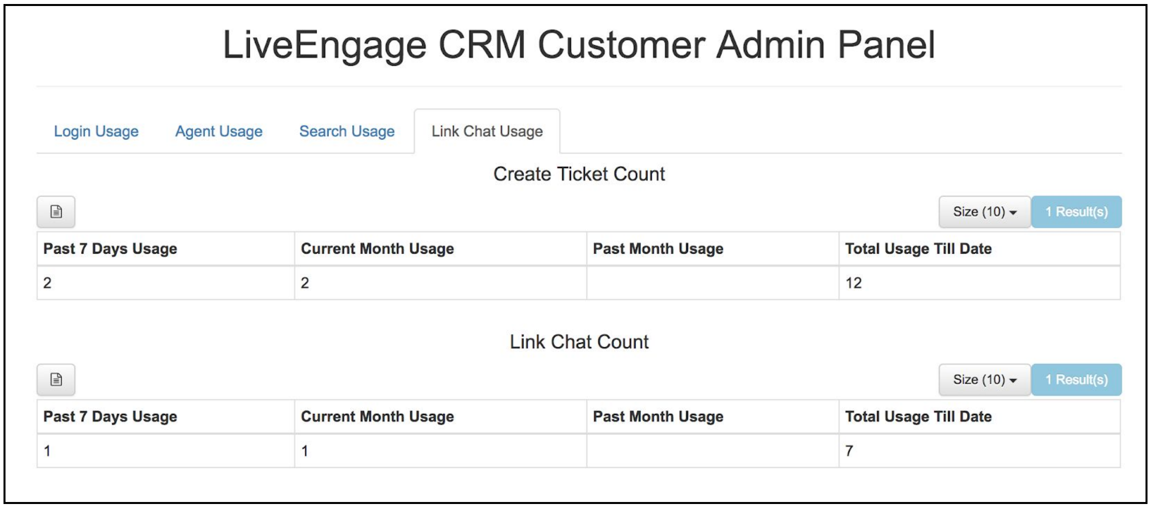


Past 7 Days Usage	Current Month Usage	Past Month Usage	Total Usage Till Date
10	10		56

Link Chat Usage:

See the Case and the Link Chat statistics from all Agents by:

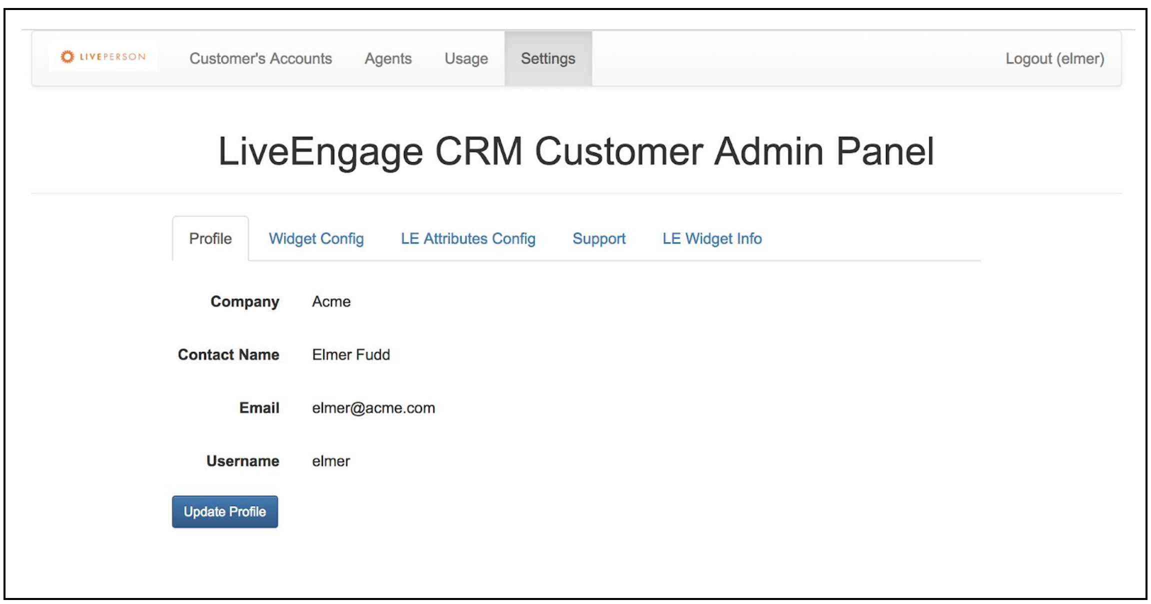
- Last 7 Days
- Currently Month
- Previous Month
- Total Usage Till Date



Settings

Link: Admin Panel → Settings

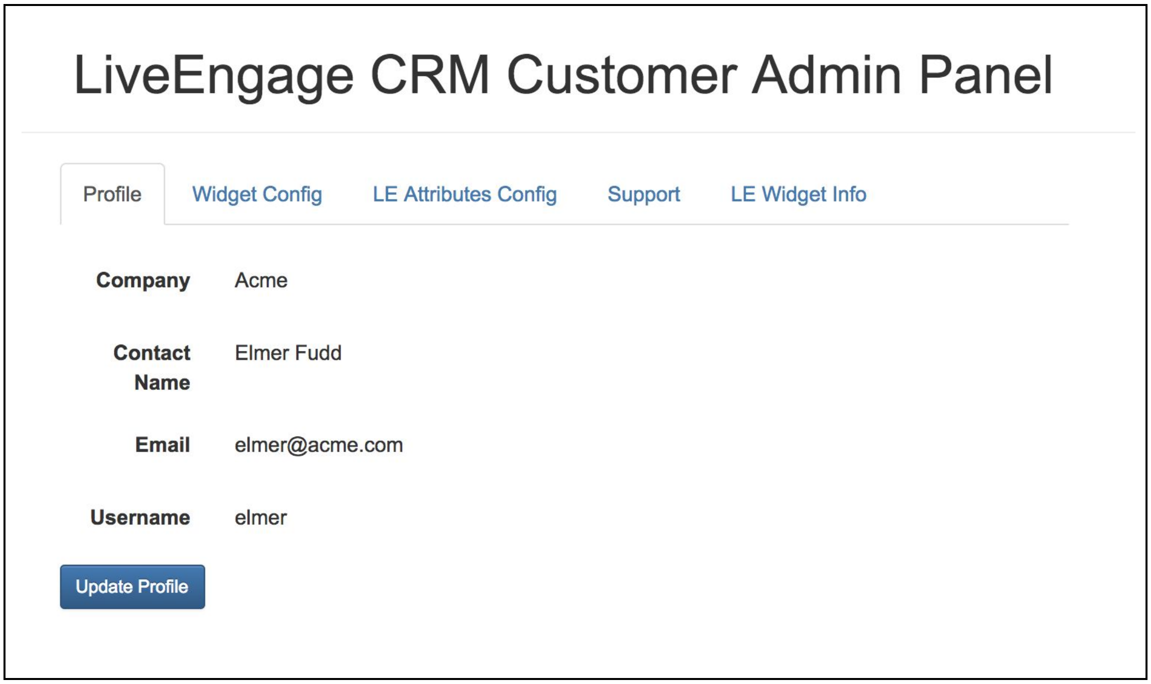
Here you can check and update your profile information.



Profile

Link: Admin Panel → Settings → Profile

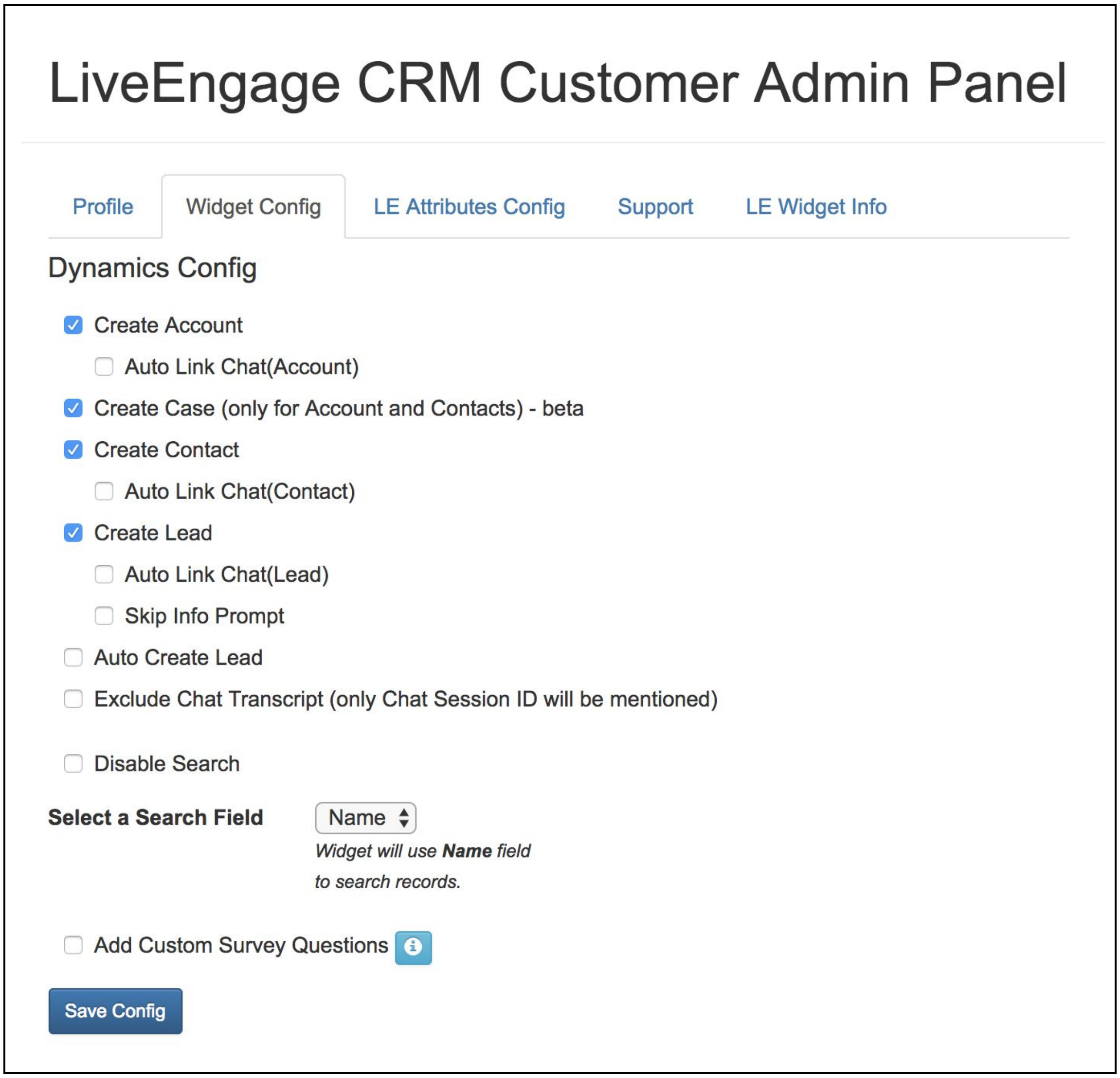
Here can verified your company profile information.
To update/change company profile information: Company Name, Contact Name, Email, Username, and Password.



Widget Config

Link: Admin Panel → Settings → Widget Config

This is detailed in the section Widget Config.



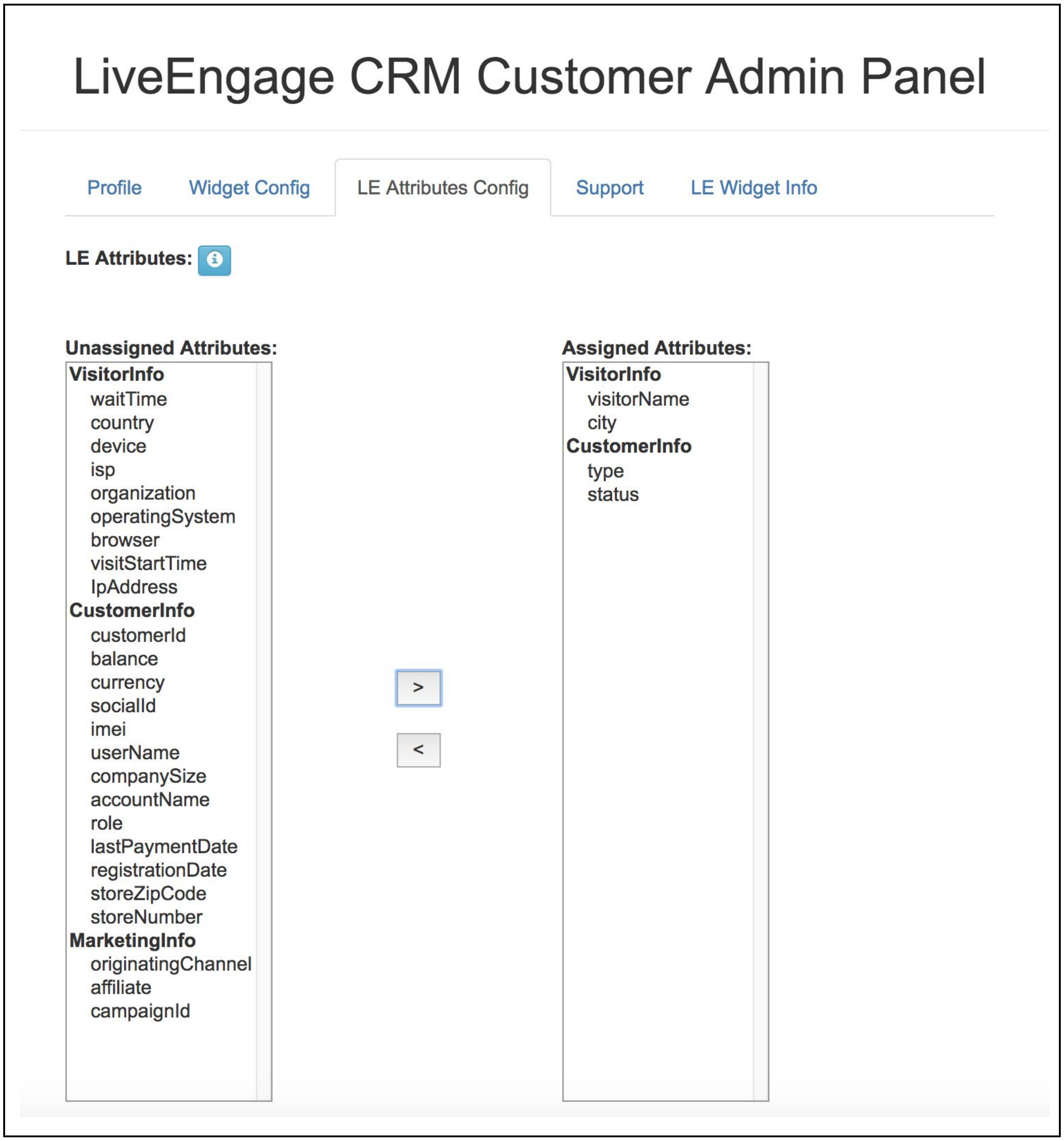
LE Attributes Config

Link: Admin Panel → Settings → LE Attributes Config

The LE Attributes are Live Engage variables that can be captured by Widget during an engagement. The complete list is in the table called Unassigned Attributes.

- To access complete list, click on button LE Attributes:
- To add to capture, please select an attribute(s) from Unassigned Attributes table and drop it to Assigned Attributes table using >
- To remove, please select an attribute(s) from Assignee Attributes table and click < .

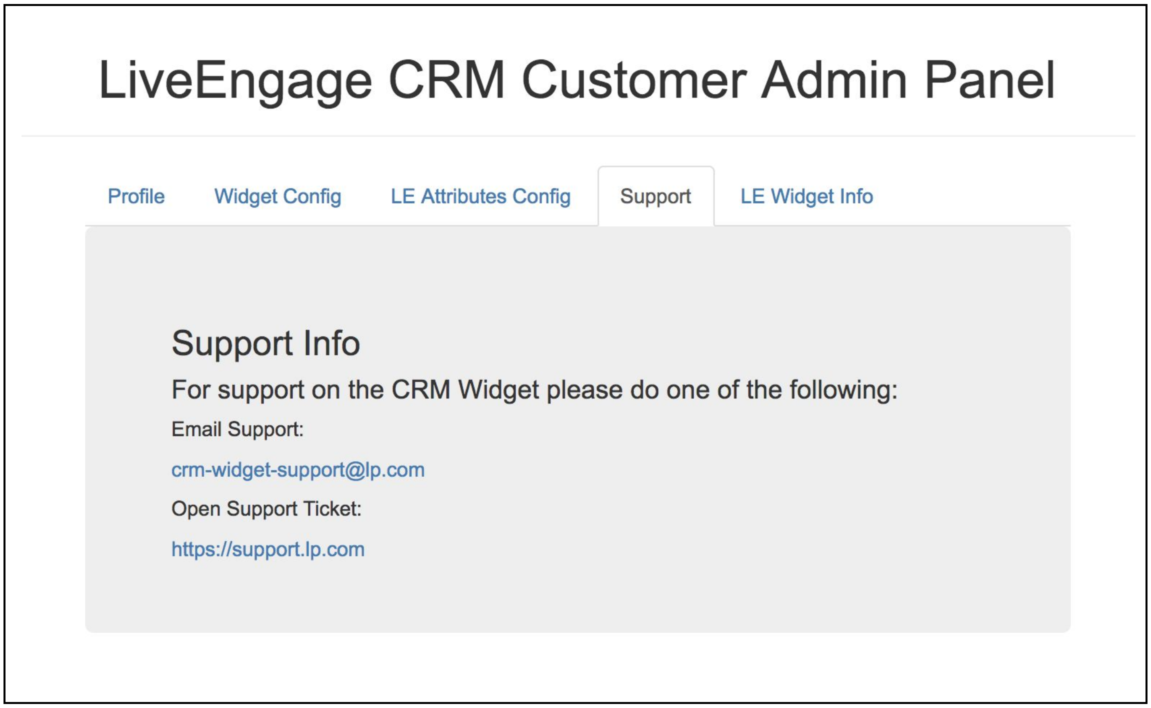
Note! For default, no one attribute is captured by Widget.



Support

Link: Admin Panel → Settings → Support

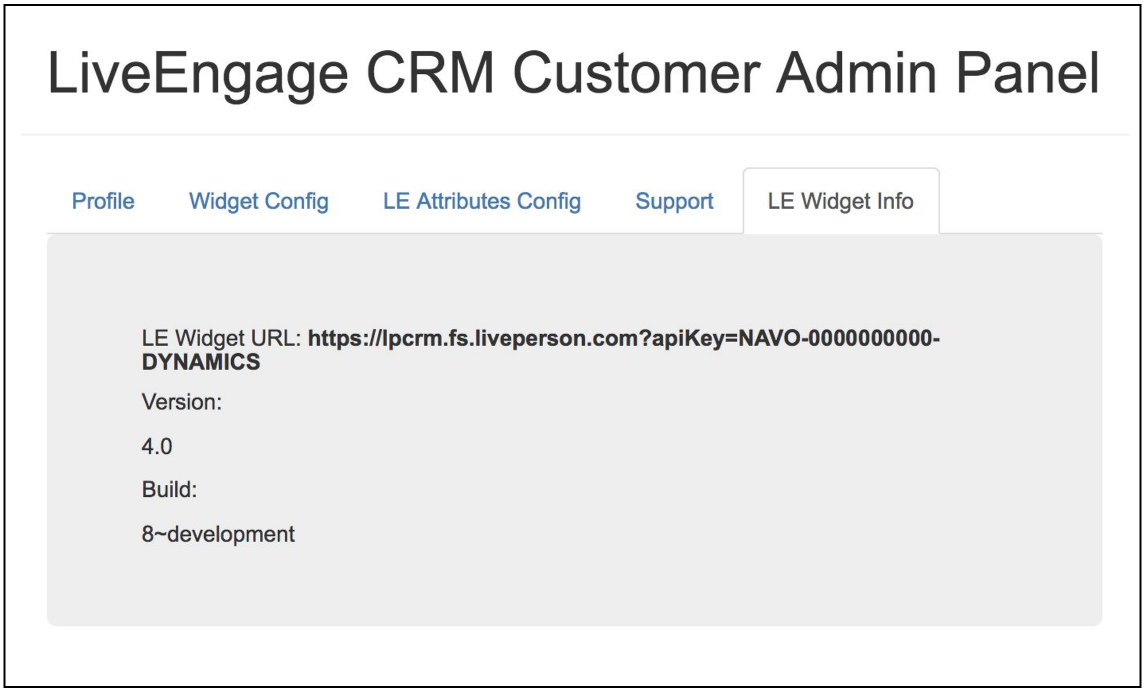
See support email and process to open a ticket for support.



LE Widget Info

Link: Admin Panel → Settings → LE Widget Info

See the LE Widget URL that will be required to setup the widget within LiveEngage.
Version and Build of Widget can also be viewed within this tab.

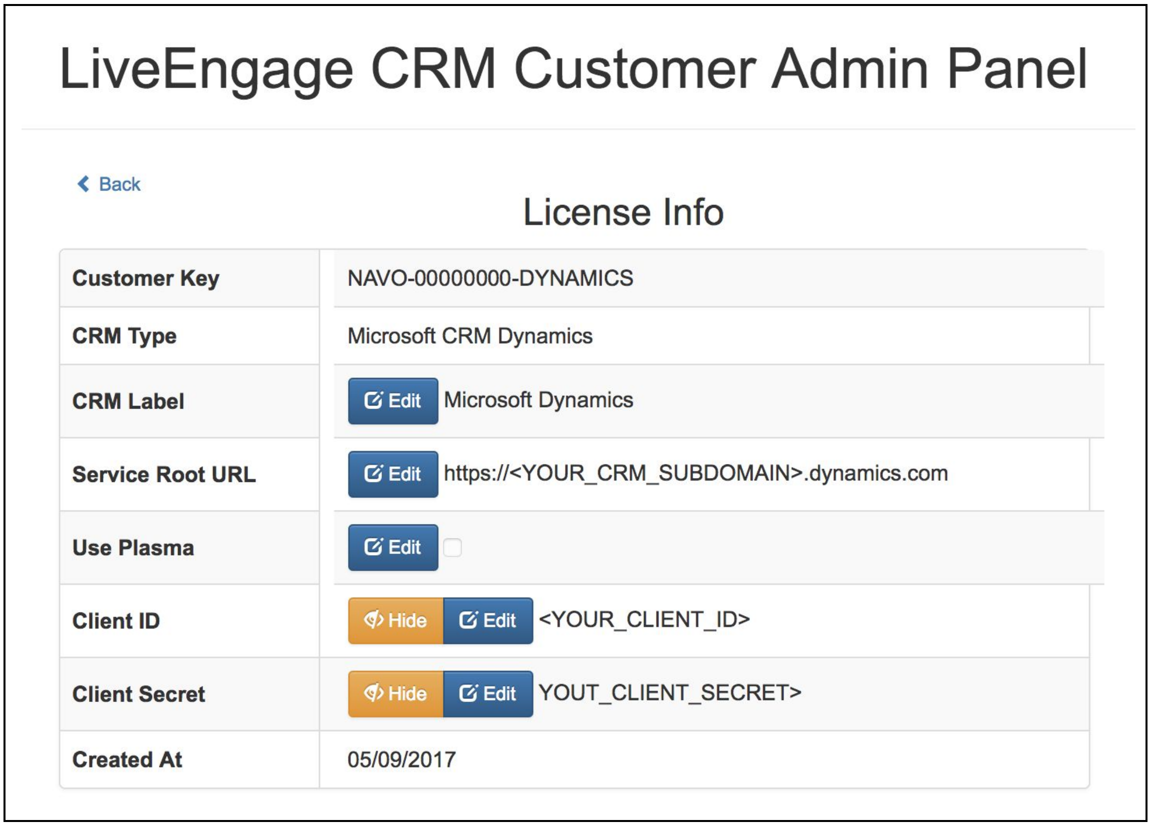


Customer Accounts

Link: Admin Panel → Customer's Accounts

The **Customer Accounts** tab enables you to view and edit information about your license:

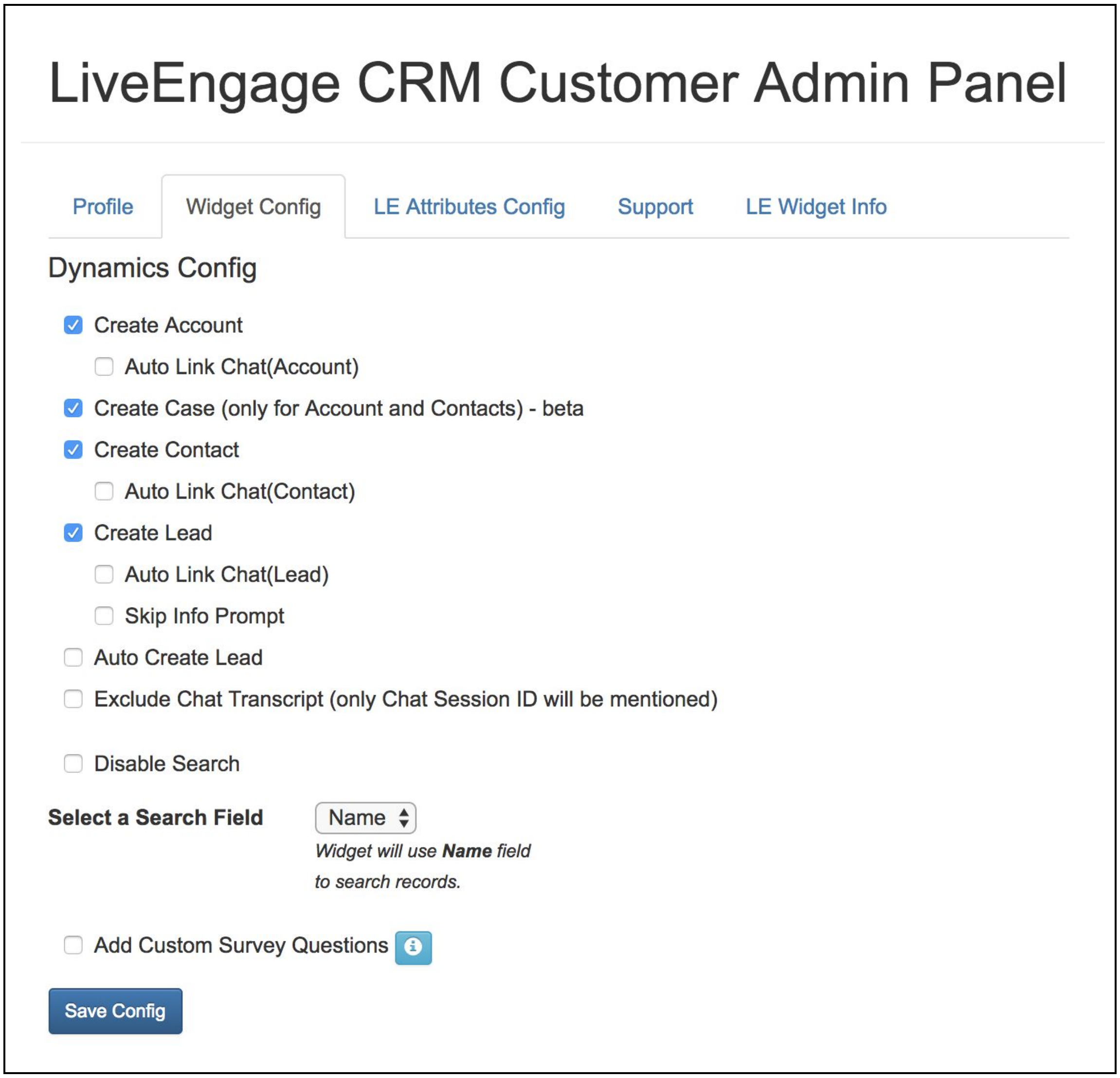
- Customer Key: This value is used to identify the license in the Live Engage.
- CRM Type: Which CRM is registered to this license.
- CRM label: Name to identify the current license.
- Service Root URL: [Service Root URL from Dynamics Developer Resources]() (Point "3")
    - EX: https://<your_subdomain>.api.crm.dynamics.com
- Use Plasma: Only to use Microsoft Plasma instances.
- Client ID: [Application ID value from Azure Active Directory setup]() (Point "4")
- Client Secret: [Client Secret value from Azure Active Directory setup]() (Point "3")



Widget Config

Link: Admin Panel → Settings → Widget Config

This section shows how to update/change the Widget Configuration:



- Enabling/disabling entities that can be created within MS Dynamics:
    - Create Account
    - Create Case
    - Create Contact
    - Create Lead

- Enabling/disabling how chat transcript are to be linked/created within the Notes section enabled entities.
    - Auto Link Chat (Account)
    - Auto Link Chat (Contact)
    - Auto Link Chat (Lead)
    - Skip Info Prompt
    - Exclude Chat Transcript (only Chat Session ID will be mentioned)

- Auto Create Lead
- Enabling/disabling Search
- Select a Search Field:
    - Name
    - Email
    - Phone
- Add Custom Survey Questions

This provides the ability to add custom pre-chat survey questions. If the LiveEngage pre-chat survey contains custom questions and needs an answer to map over to the widget form, please add those questions here.
Standard pre-chat survey questions are Name, Email, and Phone. Others are custom questions.

