

# MS DYNAMICS Integration Guide

## LiveEngage CRM Widget

*by LivePerson, INC*

*last revised on: 2019-06-04*

# Table of Contents

<b>Table of Contents</b>	<b>2</b>
<b>Version Management</b>	<b>4</b>
<b>Introduction</b>	<b>5</b>
Supported LE Channels	5
<b>Set Up Guide</b>	<b>6</b>
Overview	6
Widget Sign Up	6
Configuring the CRM in the Widget Admin-Panel	8
Access the CRM Widget Admin Panel	8
Customer's Accounts	8
License Info	8
Agents (Deprecated)	9
Usage	9
Login Usage	10
Agent Usage	10
Search Usage:	11
Link Chat Usage:	11
Settings	12
Profile	12
Widget Config	13
LE Attributes Config	14
Support	15
LE Widget Info	16
Customer Accounts	17
Widget Config	18
Configure CRM	20
Azure Active Directory	20
App Registration	20
Permissions	23
Client Secret	24
Microsoft CRM Dynamics	27
Adding Widget in LiveEngage Console	29

<b>Features and Capabilities***</b>	<b>33</b>
Overview	33
Starting MS Dynamics Widget	33
Login Widget	34
Custom Functionalities	39
Search Records	39
Search Records Filter/Fields	40
View Records	42
View Transcript Associated With Records	45
Create New Records	48
Create Contact	49
Create Lead	53
Create Account	56
Create Case	59
Link Chat Transcripts to Entity	63
Updating Records	67
Unlink Chat Transcripts	67

## 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>

The image shows a 'Sign Up' form with the following fields and options:

- Company Name (text input)
- LiveEngage Admin First Name (text input)
- LiveEngage Admin Last Name (text input)
- LiveEngage Admin Email (text input)
- LiveEngage Account Number (text input)
- Choose Region (dropdown menu)
- Number of Agents (dropdown menu)
- CRM Integration (dropdown menu)
- Additional CRM Integration? (dropdown menu)
- By checking this box, you agree to our [terms of use](#) \*
- Sign Up button

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

The image shows a dropdown menu for 'CRM Integration' with the following options:

- ✓ CRM Integration (selected)
- Microsoft CRM Dynamics
- Netsuite
- Sugar CRM
- Zendesk
- Freshdesk

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](mailto: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

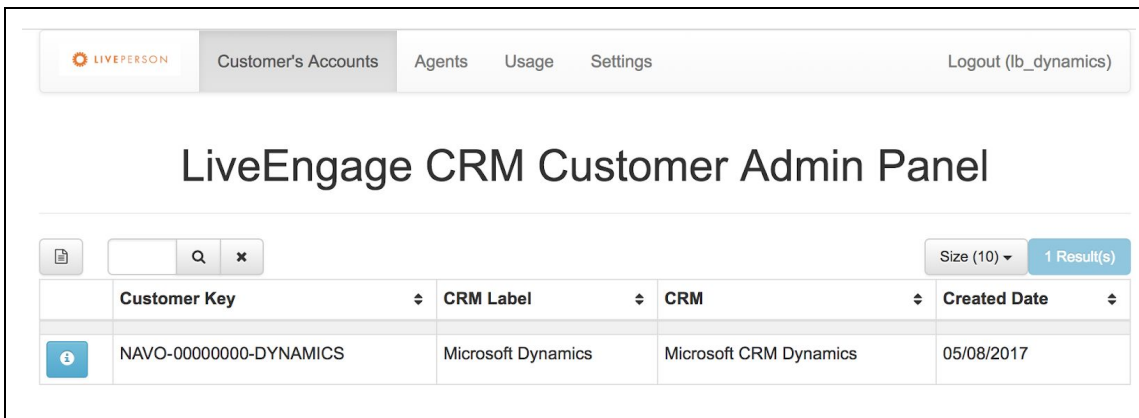
1. Make sure you receive the username and password from your Account Manager.
2. Go to the installation URL: <https://lpcrm.fs.liveperson.com/admin-panel>

### 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



The screenshot shows the 'LiveEngage CRM Customer Admin Panel' interface. At the top, there is a navigation bar with the 'LIVEPERSON' logo, a breadcrumb trail 'Customer's Accounts > Agents > Usage > Settings', and a 'Logout (lb\_dynamics)' link. The main heading is 'LiveEngage CRM Customer Admin Panel'. Below this is a search bar with a magnifying glass icon and a close button. To the right of the search bar, there is a 'Size (10)' dropdown and a '1 Result(s)' indicator. The main content is a table with the following columns: 'Customer Key', 'CRM Label', 'CRM', and 'Created Date'. Each column has a small downward arrow icon. The table contains one row with the following data: 'NAVO-00000000-DYNAMICS' in the 'Customer Key' column, 'Microsoft Dynamics' in the 'CRM Label' column, 'Microsoft CRM Dynamics' in the 'CRM' column, and '05/08/2017' in the 'Created Date' column. There is a blue square icon with a white 'i' (info icon) to the left of the 'Customer Key' cell.

Customer Key	CRM Label	CRM	Created Date
NAVO-00000000-DYNAMICS	Microsoft Dynamics	Microsoft CRM Dynamics	05/08/2017

- 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](#).



## LiveEngage CRM Customer Admin Panel

[← Back](#)

### License Info

<b>Customer Key</b>	NAVO-00000000-DYNAMICS
<b>CRM Type</b>	Microsoft CRM Dynamics
<b>CRM Label</b>	<a href="#">Edit</a> Microsoft Dynamics
<b>Service Root URL</b>	<a href="#">Edit</a> https://<YOUR_CRM_SUBDOMAIN>.dynamics.com
<b>Use Plasma</b>	<a href="#">Edit</a> <input type="checkbox"/>
<b>Client ID</b>	<a href="#">Hide</a> <a href="#">Edit</a> <YOUR_CLIENT_ID>
<b>Client Secret</b>	<a href="#">Hide</a> <a href="#">Edit</a> YOUT_CLIENT_SECRET>
<b>Created At</b>	05/09/2017

### Agents (Deprecated)

Link: Admin Panel → Agents

This session will not be addressed as it is deprecated

The screenshot shows the LiveEngage CRM Customer Admin Panel with the 'Agents' tab selected. The navigation bar includes 'LIVEPERSON', 'Customer's Accounts', 'Agents', 'Usage', 'Settings', and 'Logout (lbZendesk)'. Below the title 'LiveEngage CRM Customer Admin Panel', there is a 'New Agents' button and a table with columns for 'Username' and 