Example:
Survey Question: What is your company name?(This is the same as the pre-chat survey question in the LiveEngage)
Question Field: Company (This is the widget form field)

Configure CRM

This section describes how to configure MS Dynamics to allow our CRM Widget to access your data through web services API.

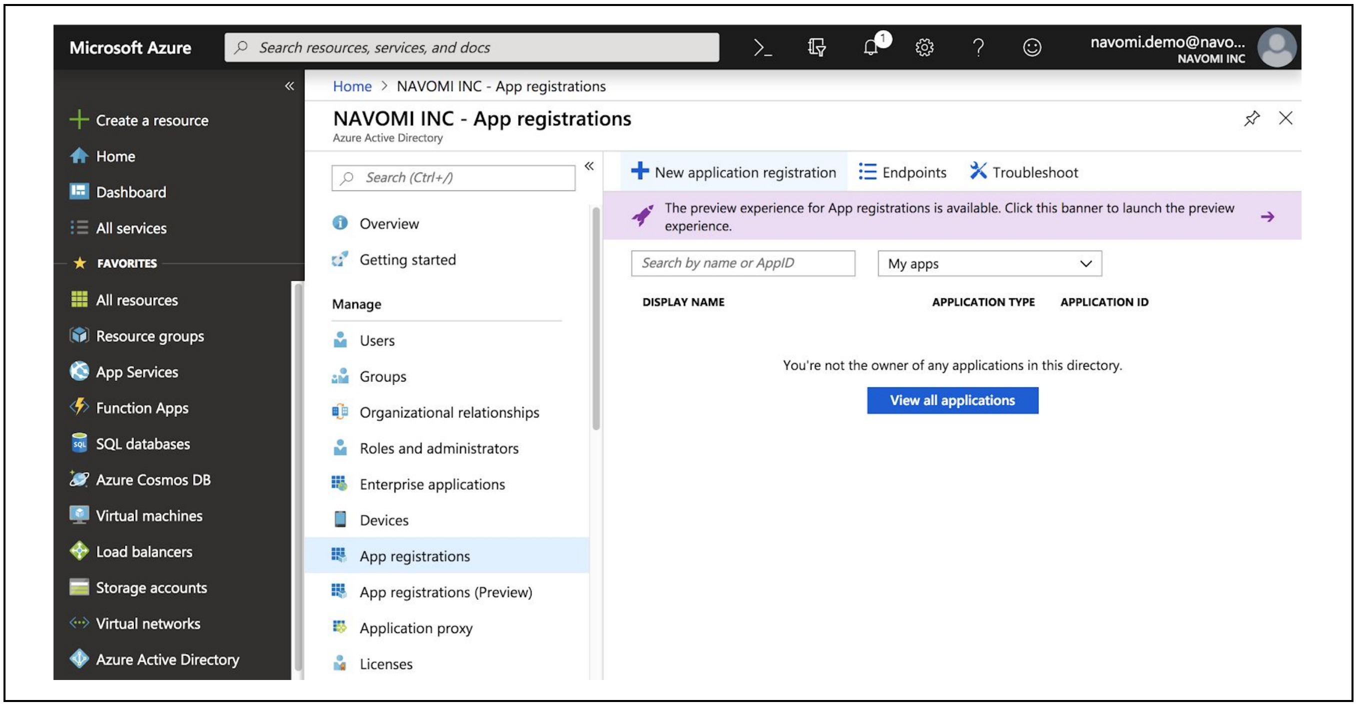
Azure Active Directory

For the CRM Widget to gain access to Microsoft Dynamics, an Azure Active Directory is required as part of the setup. Azure Active Directory allows for seamless OAuth v2.0 integration, so that profile level permissions could be applied, and a trusted third-party application (CRM Widget) is registered to access the necessary components of Microsoft Dynamics.

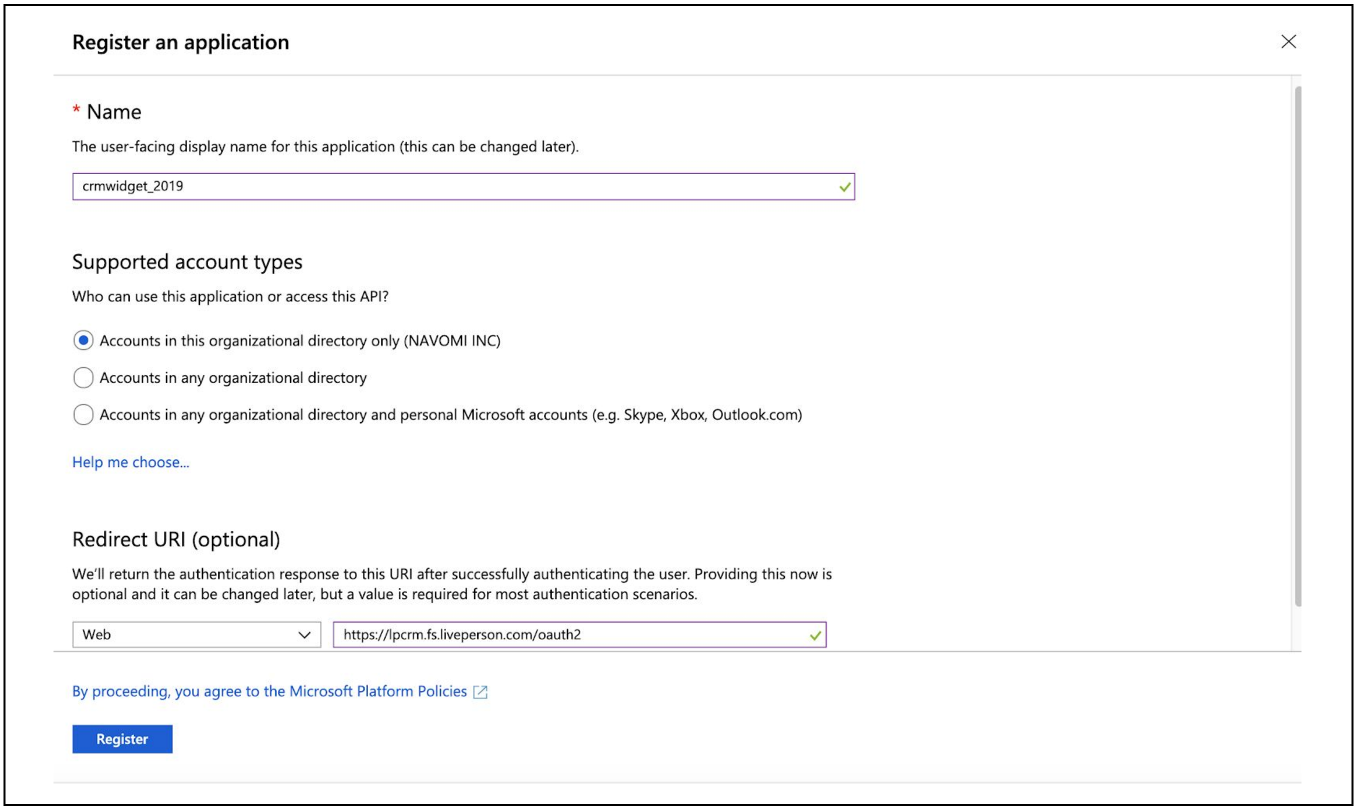
App Registration

1. Login into Azure Portal.

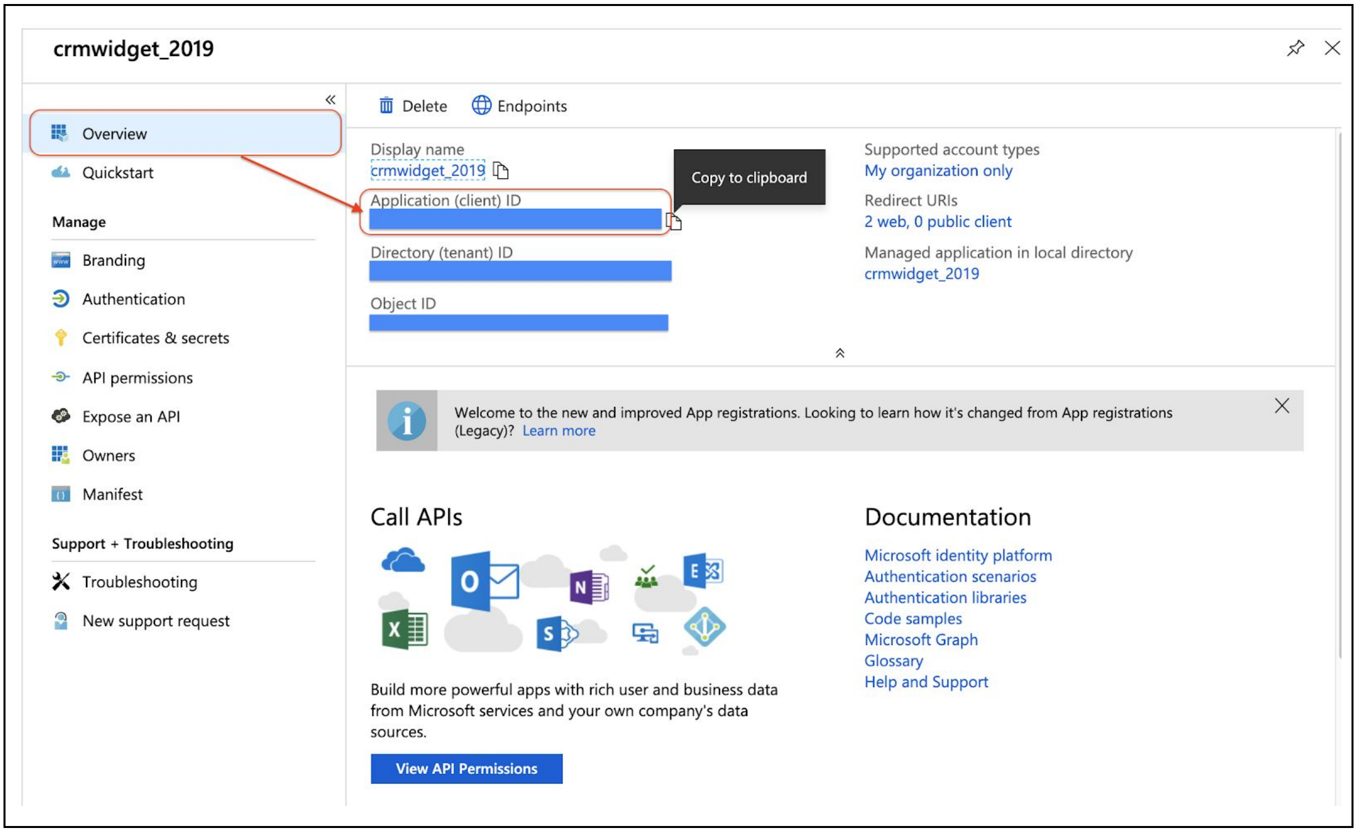
2. Go to Microsoft Azure Menu -> Azure Active Directory -> App Registrations -> New Application Registration:



3. Complete the App form and click “Create”. You will need the following information:
   a. Name = <YOUR_CLIENT_NAME>
      i. Example: [le_crmwidget]
   b. Redirect URI = Web
      i. Select this value.
   c. Redirect URI = https://lpcrm.fs.liveperson.com/oauth2
      i. Copy and paste this value.
   d. Click on the Register button

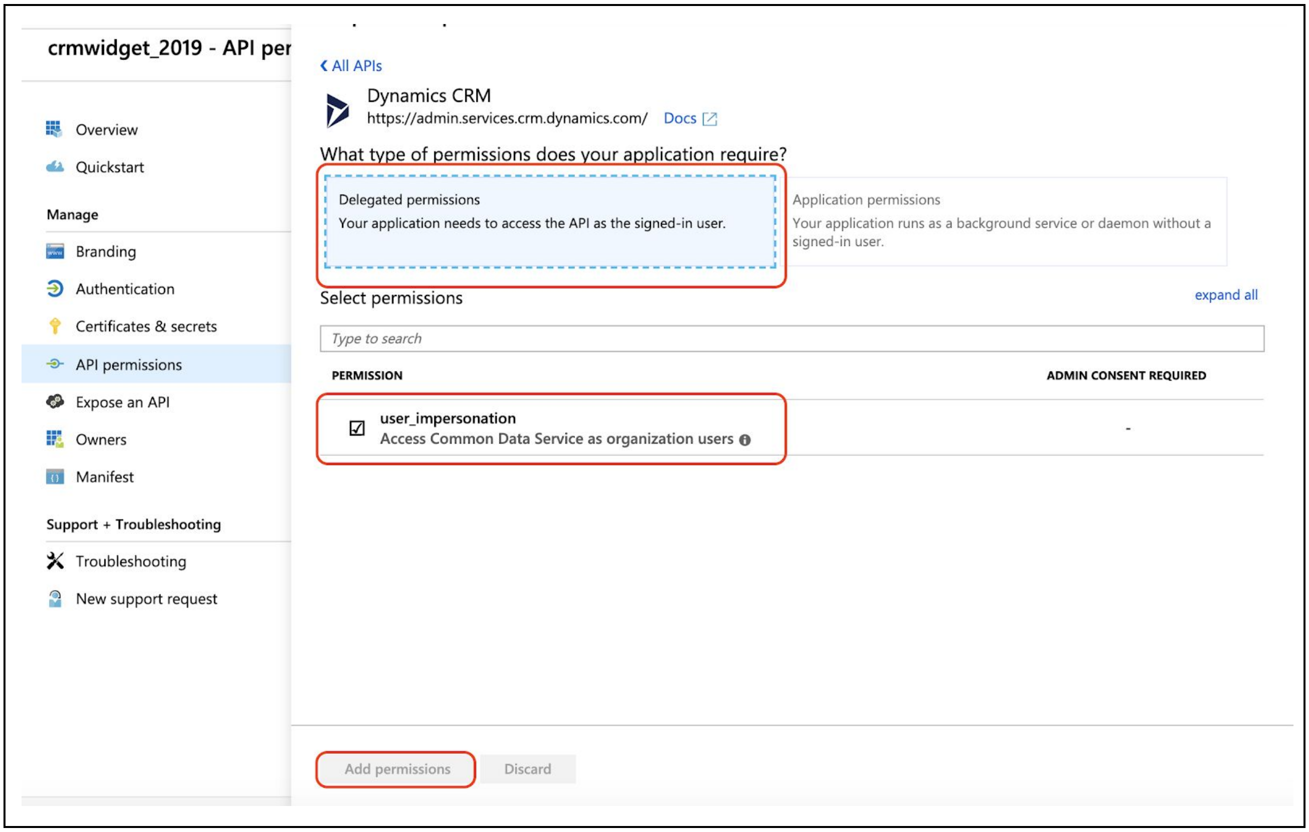


4. After you enter the above info, an entry will be created. In this example it is "CRMWIDGET_2019". Click on "Overview" and copy the "**Application ID**", you will need this later in the setup:



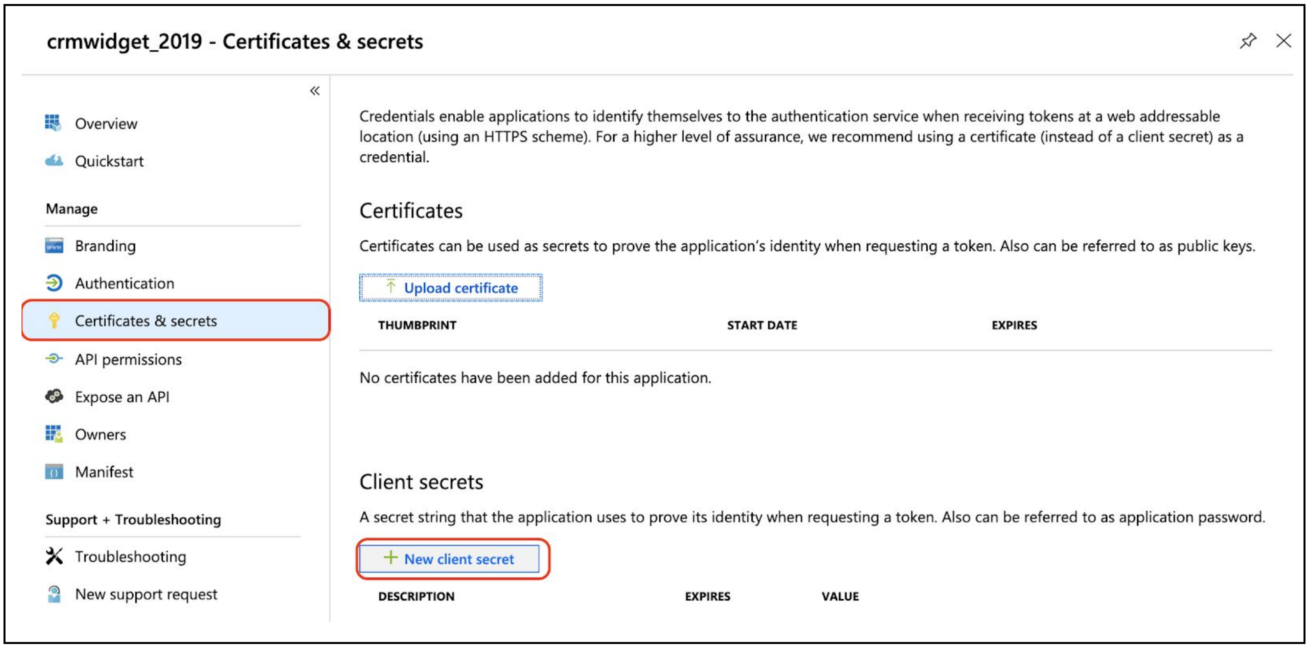
Permissions

1. Click on "API permissions" and click on "Add a permission" button, then select "Dynamics CRM".
2. Select "Delegated Permissions" and "user_impersonation". Click on "Add permissions"



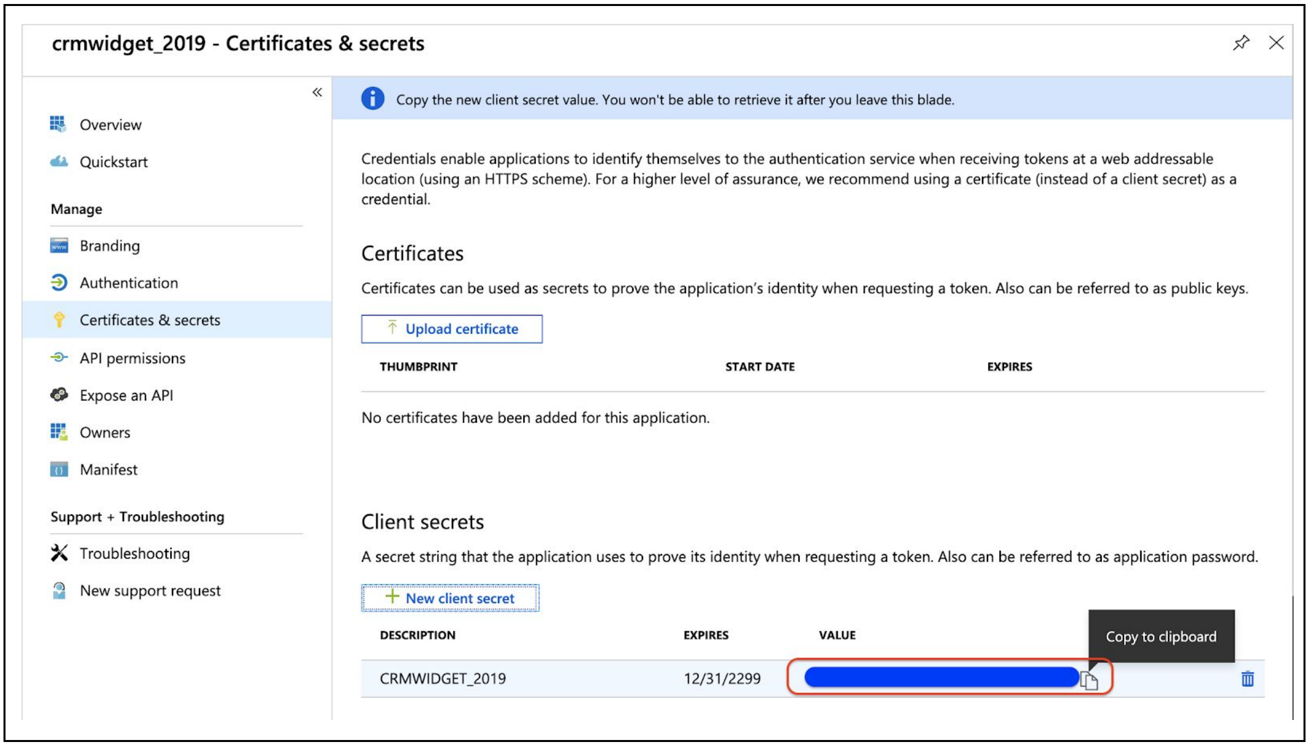
Client Secret

1. Click on "Certificates & Secrets Button" and "New client secret":



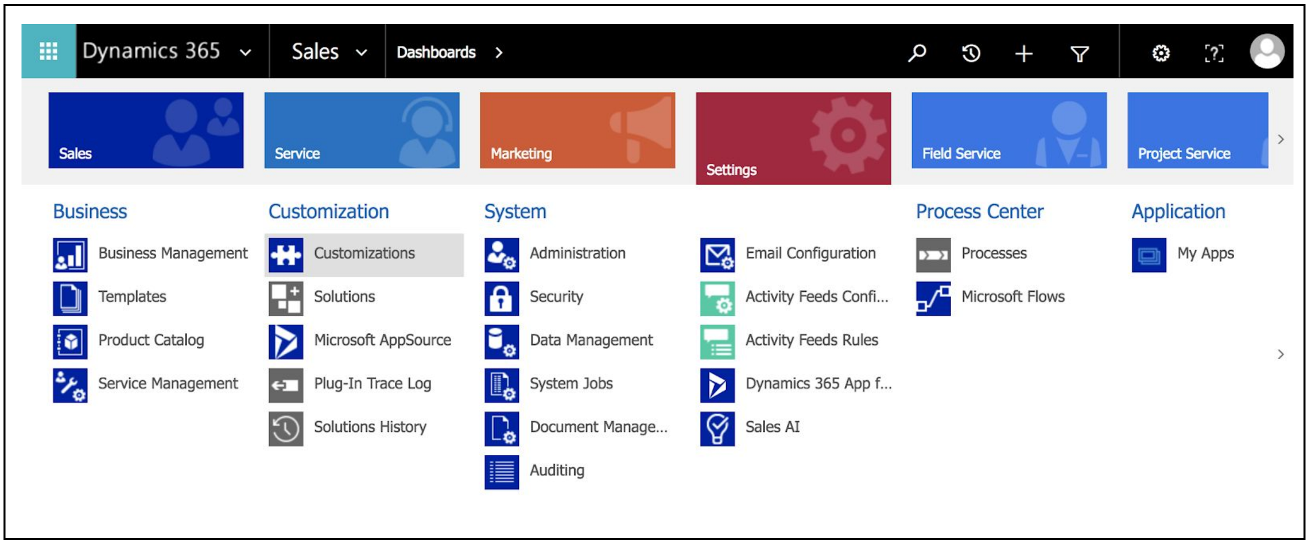
2. You will need the following information, then click on "Save":
    a. Description = <YOUR_KEY_NAME>
        i. Example: [CRM Widget]
    b. Expires = Never
        i. Select this value.
    c. Click on "Add".

3. Copy the **Value** (this is the **Client Secret**) that it auto-generates, you will need this later in the setup:

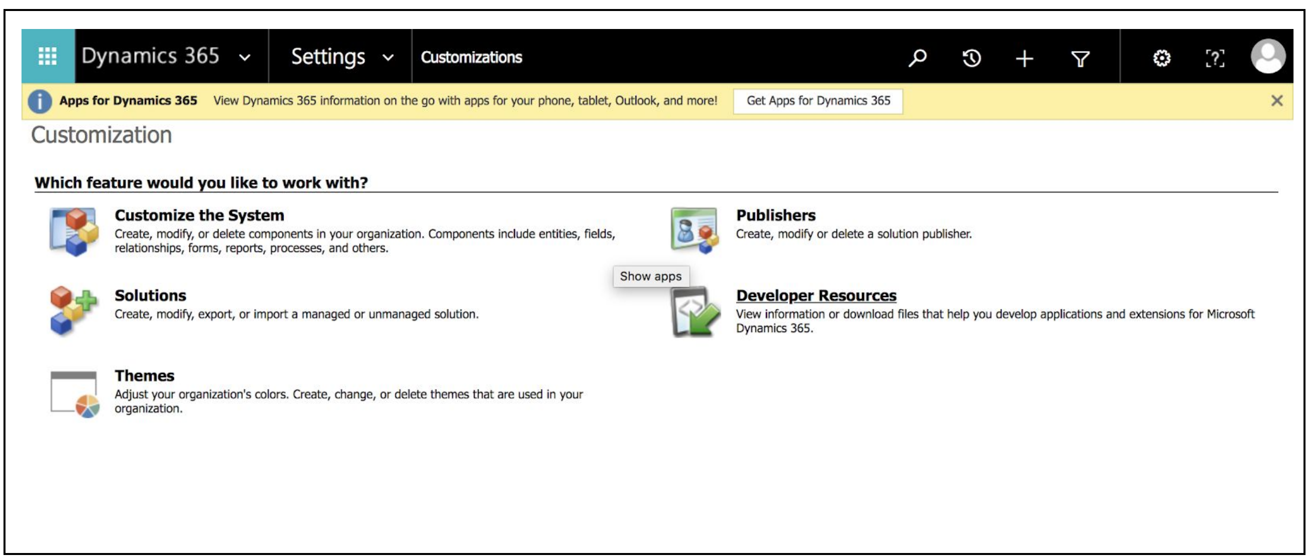


Microsoft CRM Dynamics

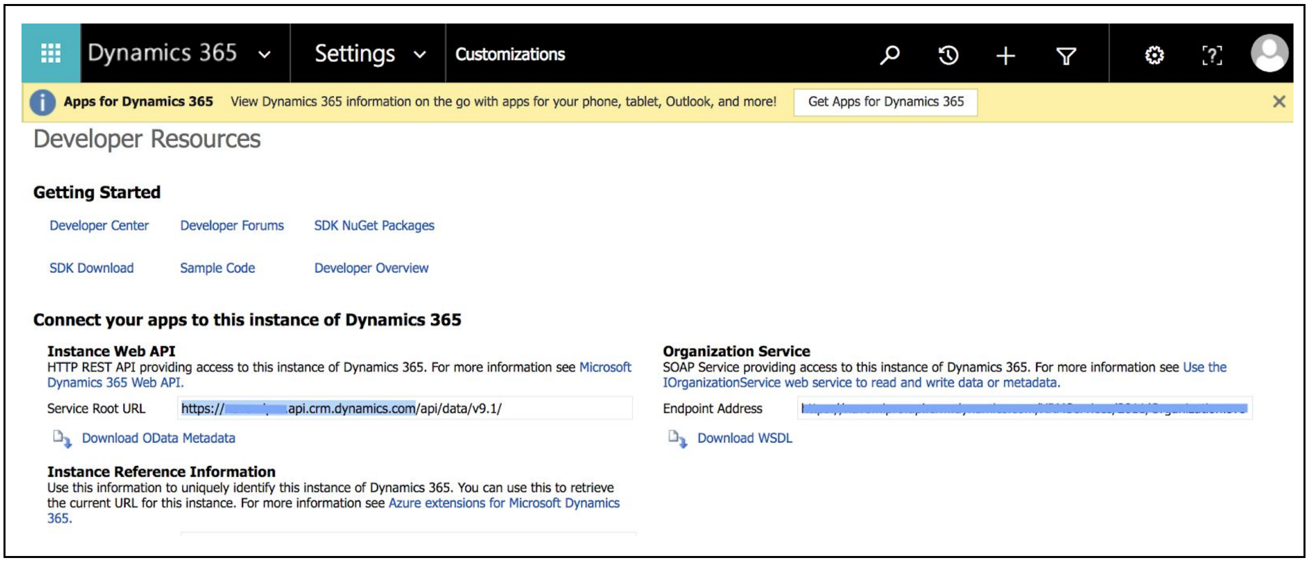
1. Login to your Microsoft CRM Dynamics as an admin anc click on Settings → Customizations on top menu:



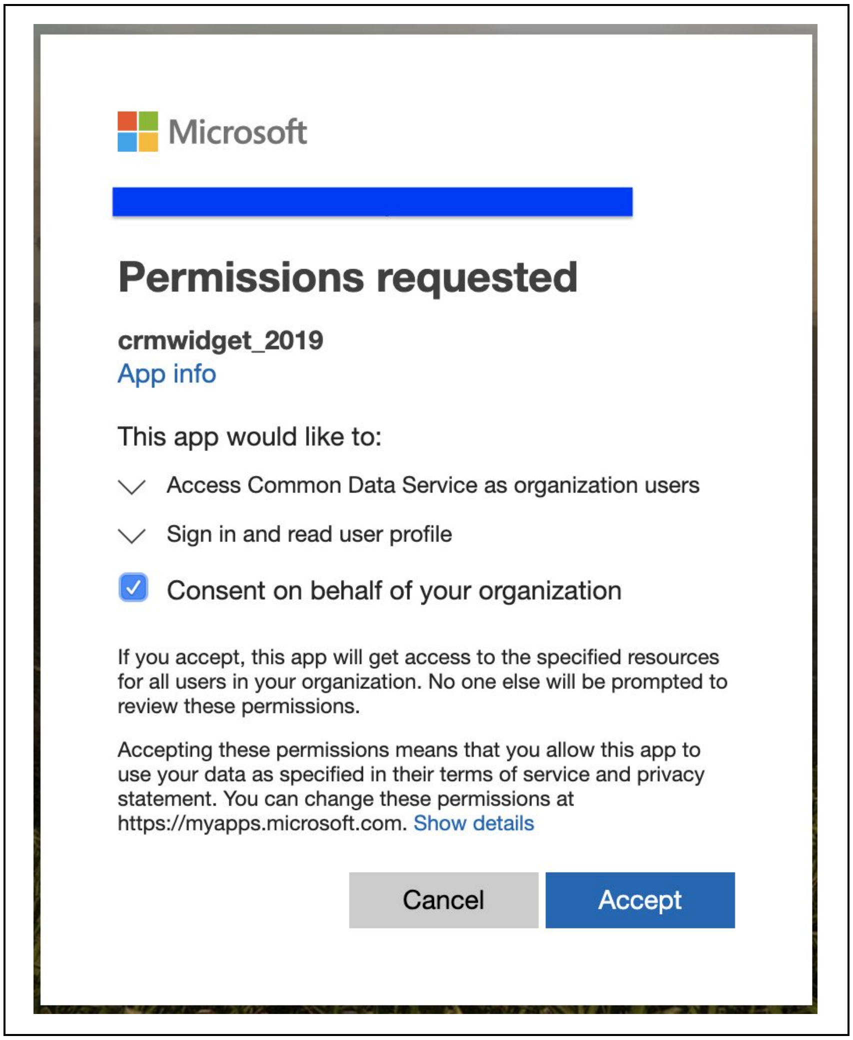
2. Click on "Developer Resources":



3. Under the Instance Reference Information, copy the value within the field called Service Root URL. This value will be needed in the CRM Widget setup:



After the configuration is done in the Admin-Panel and in the LE, when trying to access the LE after the CRM credentials have been entered, a request similar to this may appear:



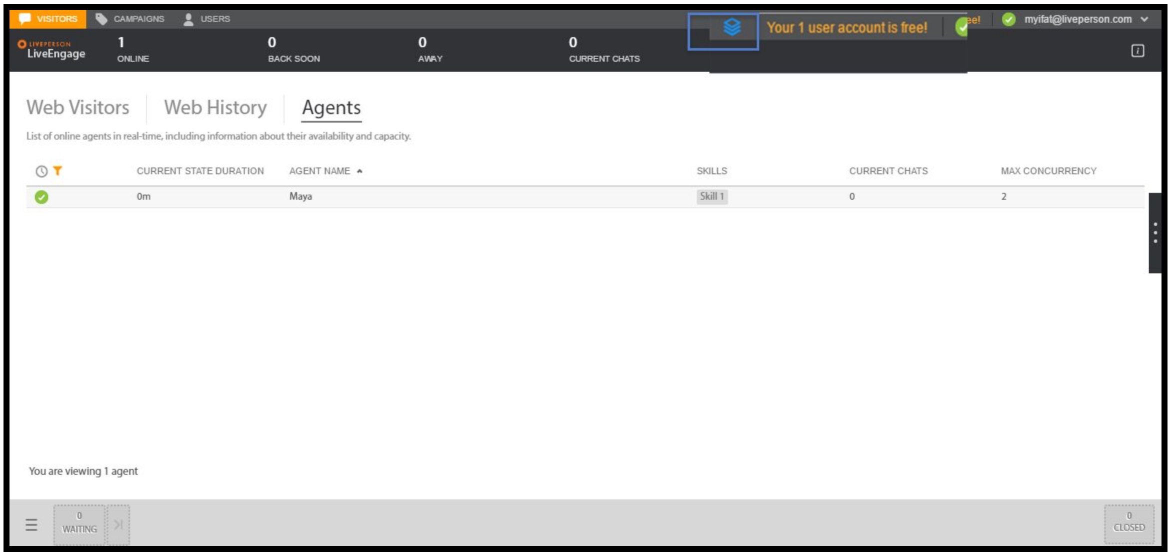
Just Consent and Accept!

Adding Widget in LiveEngage Console

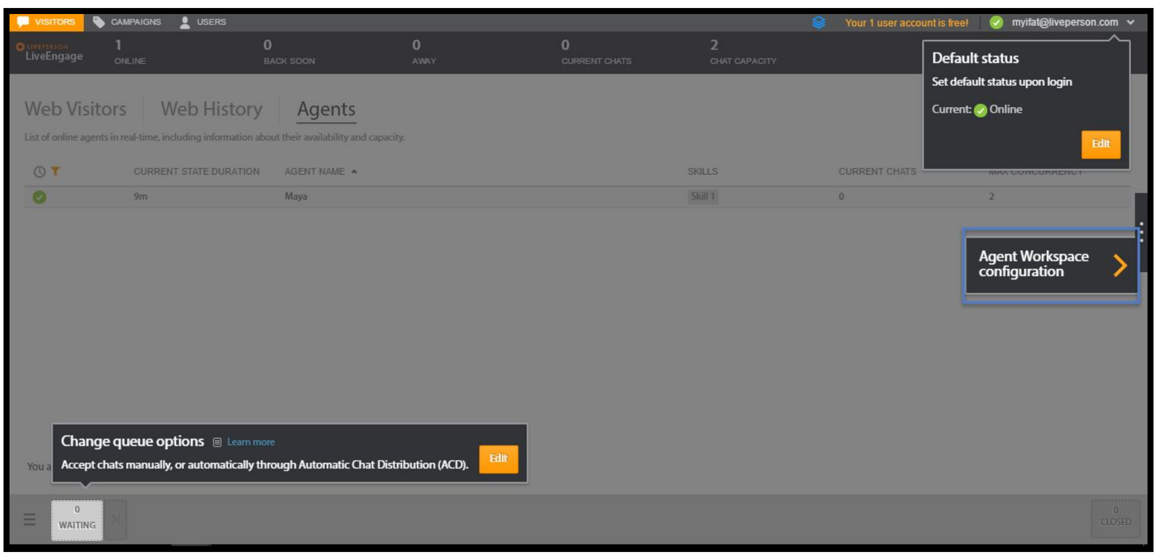
Now that you've updated the CRM Widget profile and license information, it is time to go to LiveEngage and configure the widget.

Note! Your LiveEngage user must be defined as an Administrator to configure the widget.

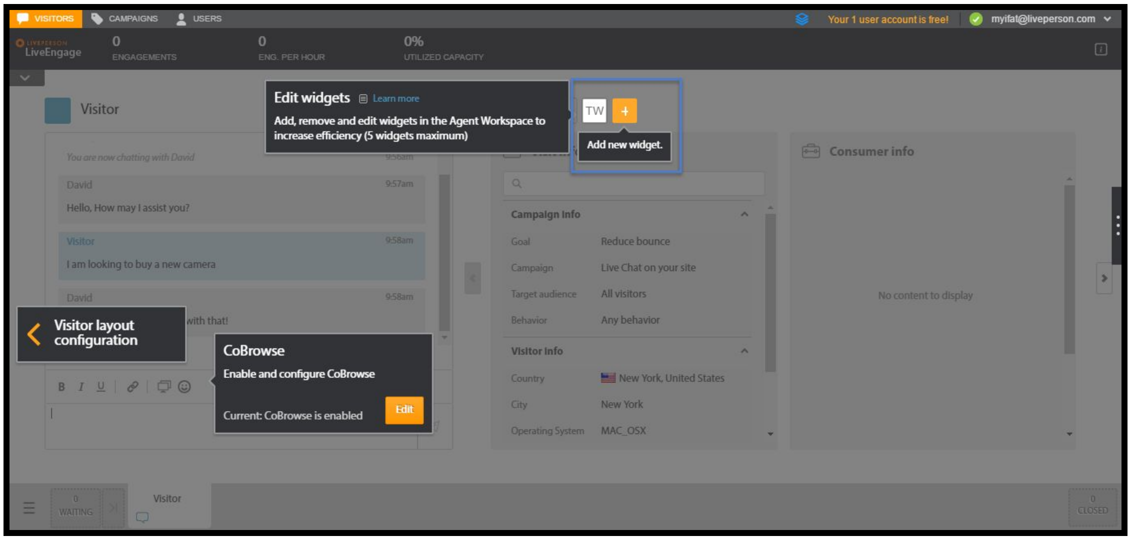
1. Access "Night Vision" settings menu: click on the icon on the top right of your screen as shown in the screenshot below:



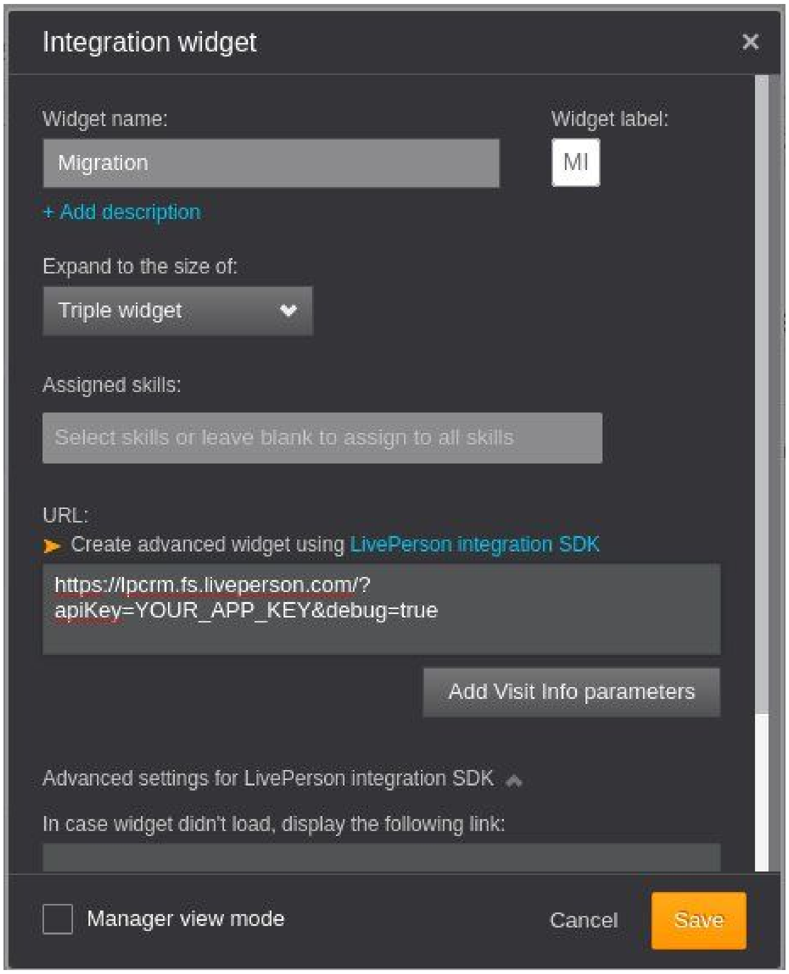
2. Once in Night Vision, click on “Agent Workspace Configuration”:



3. Click on “+” icon to add a new widget. If you have used up 5 widgets, please contact your LivePerson Account Manager.



4. Choose the name for the Widget (you can use “MS Dynamics” to have “MD” as the widget label)
5. Choose “Double Widget” or “Triple Widget”



6. Enter the following URL
    - https://lpcrm.fs.liveperson.com/?apiKey=YOUR_APP_KEY&debug=true, this is found in Configuring the CRM in the Widget Admin Panel section, LE Widget Info subsection.
7. Click on "Add Visit Info parameters" and add this mapping:
    - visitorName = Visitor Name. Then click "+". Then click "Save Parameters"
8. Click "Save"

Features and Capabilities***

In this session are listed the features and capabilities that the CRM Widget has for integration with Microsoft Dynamics.

*** Features not listed here are subject to discussed for custom development.

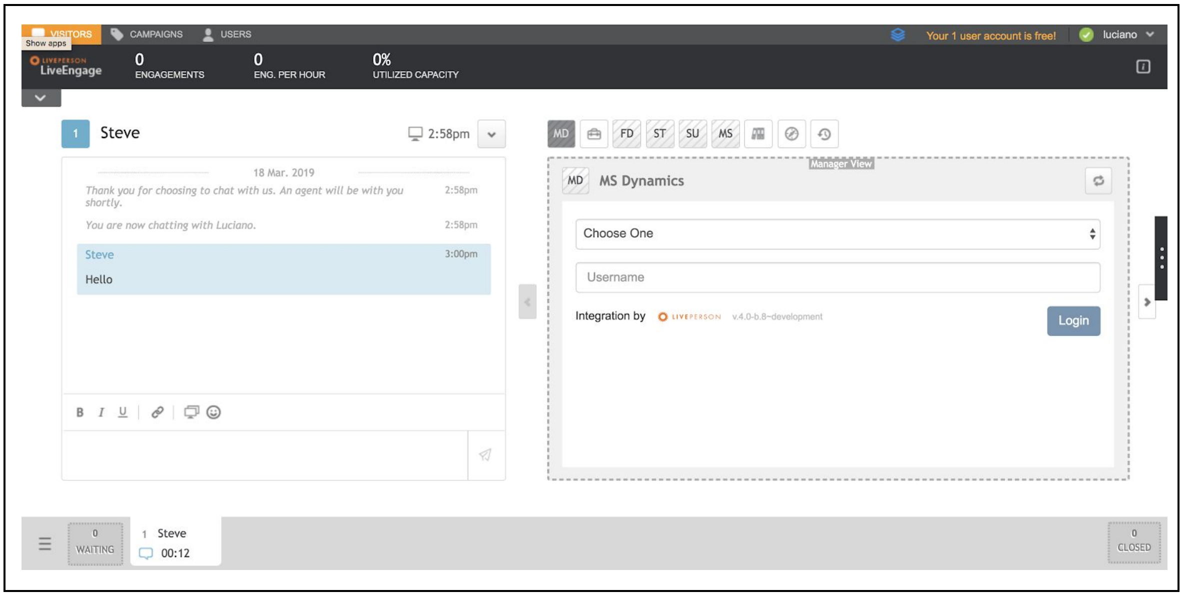
Overview

Below is an overview of the widget capabilities, in this section, we will cover the following topics:

- Starting MS Dynamics Widget
- Login Widget
- Custom Functionalities
- Search Records
- Search Records Filter / Fields
- View Records
- View Transcript Associated with Records
- Create New Records
    - Create Account
    - Create Lead
    - Create Contact
    - Create Case
- Linking a Chat Transcript to Entity
- Unlink Chat Transcripts

Starting MS Dynamics Widget

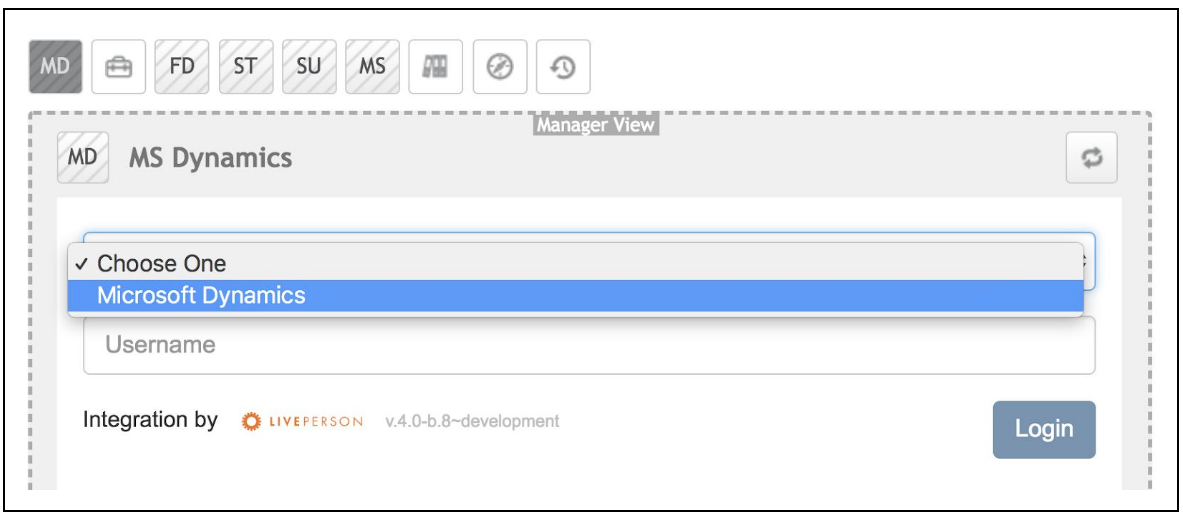
To start working on the new widget, accept a chat, click on "MS Dynamics" widget, login and you can view Contacts and Leads and create Accounts, Leads, Contacts and Cases directly in LiveEngage.



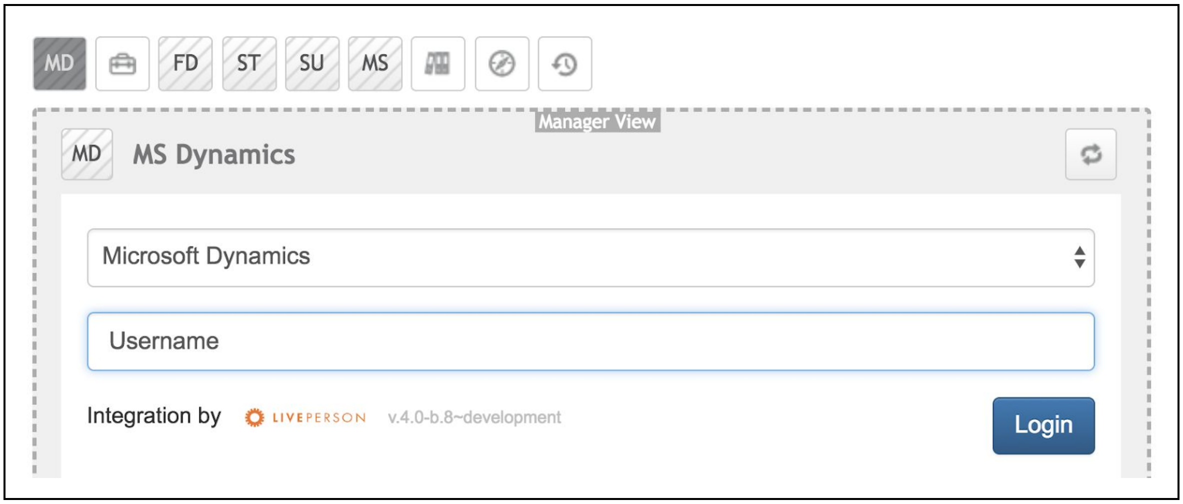
Login Widget

To be able to access the Widget functionalities, you must insert valid credentials to the registered CRM:

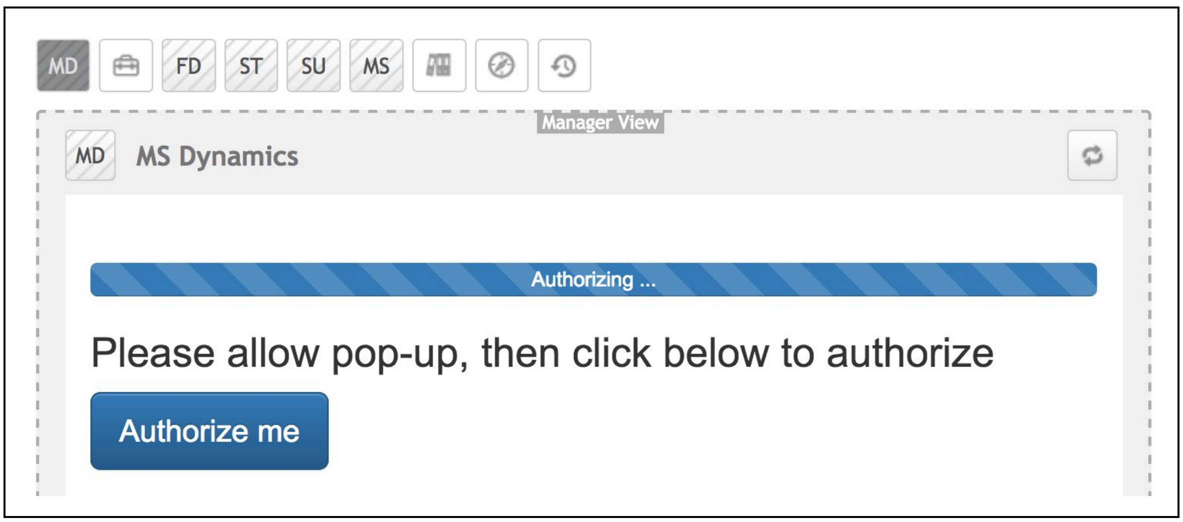
Select registered CRM:



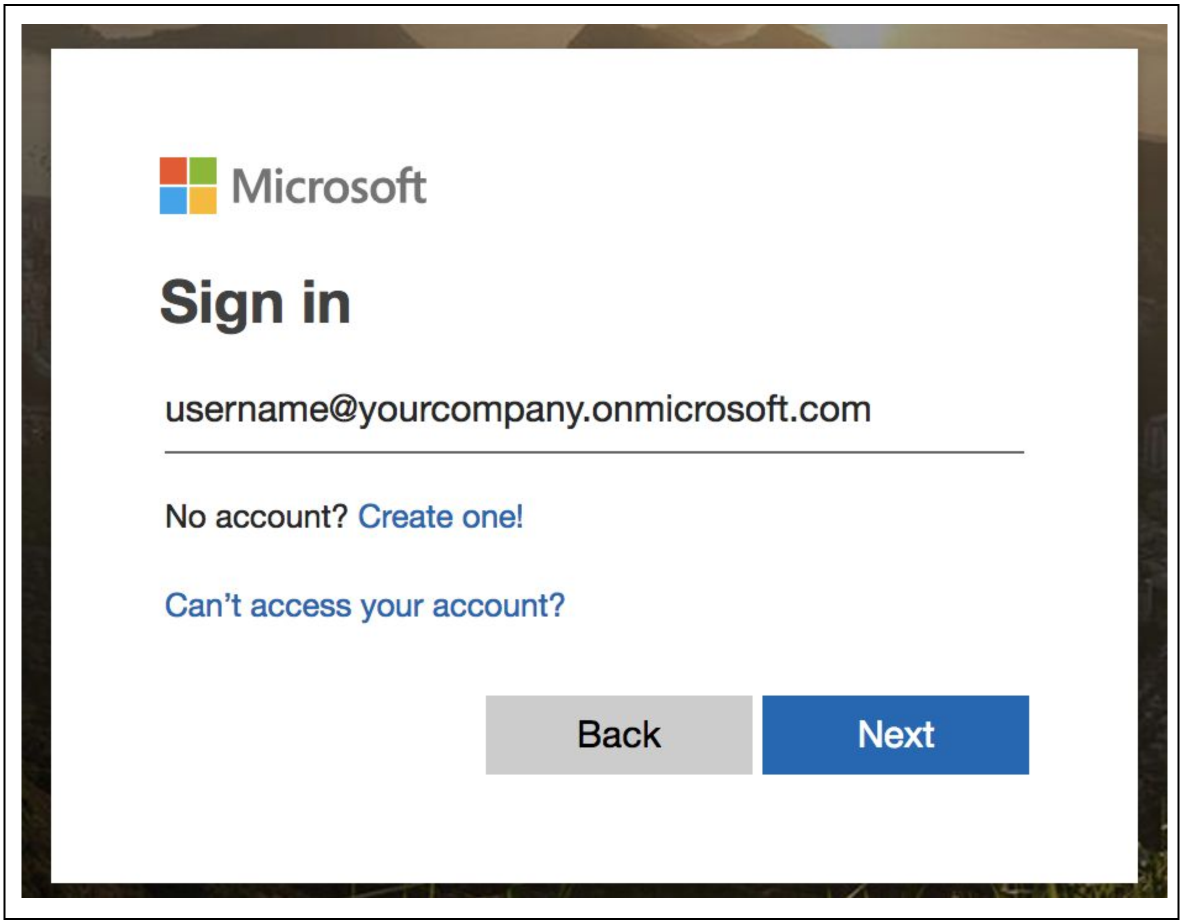
Enter your credentials (Username and Password) and click on "Login" button:



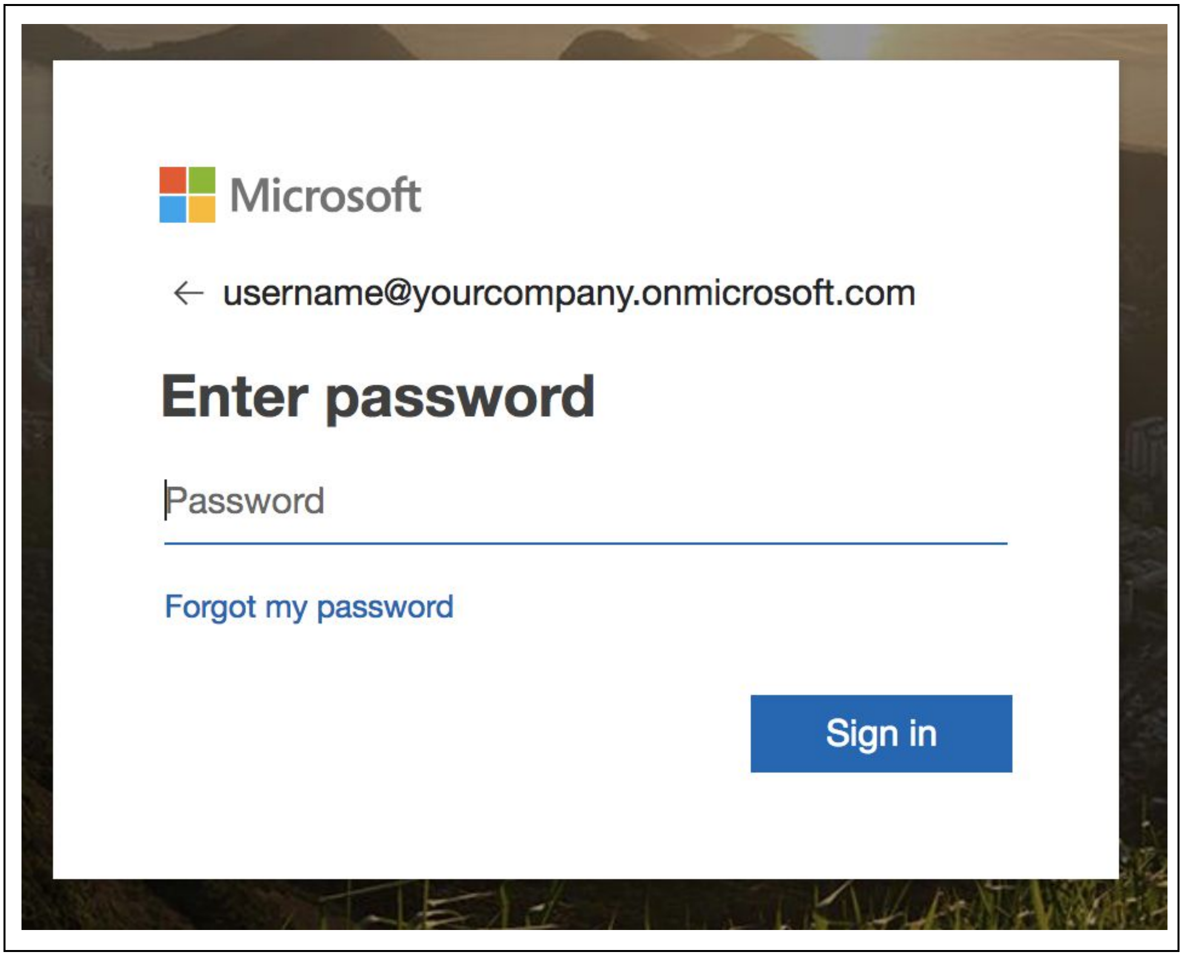
Click on "Authorize me" button:



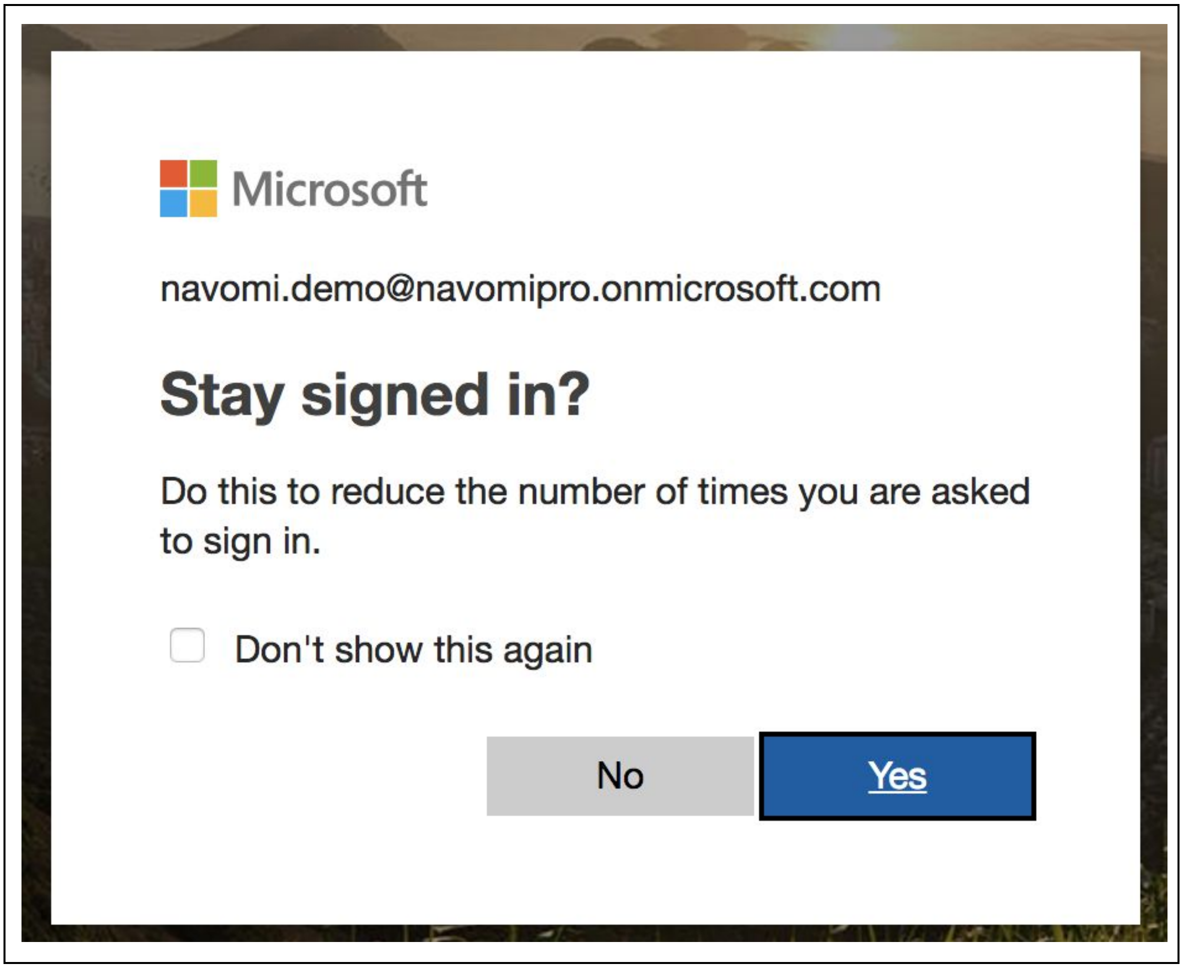
A new window will open for the CRM login. Be sure to enter valid credentials in the requested fields. Insert your MS Dynamics username and click on "Next" button:



Now insert your MS Dynamics password and click on "Next" button:



Sometimes this window will open if your credentials are right. Click on "No" or "Yes" to make your choice:



After this, you will be redirected to a page with the CRM login return messages. Click on "Close" or wait for it to close automatically after 5 seconds

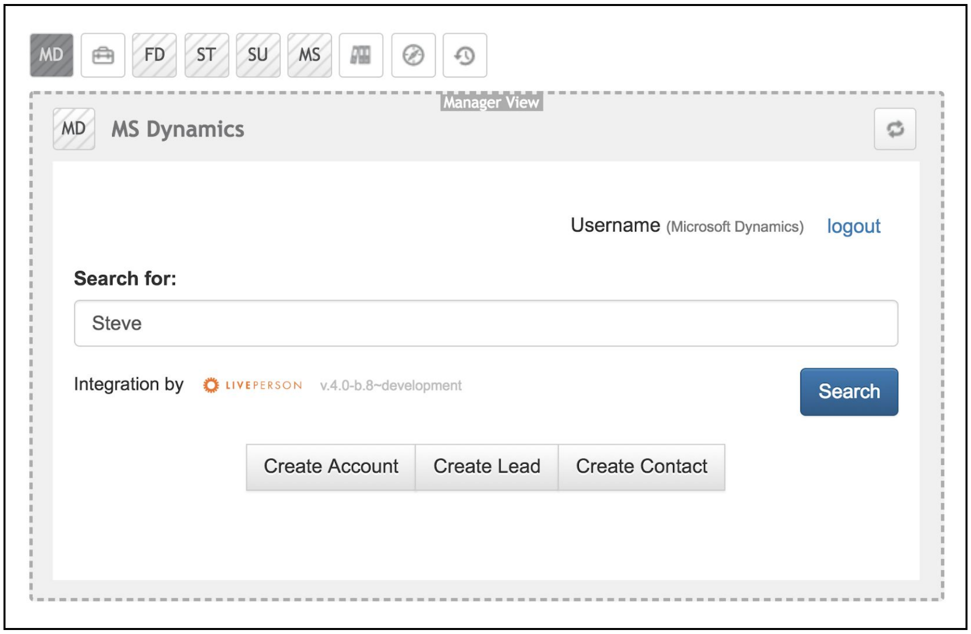
If the message has some type of error, follow these procedures:

- Try to access your CRM instance directly with the same credentials used to make sure they are valid

- Check the Admin Panel settings following this guide
- Check the key settings in CRM following this guide

Note! Make sure there are no blank spaces in the values entered in the settings.

Then the chosen CRM data will be loaded into the widget:



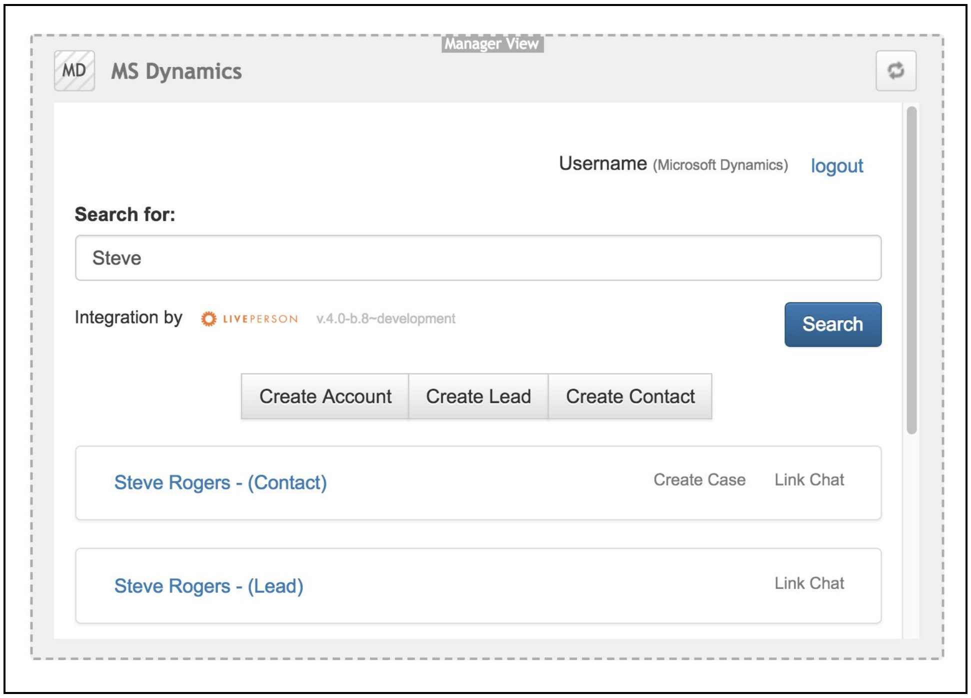
Custom Functionalities

Features not listed here are subject to discussed for custom development.

Search Records

The search bar in the Widget enables you to search for any matching contents in following standard MS Dynamics objects:

- Contacts Object
- Leads Object



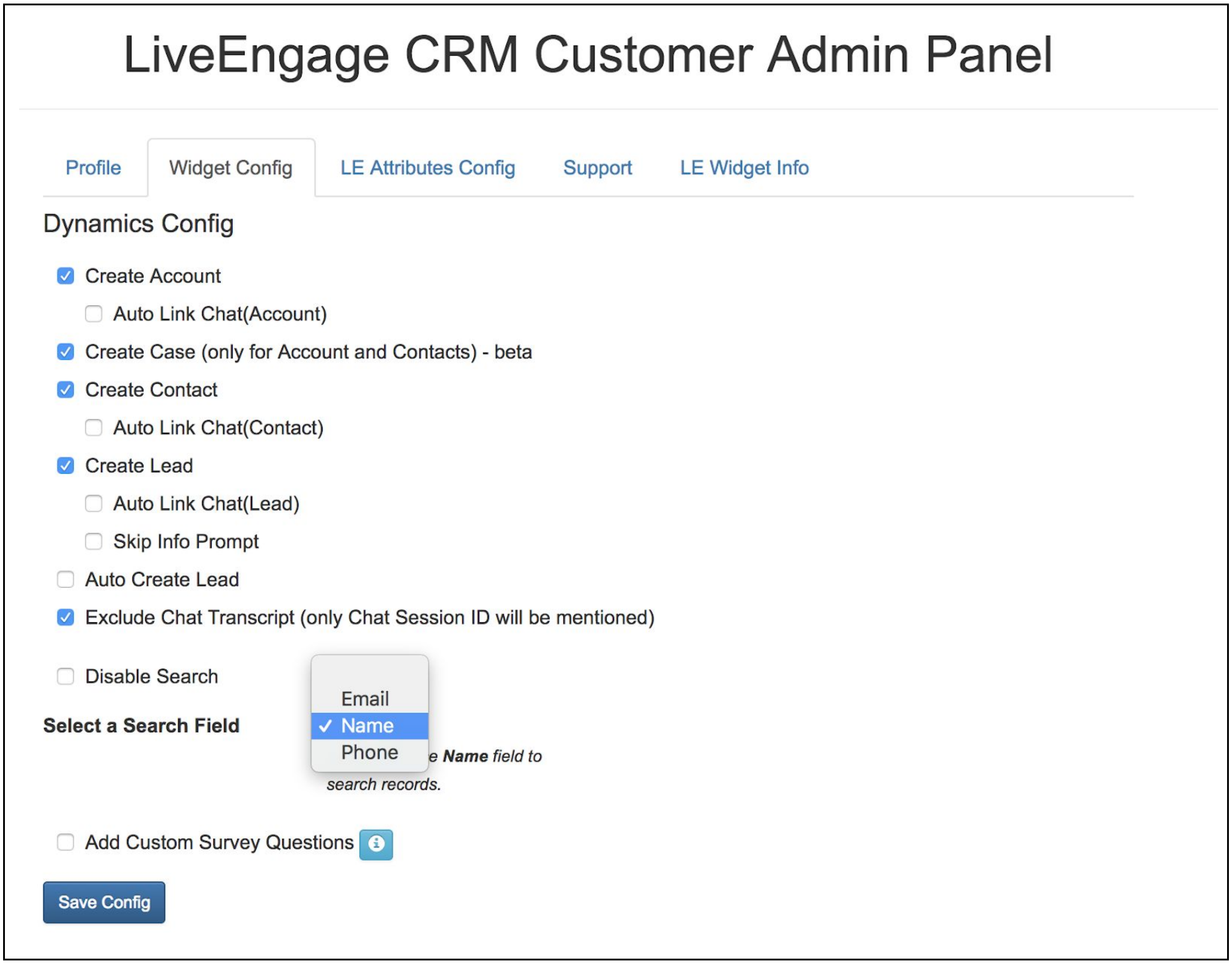
Note! If you have a visitor name in your pre-chat survey, the visitor name value will be automatically populated in the search string and the search will be performed once you click on the widget icon.

Search Records Filter/Fields

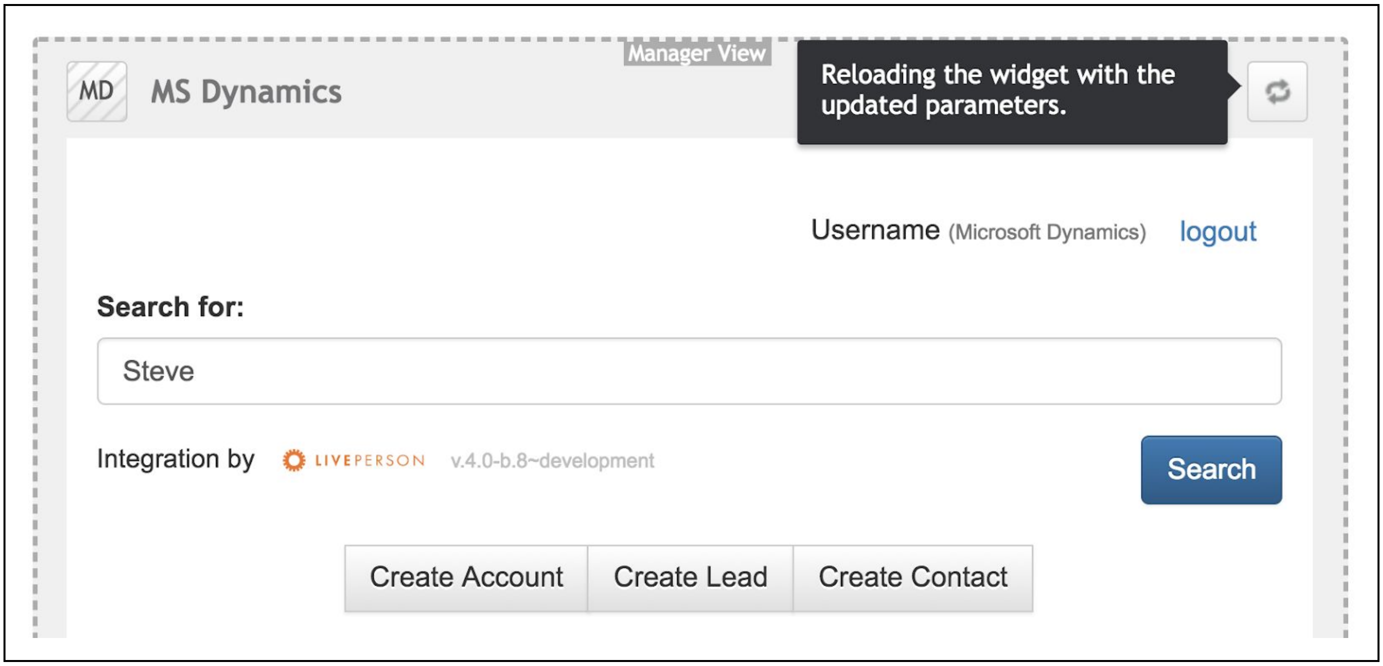
For MS Dynamics there are options to filter searches by:

- Name
- Email
- Phone

The widget's search Settings can be changed in the Admin Panel. To do this, login in Admin Panel, click on tab "Widget Config" and select the drop down "Select a Search Field". Choose one option and click on "Save Config" to update the configuration.

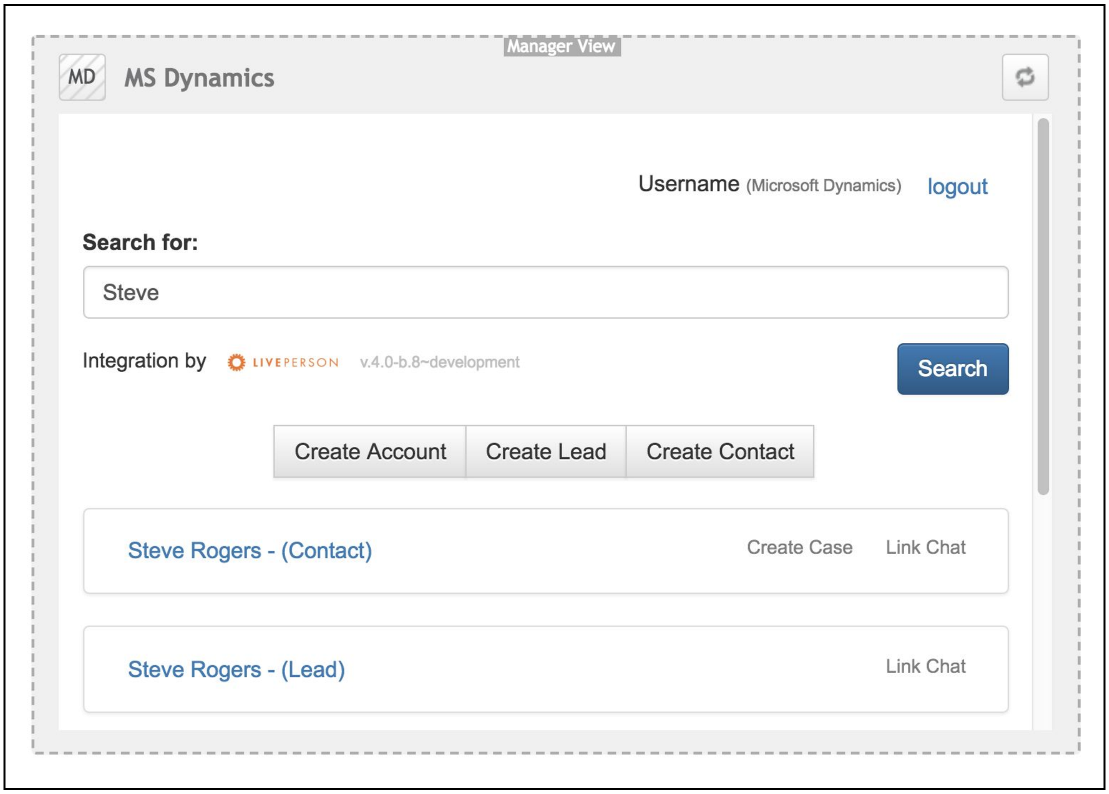


For new settings to take effect, you need to reload the widget in Live Engage. To do this, just click on the icon at the top of the widget on the right:

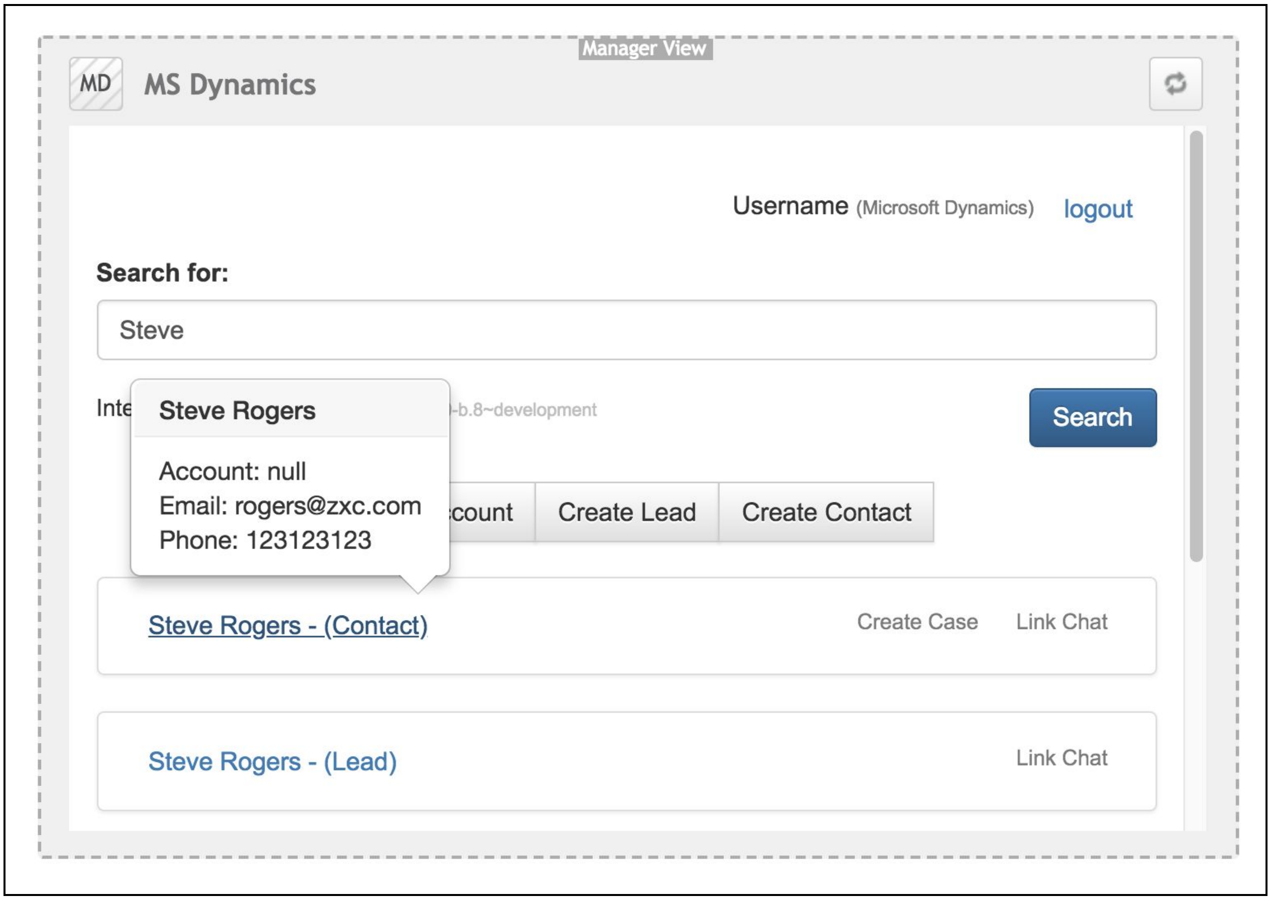


View Records

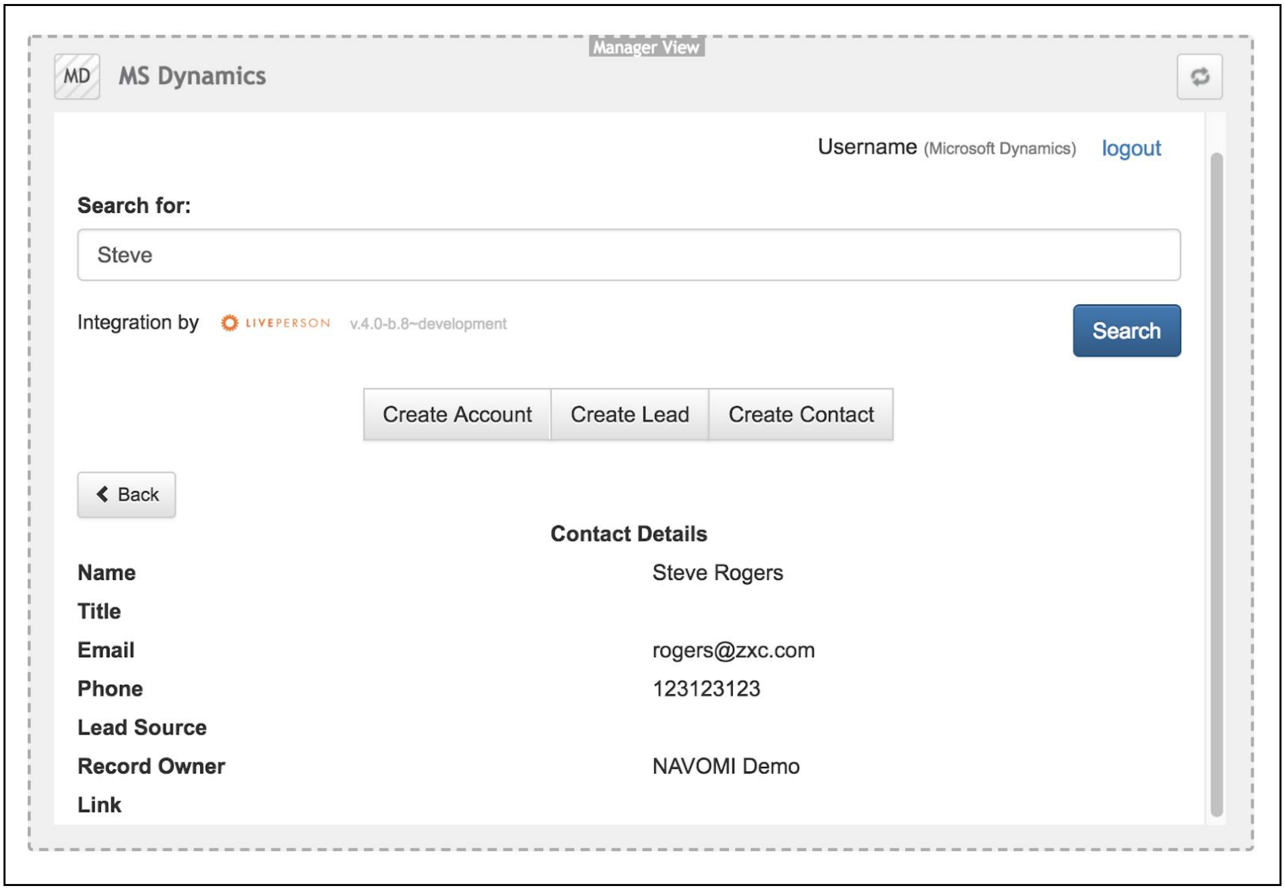
Here is a sample listing of search records. In this case, the search is configured with the filter by NAME, and all data that has the search field value as part of the data are listed. Beside the value of each data, in parentheses one can observe the type (CONTACT and LEAD).



Hovering over resulting search records will popup min-details window showing additional information about the record:



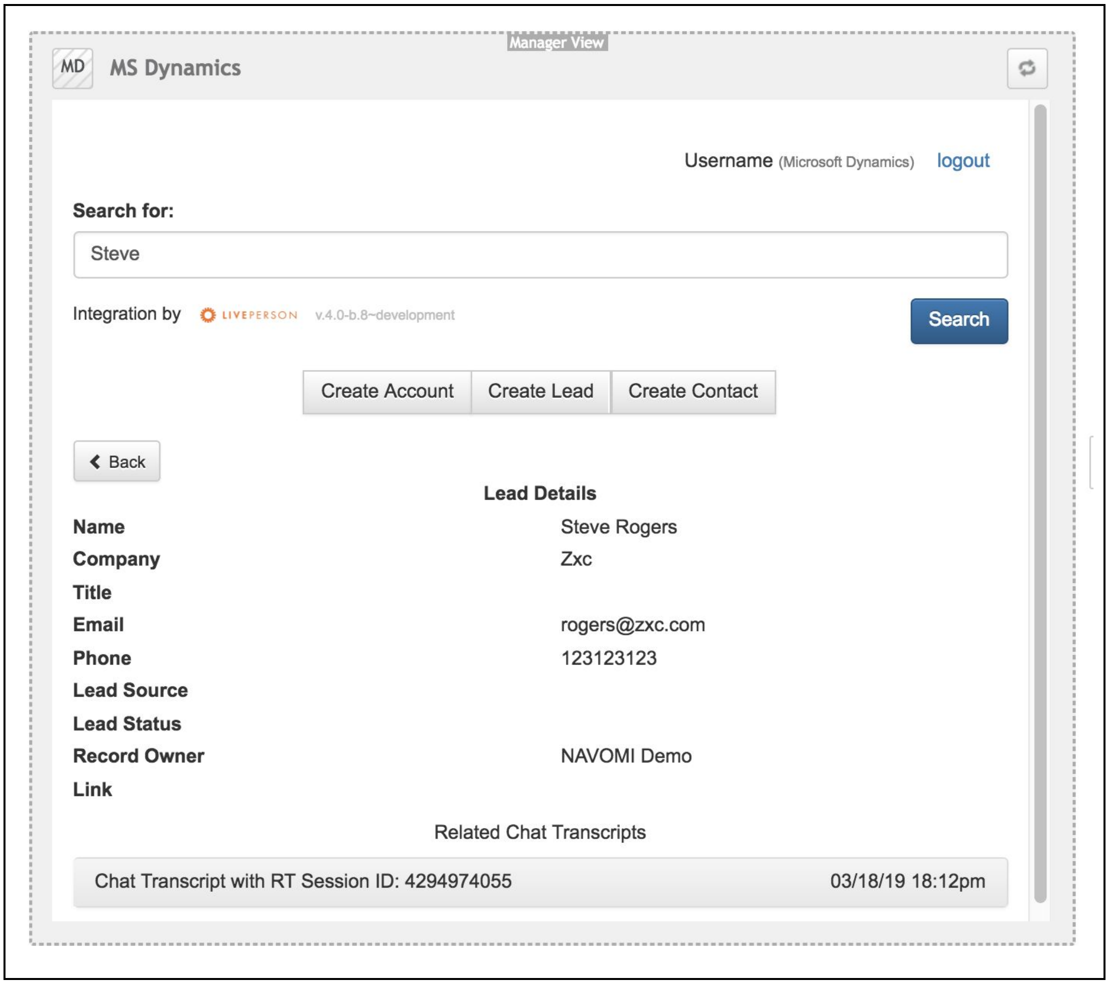
Clicking will display the item details. Here is an example of CONTACT:



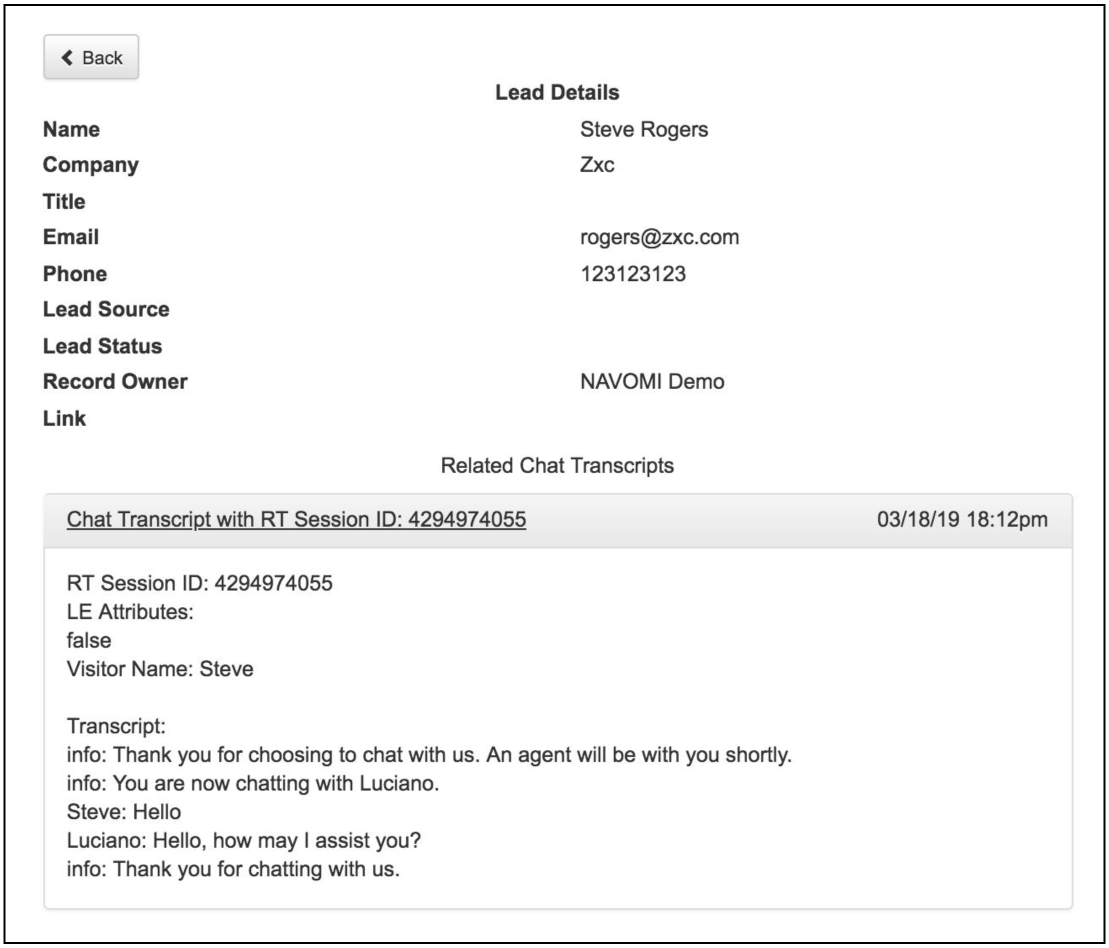
View Transcript Associated With Records

To view chat history, click on the link of the record. It will expand out and showing the information in the top section.

- The bottom section will show all previous chat transcripts entries.

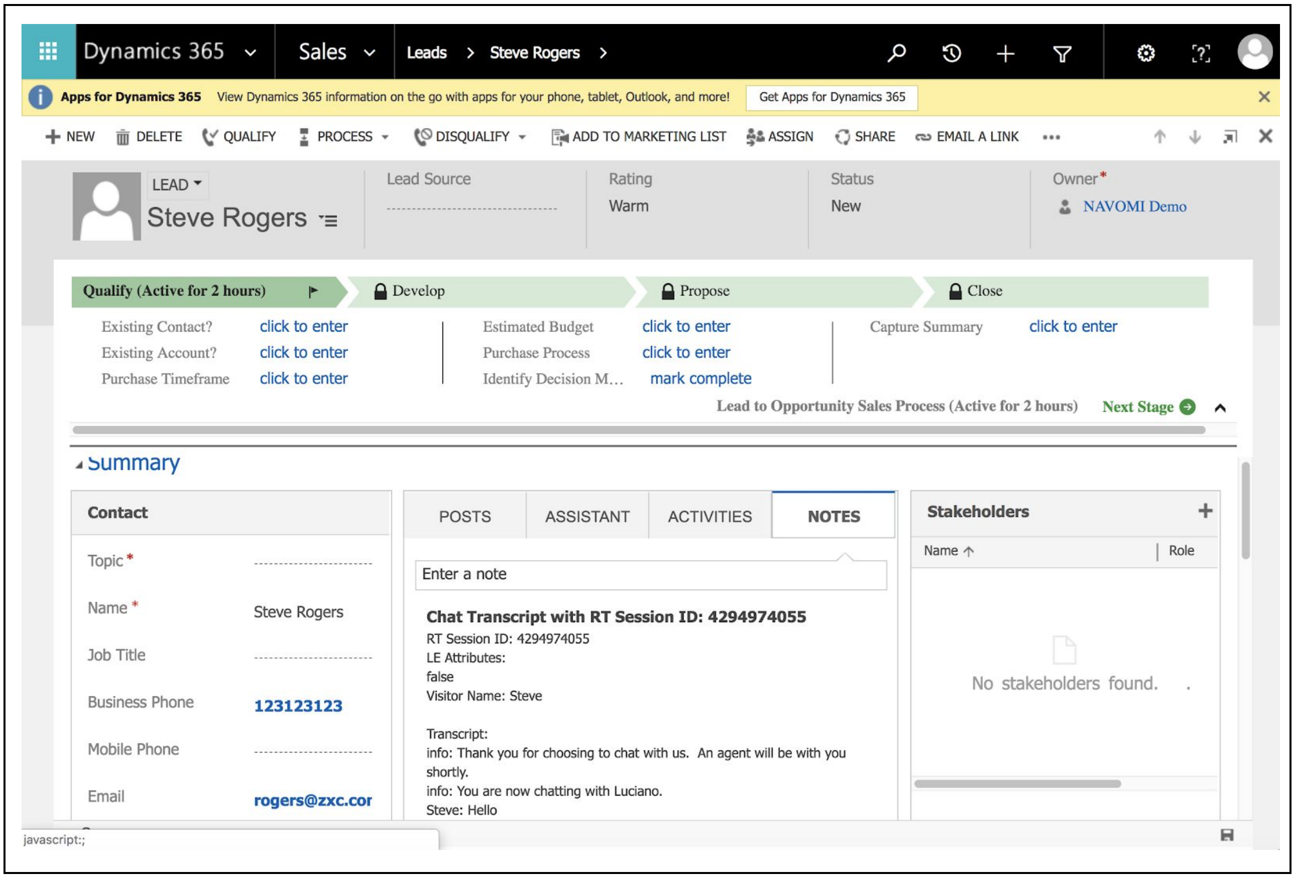


- Click on the specific transcript ID to see the full details of the chat transcripts as show in the screen below:



Note where this record will be stored in CRM system itself:

To see the Linked chats, go to the Lead / Contact record and click in "Notes" tab:

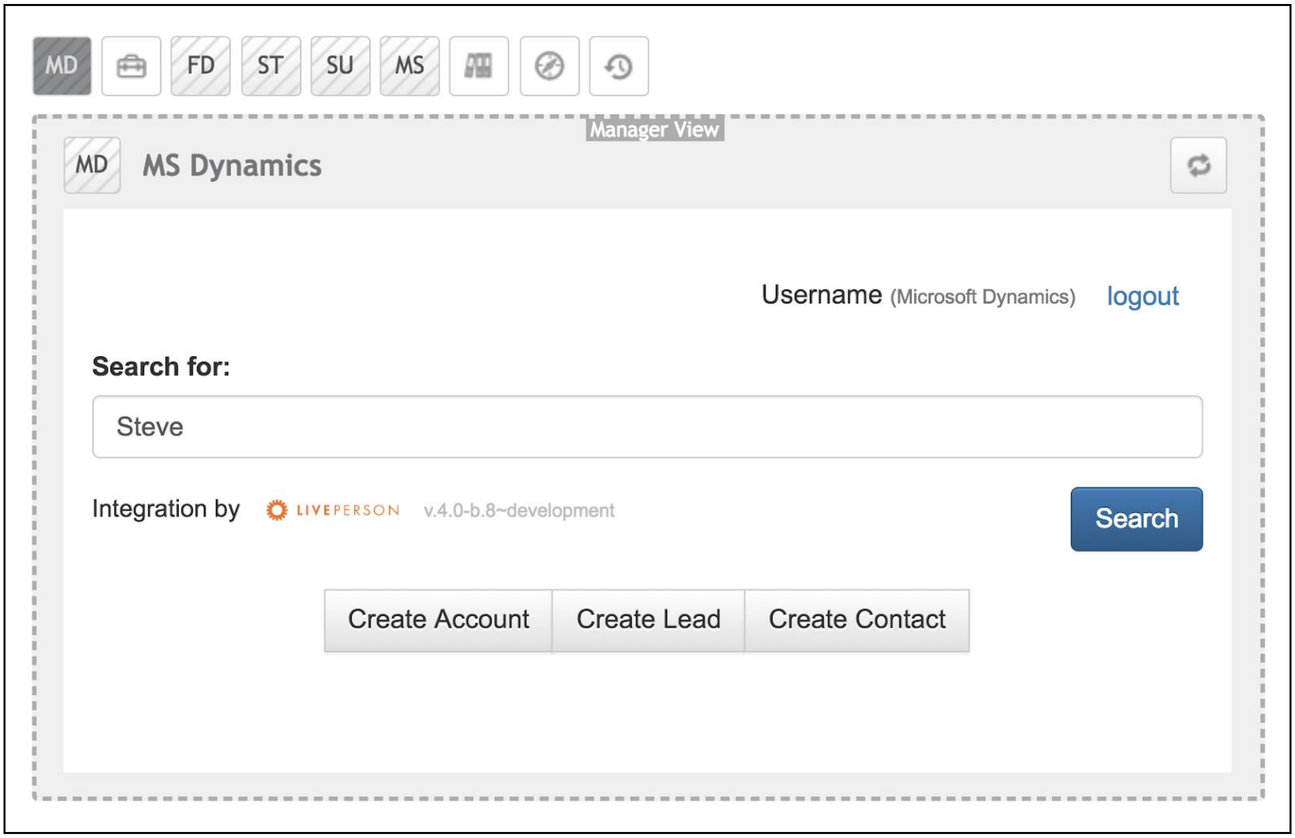


<u>This is Out of Box. Custom storage of Transcript are subject to be discussed</u>

Create New Records

The MS Dynamics provide the following features:

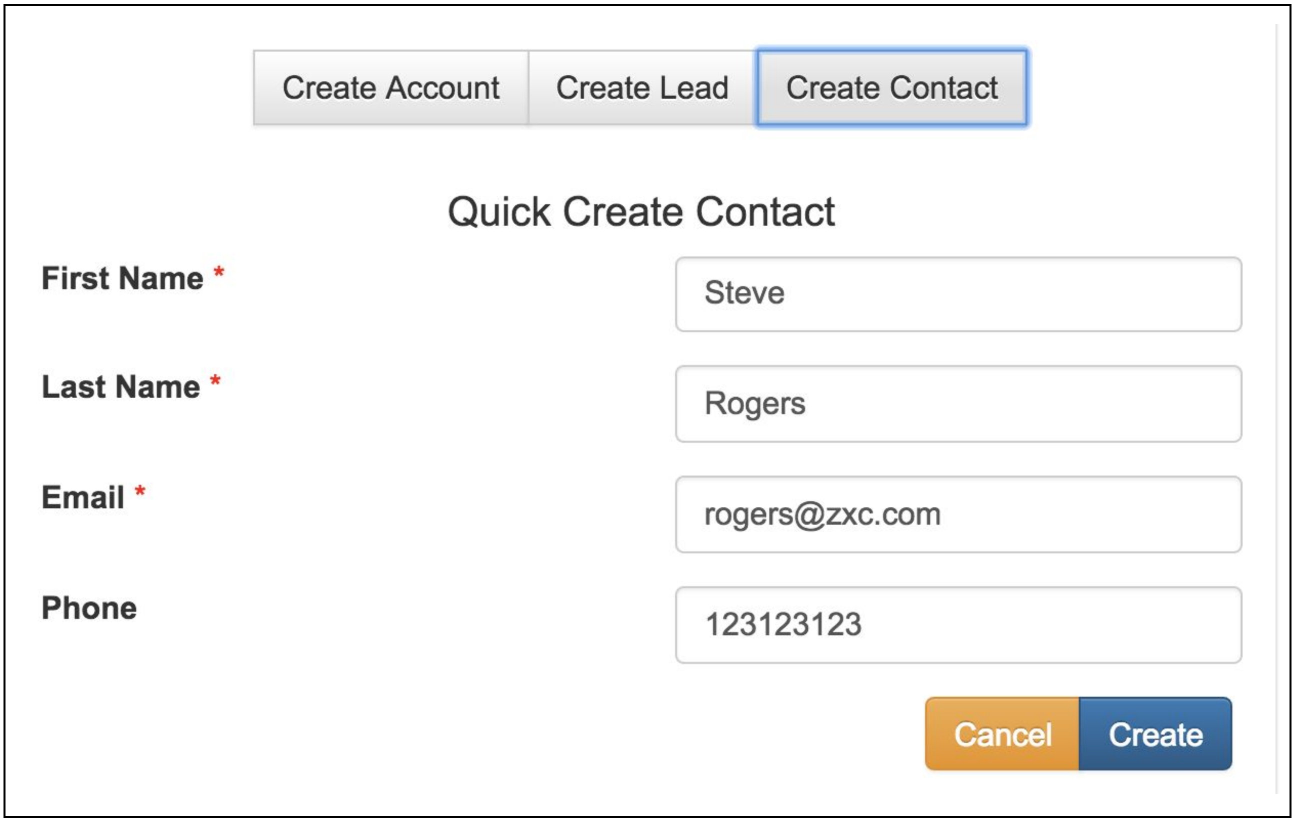
- Create Account
- Create Lead
- Create Contact
- Create Case



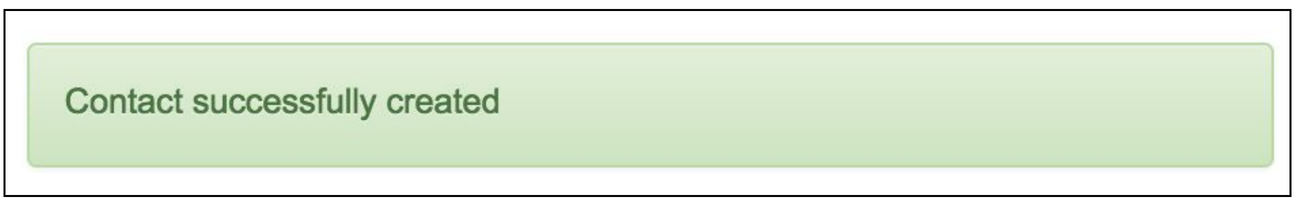
Create Contact

In case you want to create a new “Contact” record, click on the "Create Contact".

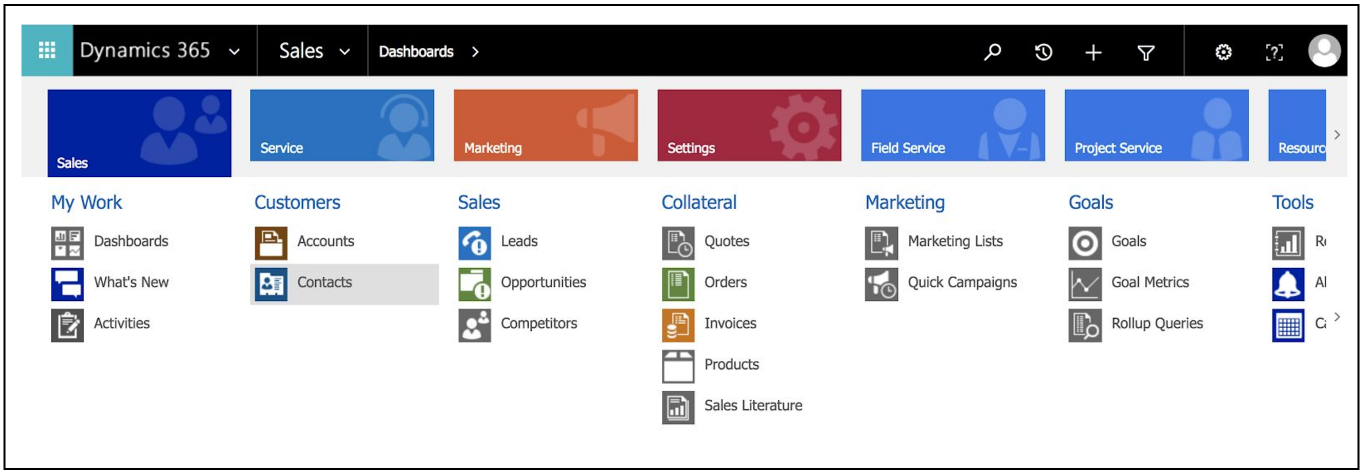
- Fill in all the relevant fields in the form
  - All required fields are denoted with an asterisk (First Name, Last Name, Email, Phone Number).
- Some of these fields will be automatically populated from the answers provided in the pre-chat survey (if pre-chat survey is enabled).
- Click “ Create” to save.



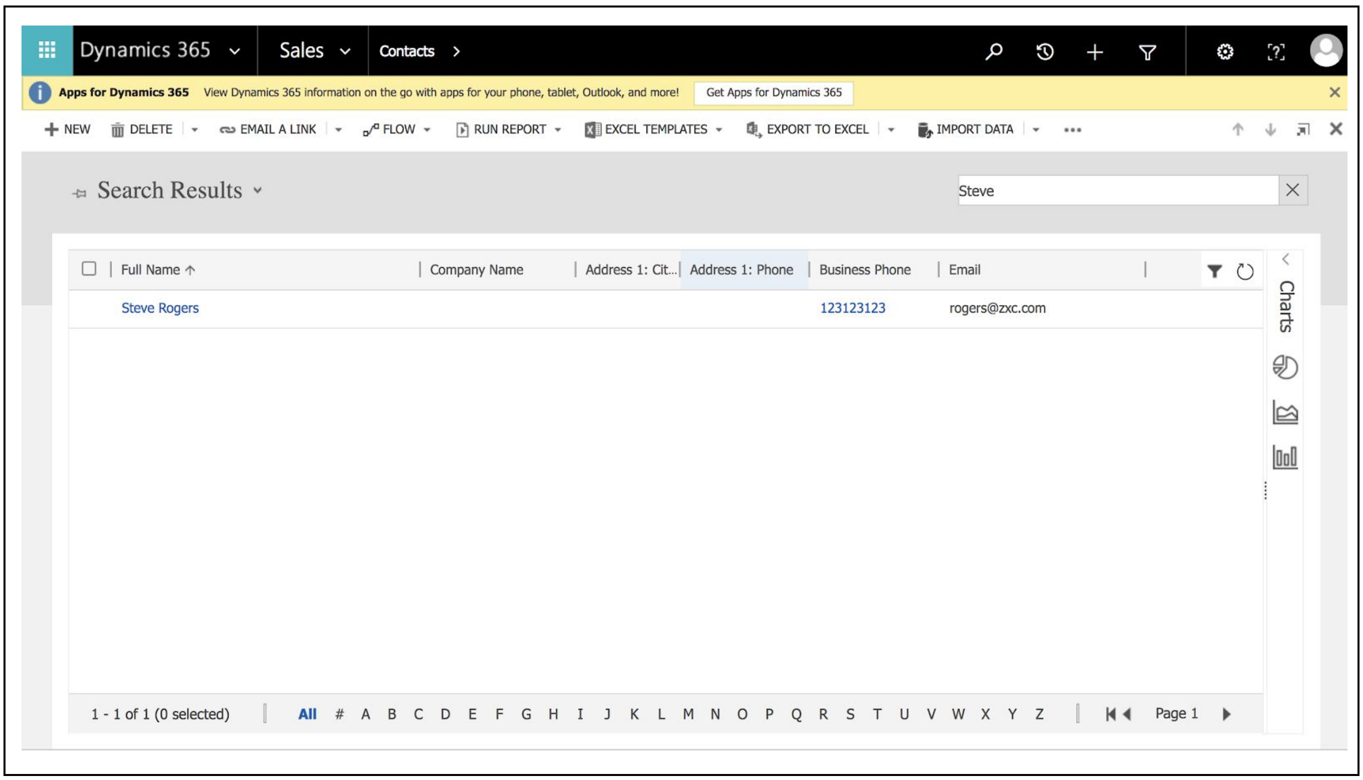
When the record is entered successfully, the message will be displayed:



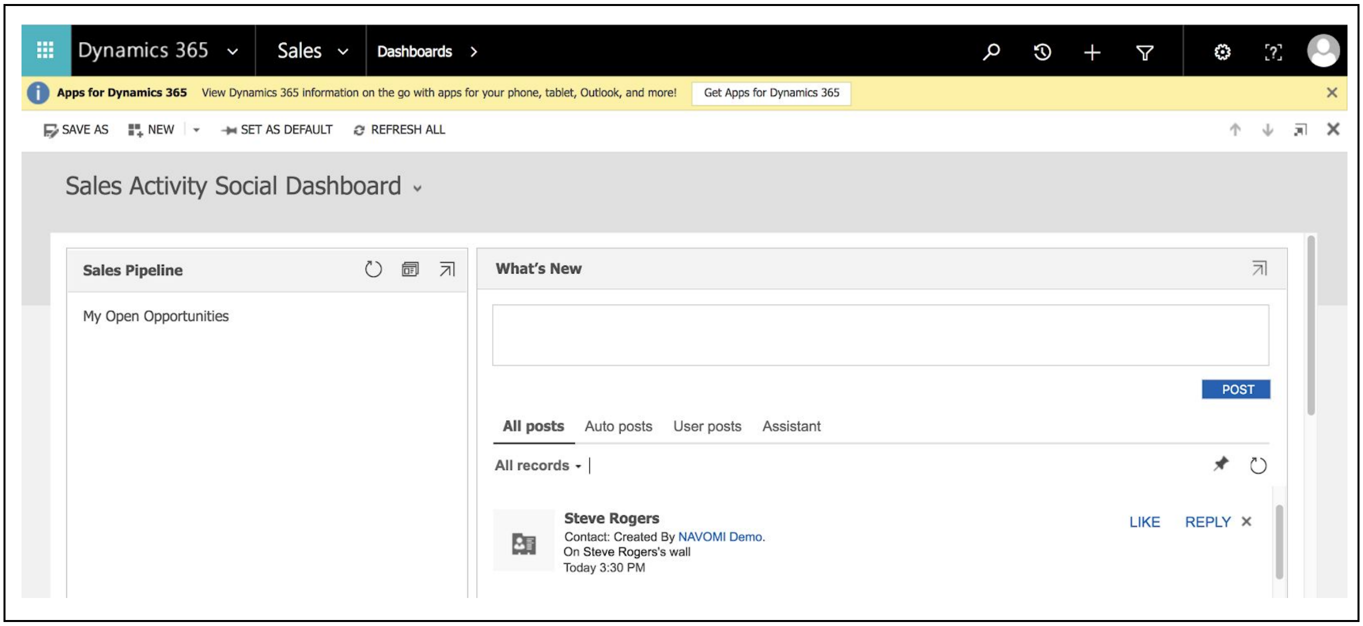
Note where this record will be stored in CRM system itself. Go to Contacts using the top menu:



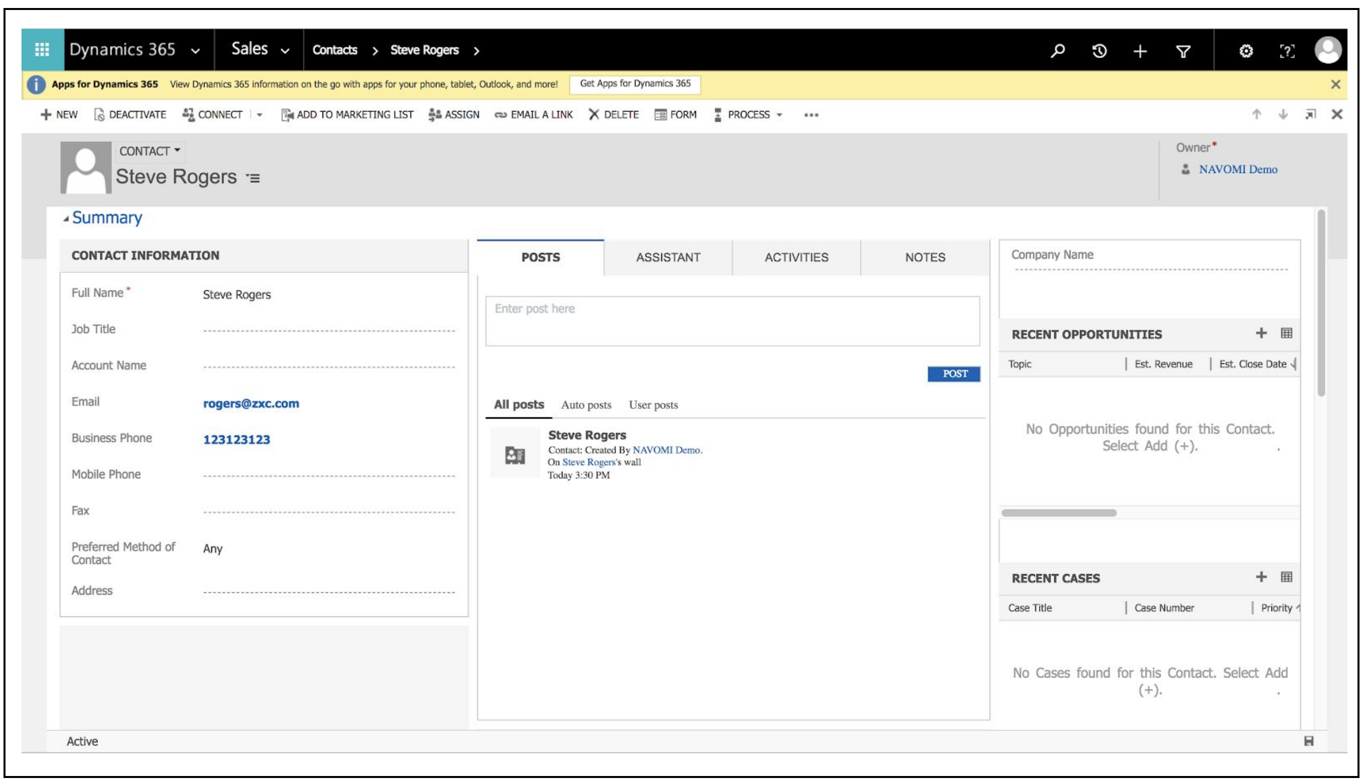
And use the search box at the top to find the record you want and click on it:



Or access directly the last record created in the Dashboard:

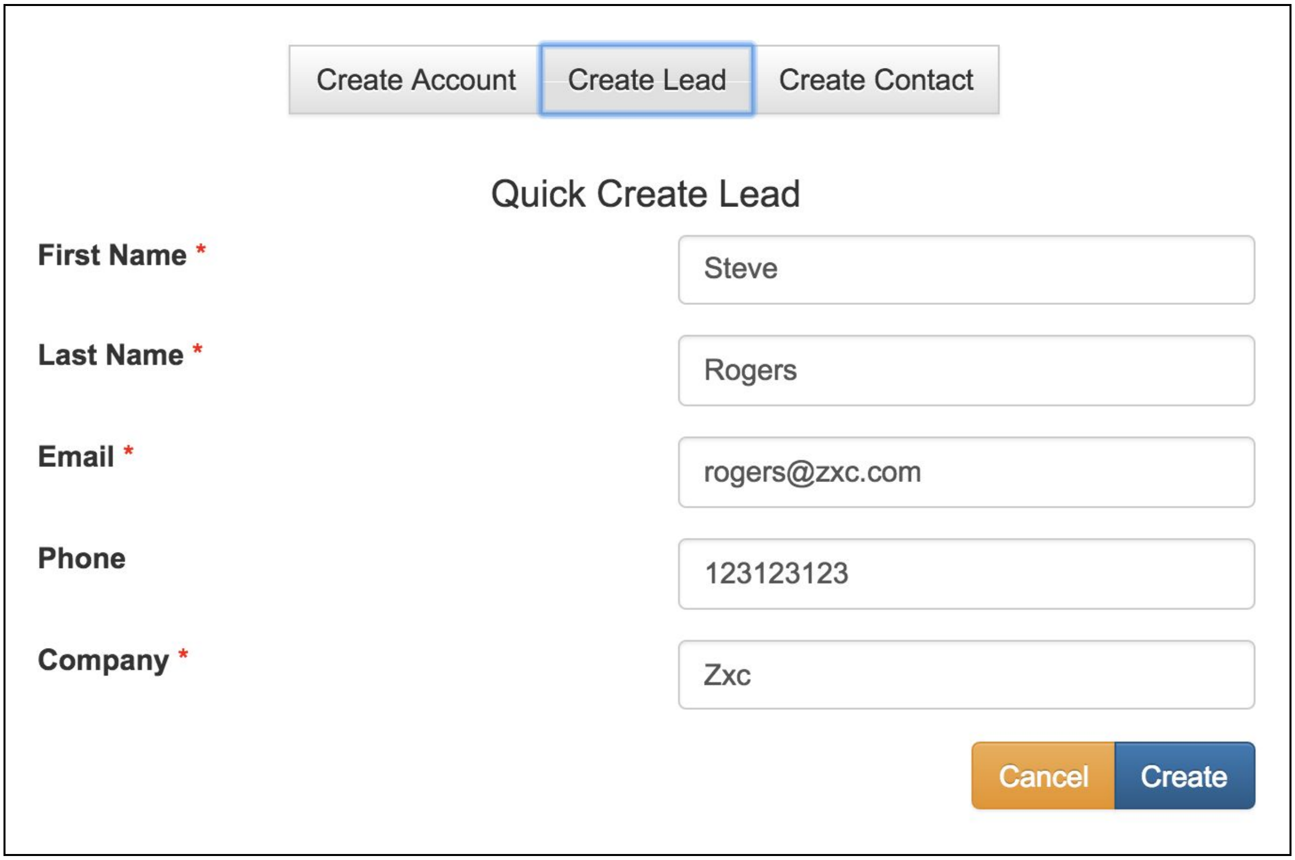


And when you click the last record, the window with the detailed data opens:



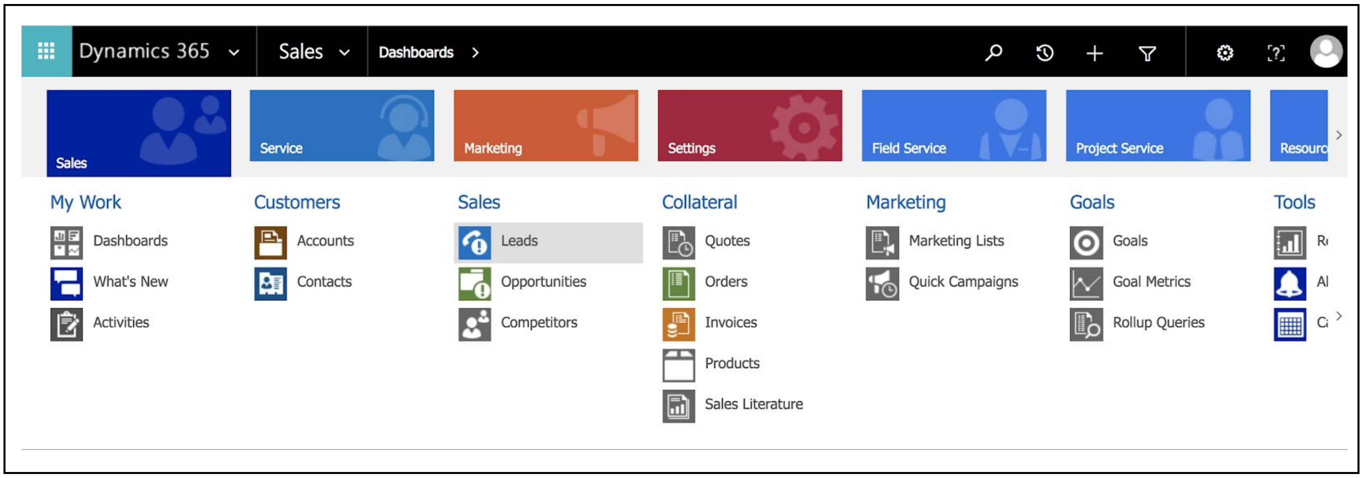
Create Lead

Click on "Create Lead" button and fill out the relevant fields and click on "Create". Some of the field values are automatically copied over from pre-chat survey, if the user fill out one before initiating the Chat.

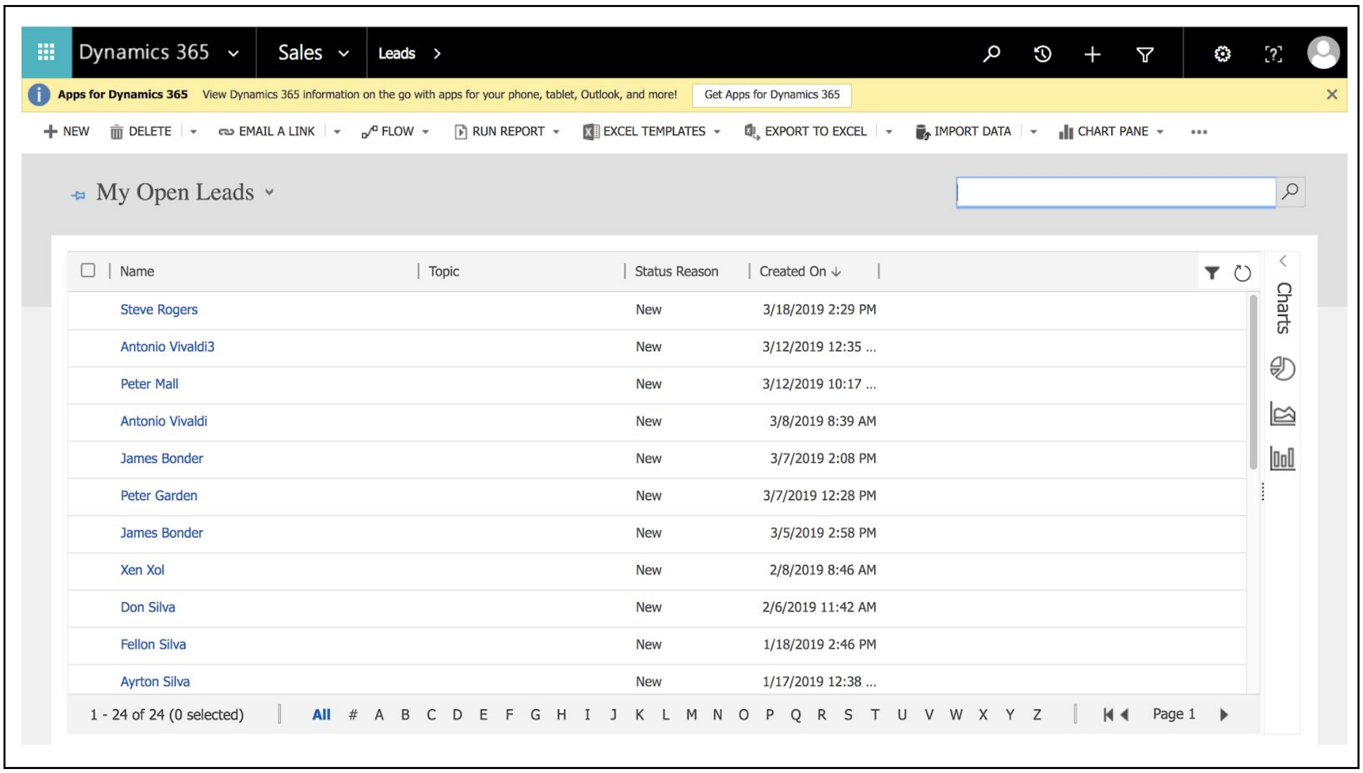


When the record is entered successfully, the message will be displayed:

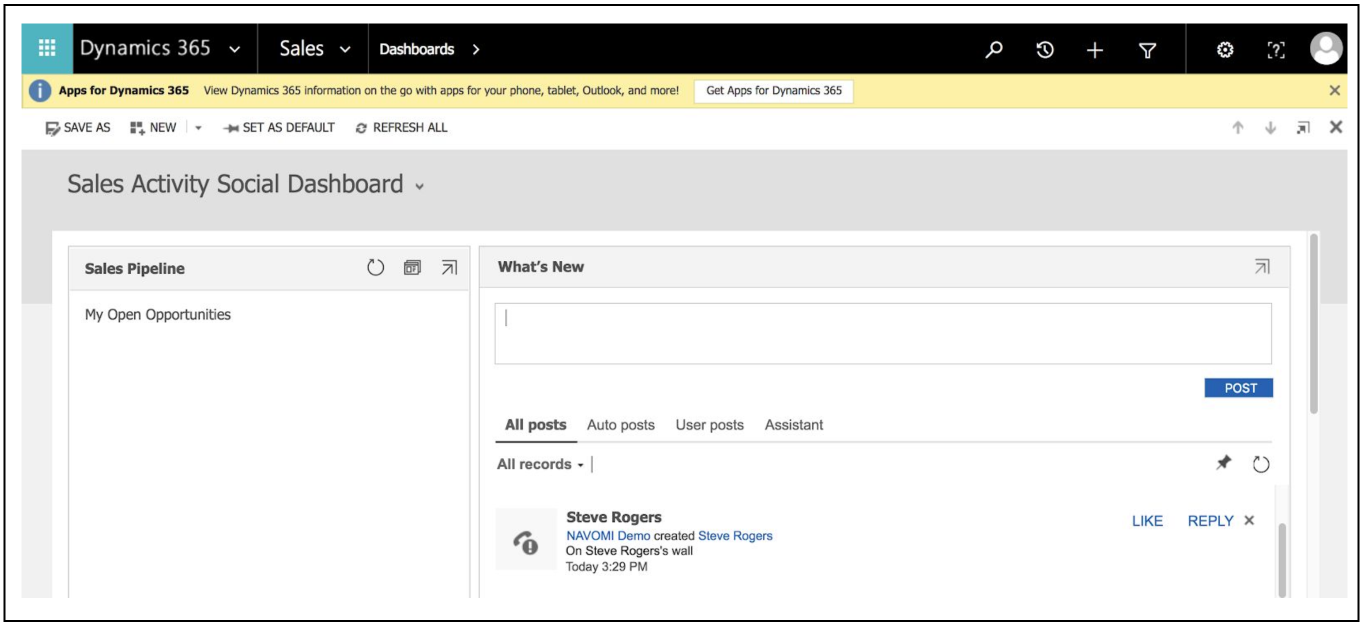
Note where this record will be stored in CRM system itself. Go to Leads using the top menu:



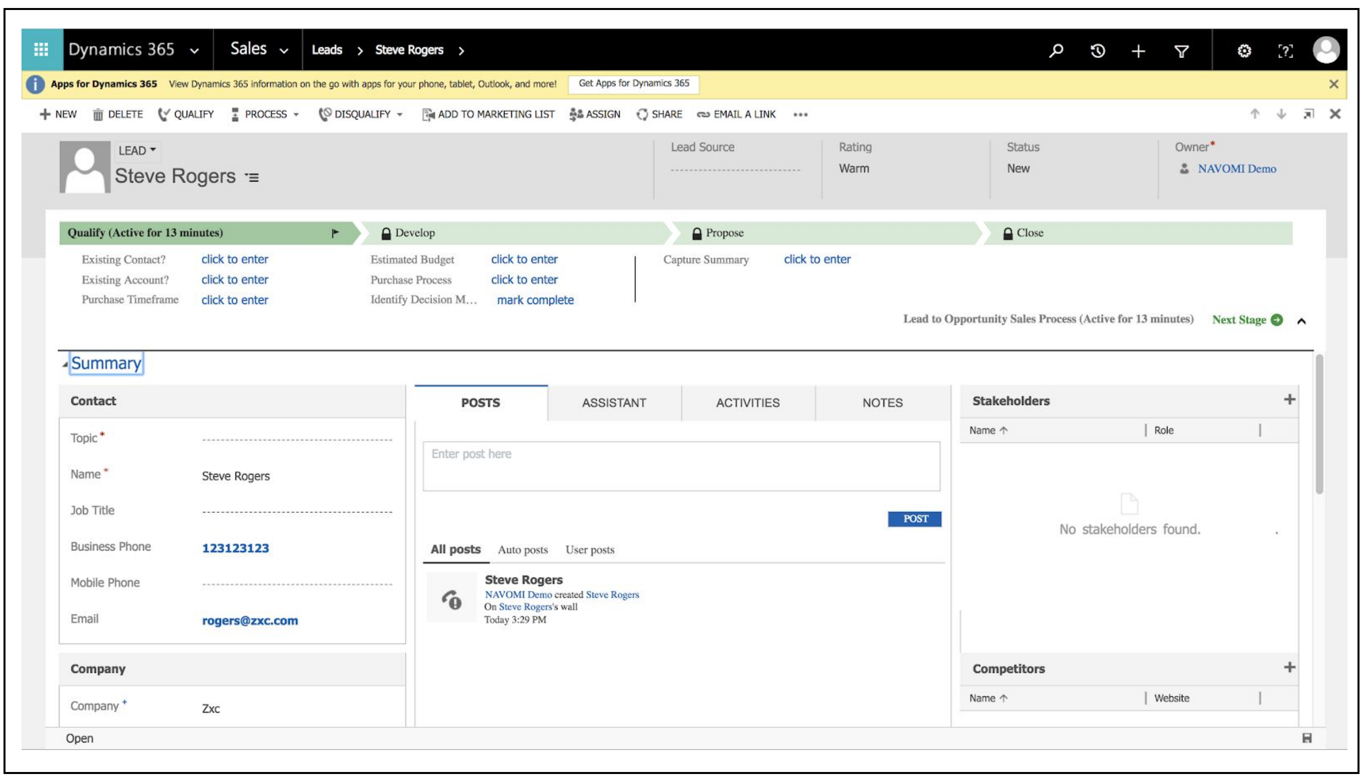
And use the search box at the top to find the record you want and click on it:



Or access directly the last record created in the Dashboard::

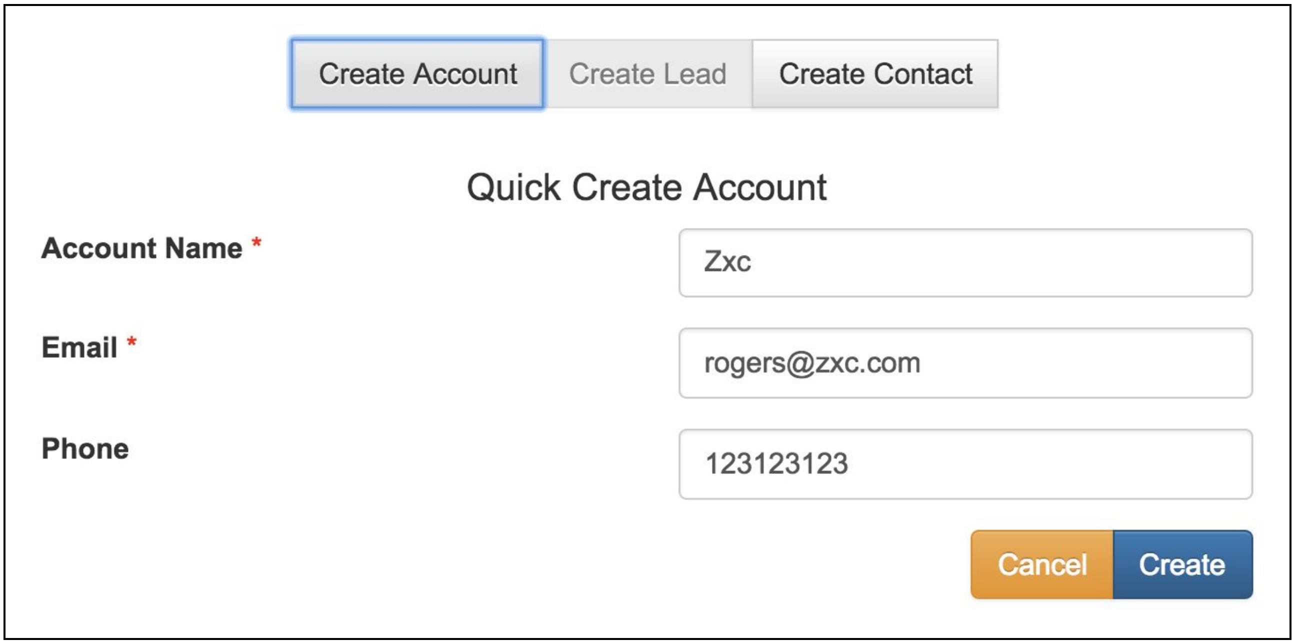


And when you click the last record, the window with the detailed data opens:



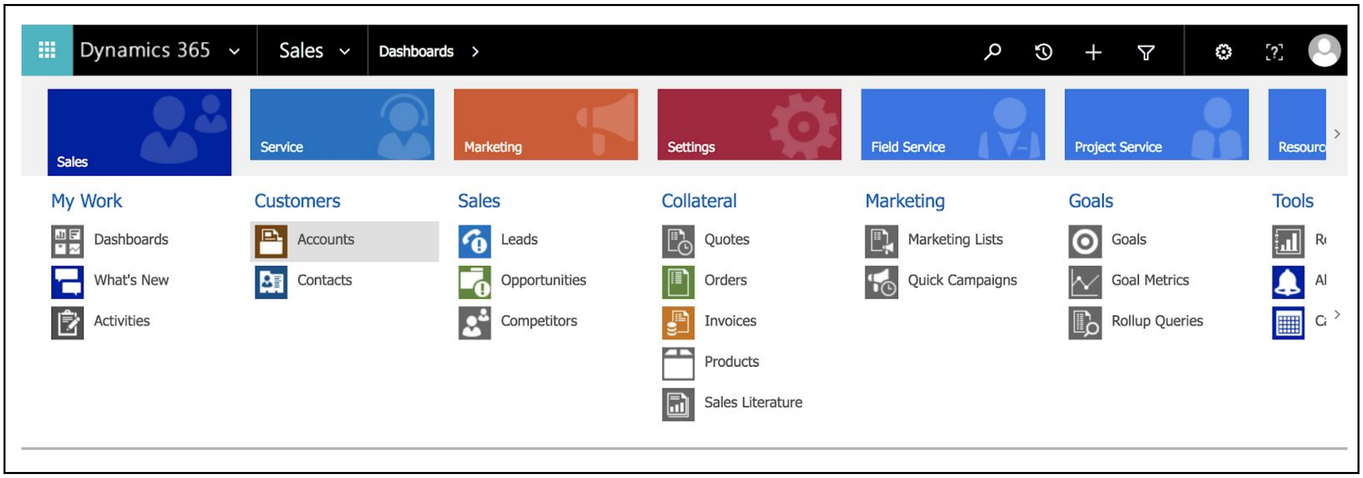
Create Account

Click on "Create Account" button and fill out the relevant fields and click on "Create". Some of the field values are automatically copied over from pre-chat survey, if the user fill out one before initiating the Chat.

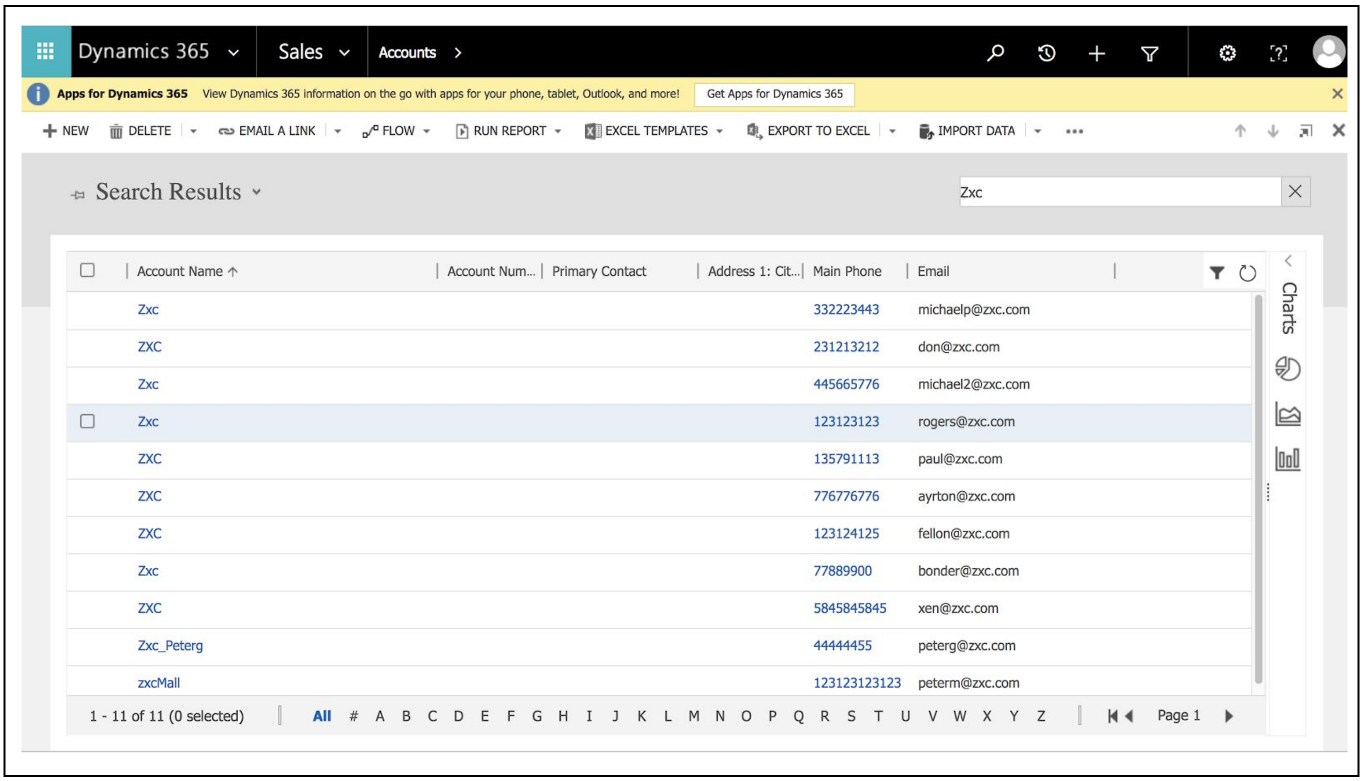


When the record is entered successfully, the message will be displayed:

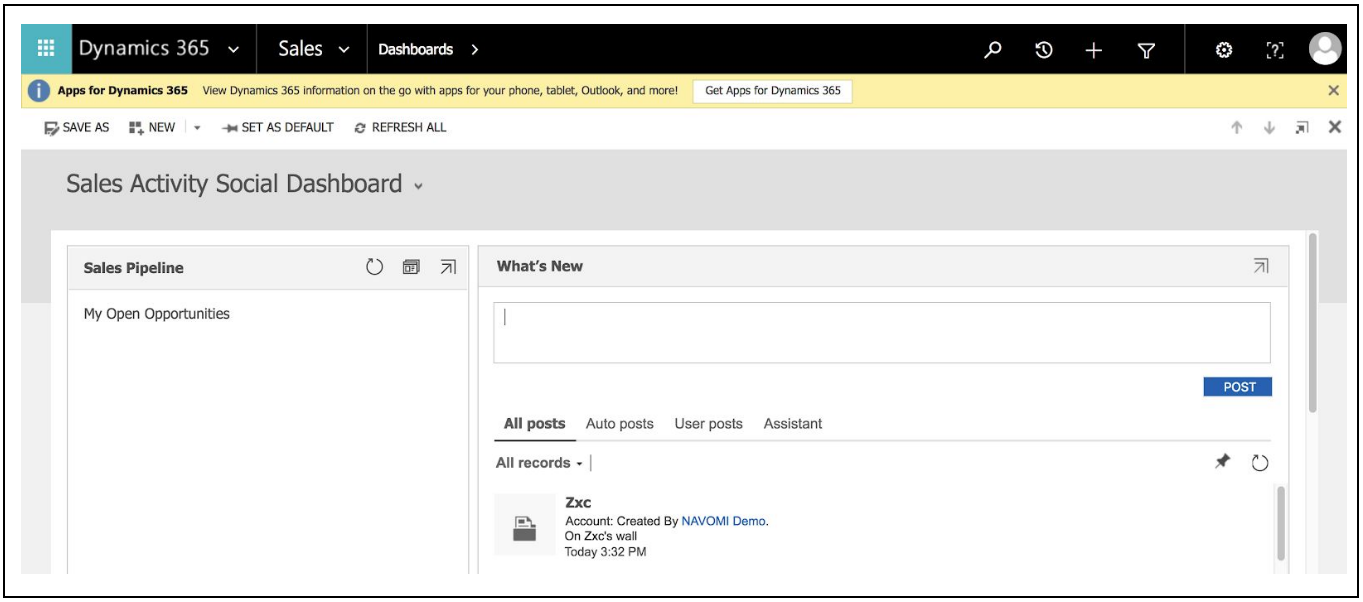
Note where this record will be stored in CRM system itself. Go to Accounts using the top menu:



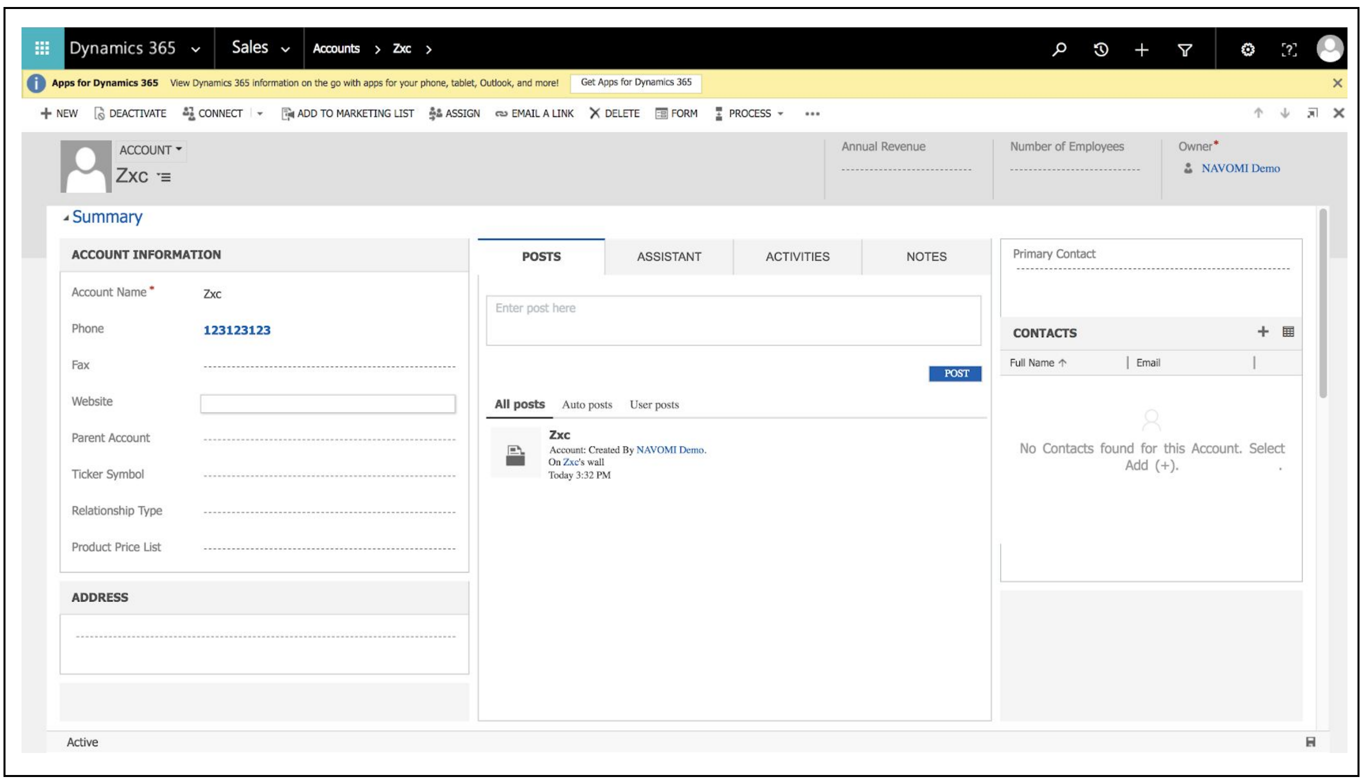
And use the search box at the top to find the record you want and click on it:



Or access directly the last record created in the Dashboard:

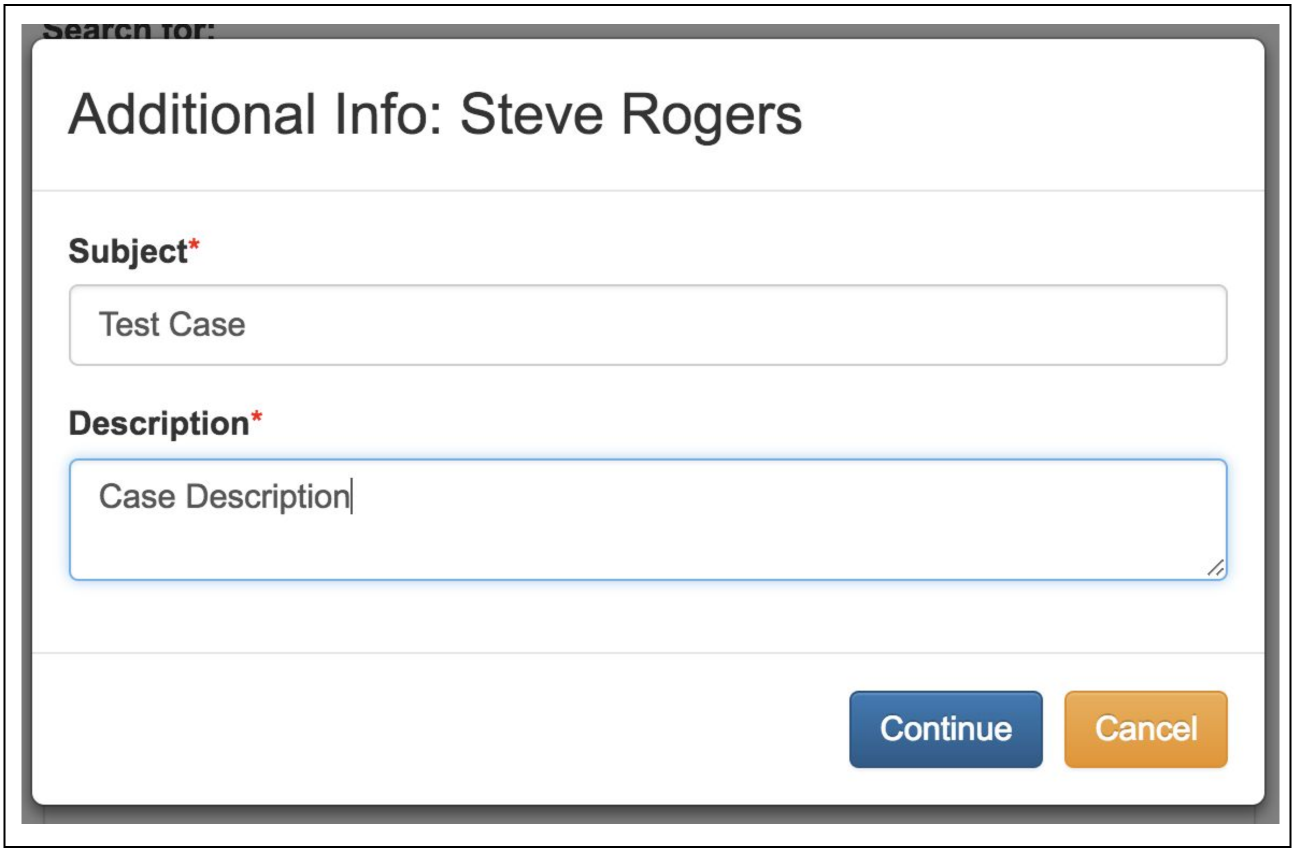


And when you click the last record, the window with the detailed data opens:



Create Case

Click on "Create Case" button and fill out the relevant fields and click on "Continue":



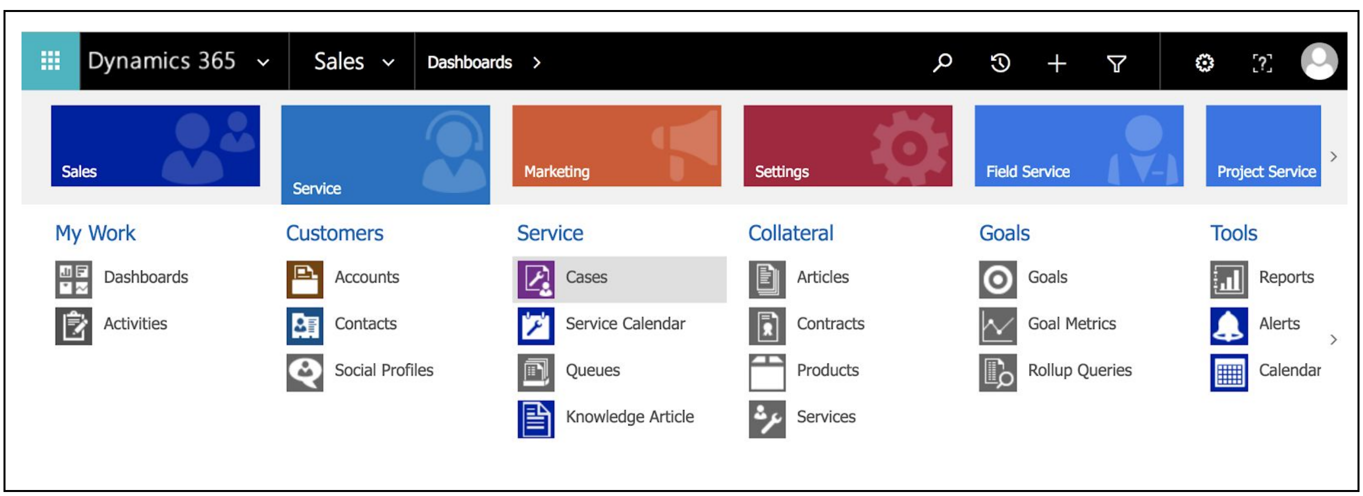
When the Case is entered successfully, this message will be displayed because when a Case is created, the chat is automatically transcripted to it:

Note! *"Create Case" can only be done when the chat session has ended. The "Create Case" button is disabled throughout an active engagement.*

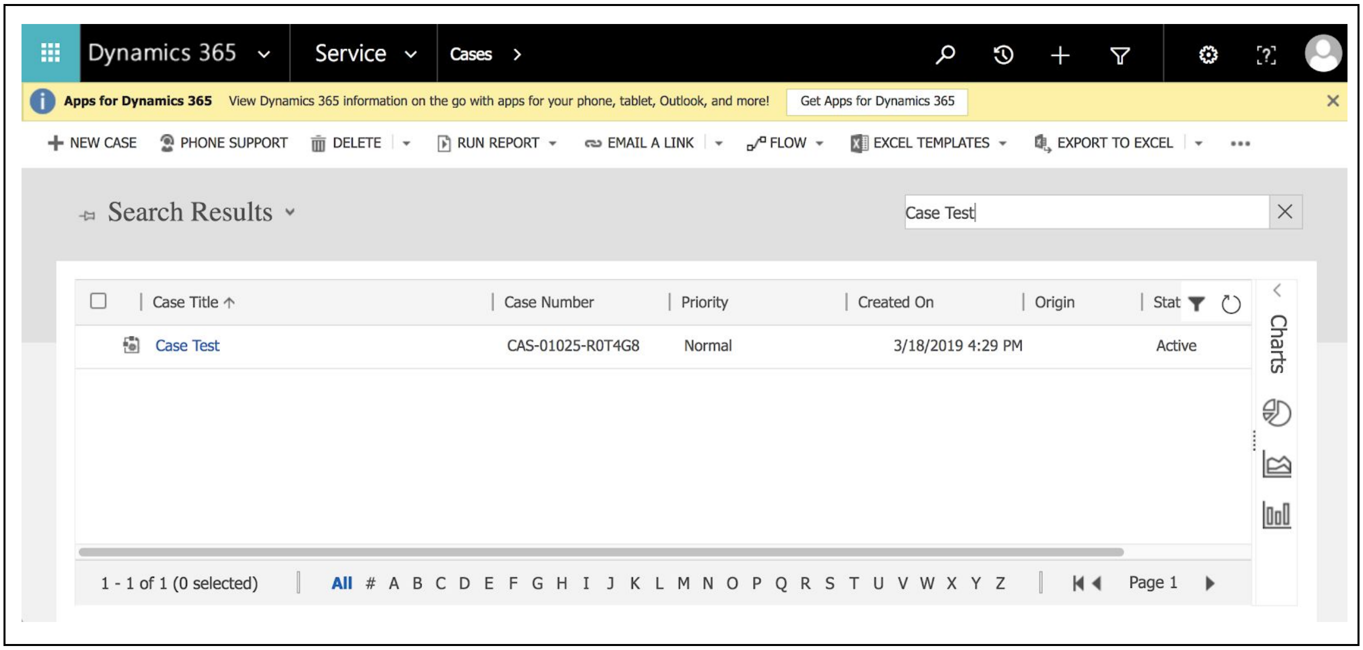
Disabled buttons appearance:

Enabled buttons appearance:

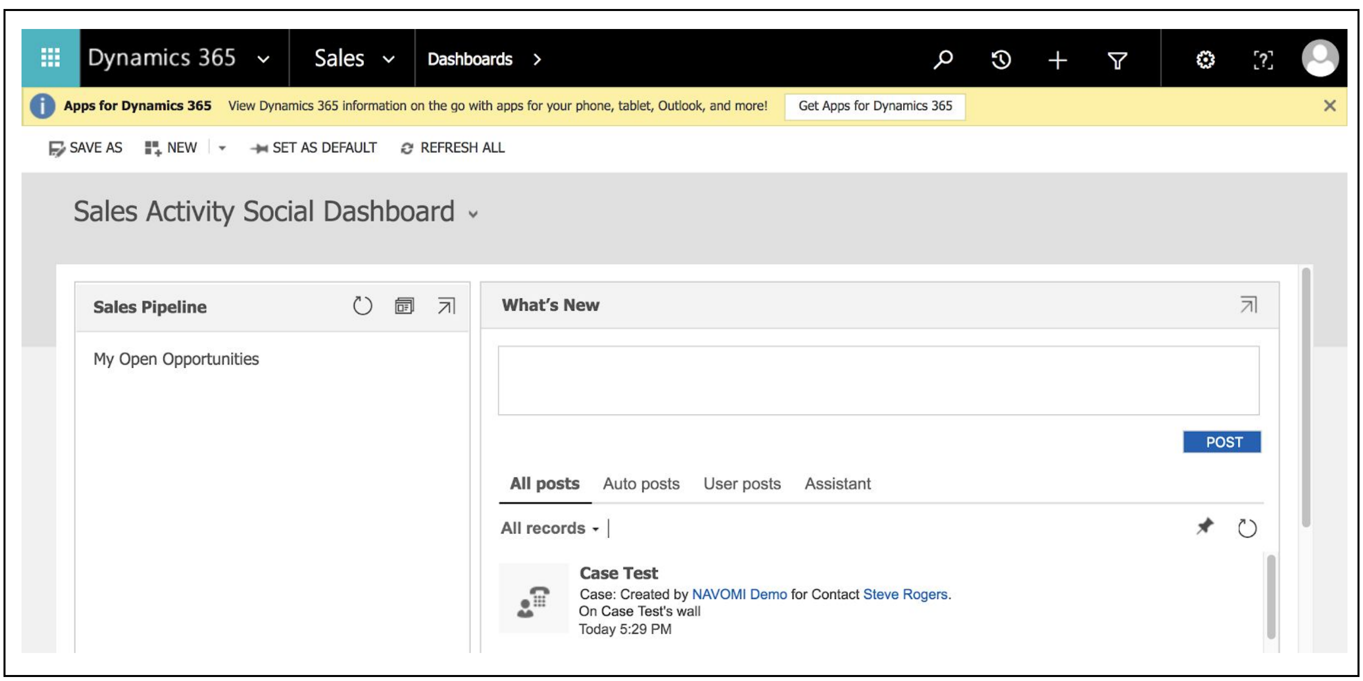
Note where this record will be stored in CRM system itself. Go to Cases using the top menu:



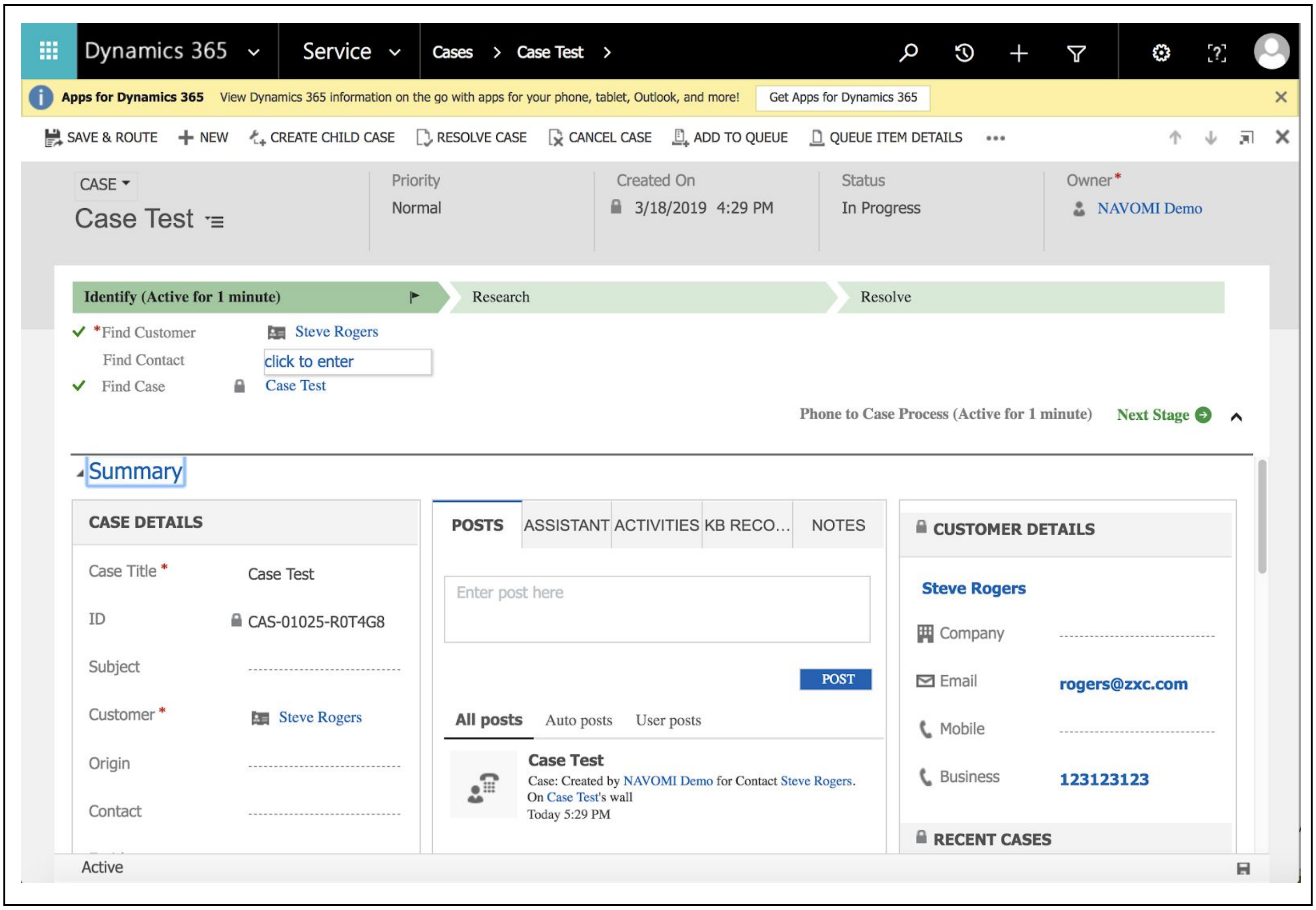
And use the search box at the top to find the record you want and click on it:



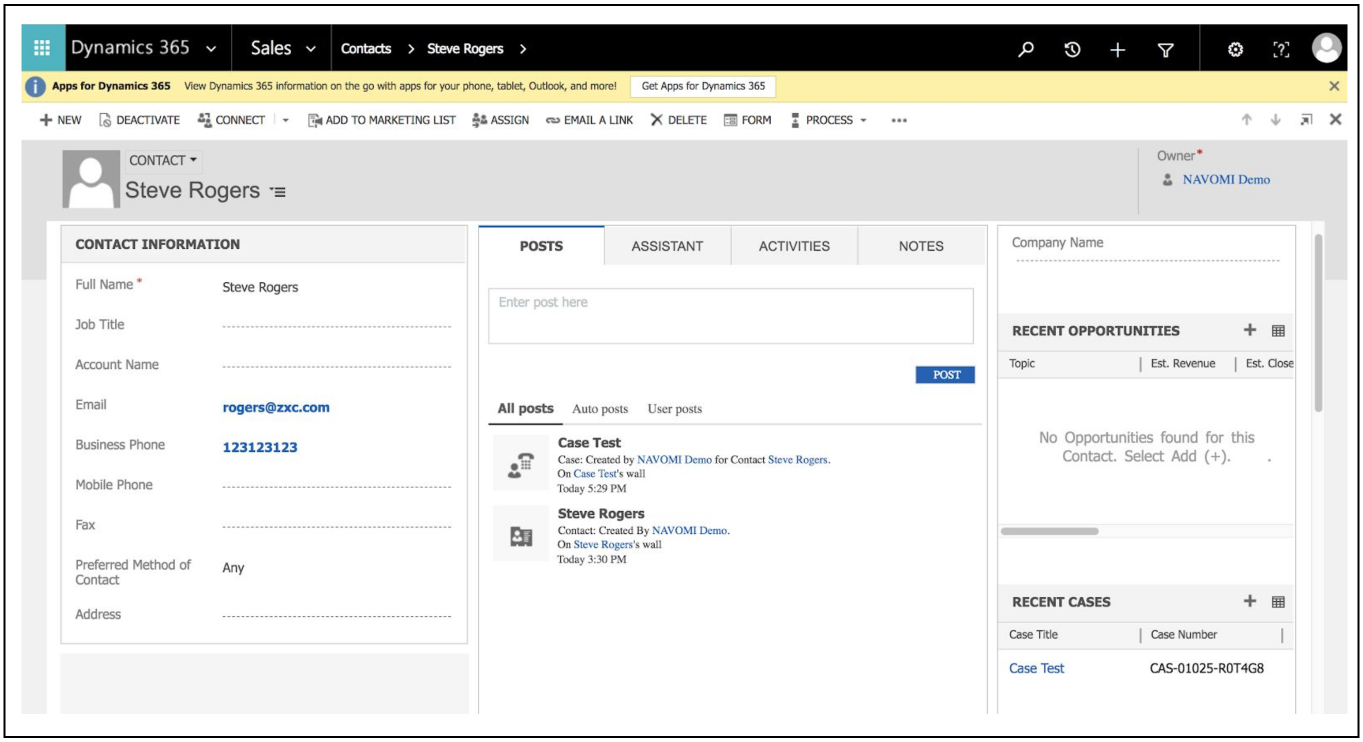
Or access directly the last record created in the Dashboard::



And when you click the last record, the window with the detailed data opens:



Or you can use a third way to access Cases: go to the Contact record, and the Cases are listed in two places: in the middle, in All Posts section or in the right menu section Recent Cases:



Link Chat Transcripts to Entity

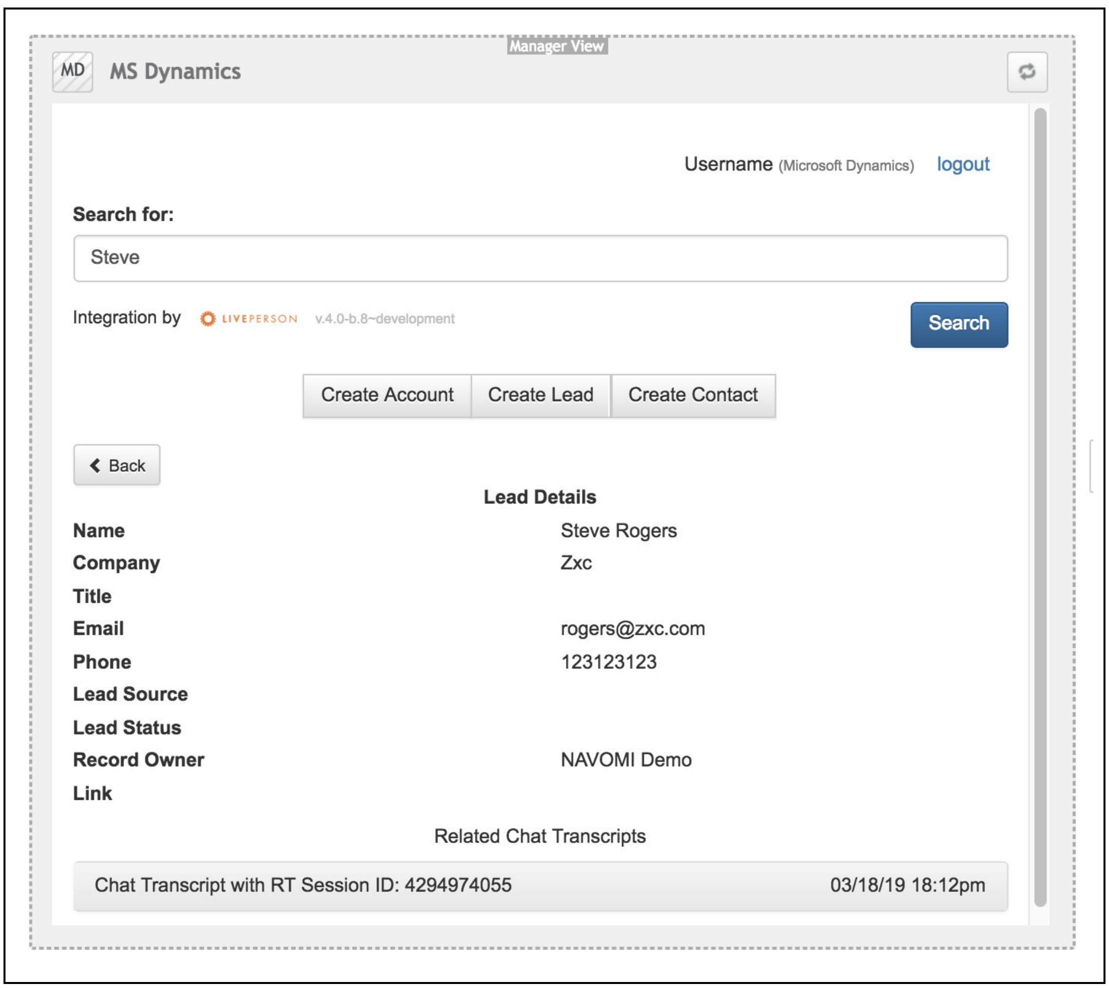
In case the chat is related to an existing Contact, or Lead, you can link the chat to that relevant record in MS Dynamics.

- You can attach a current chat transcript to a Contact or Lead record by clicking on the "Link Chat" button once the session has ended.

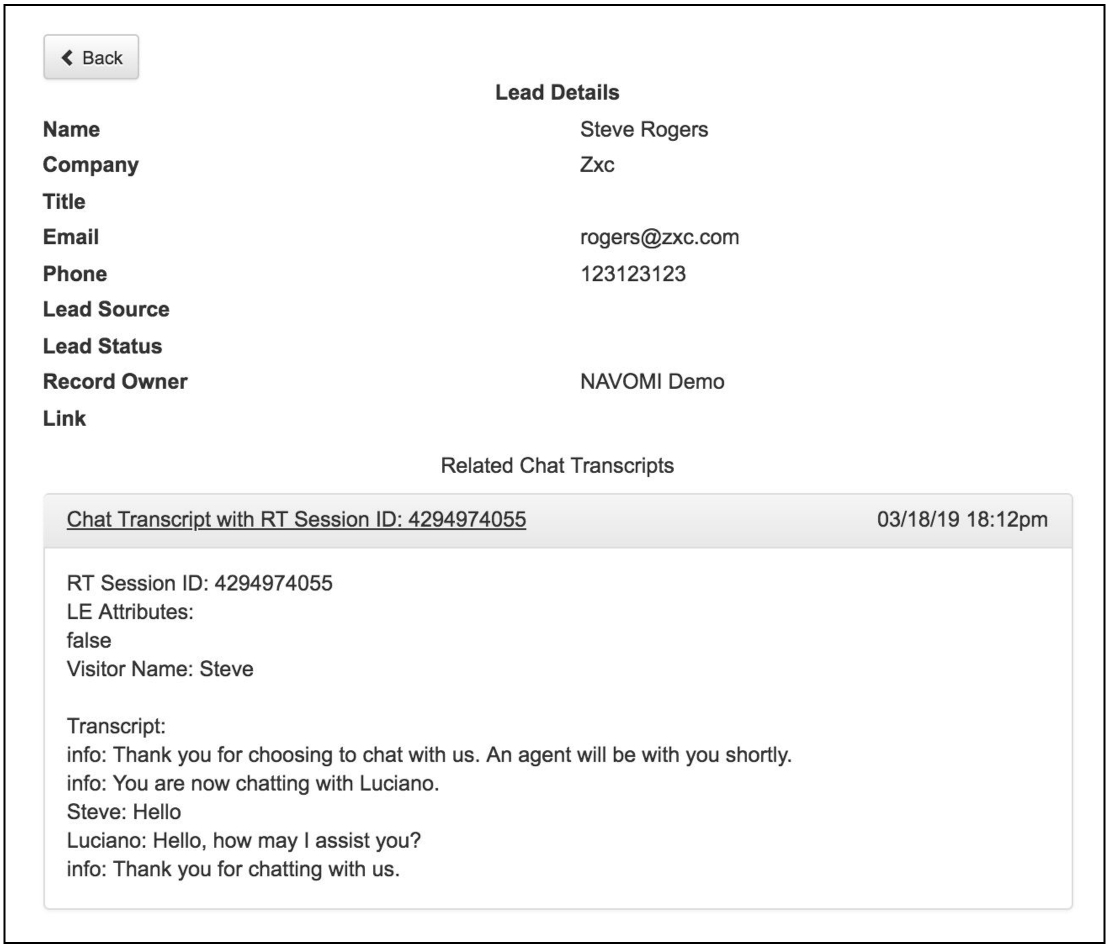
When the Chat is linked successfully, the message will be displayed:

To view chat history, click on the link of the record. It will expand out and showing the information in the top section.

- The bottom section will show all previous chat transcripts entries.

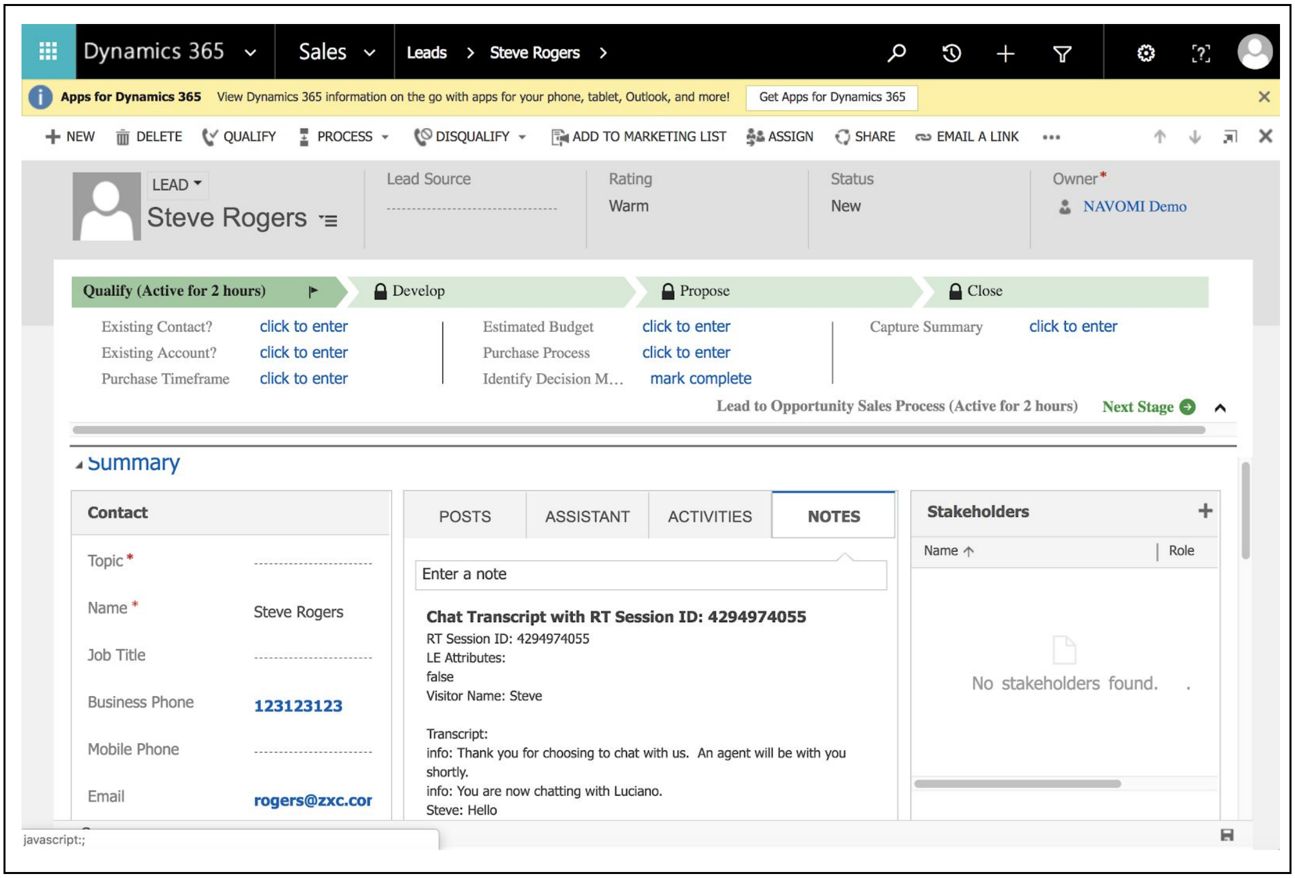


- Click on the specific transcript ID to see the full details of the chat transcripts as show in the screen below:



Note where this record will be stored in CRM system itself:

To see the Linked chats, go to the Lead / Contact record and click in "Notes" tab:



Note! “Link Chat” can only be done when the chat session has ended. The “Link Chat” button is disabled throughout an active engagement.

Disabled buttons appearance:

Enabled buttons appearance:

Updating Records

This functionality is currently not available. If a change is needed, you will need to login on MS Dynamics from a separate browser and make a change from there.

Unlink Chat Transcripts

This functionality is currently not available. Once a chat is linked to a record, it cannot be deleted, or unlinked from the widget. If a change is needed, you will need to login on MS Dynamics from a separate browser and make a change from there.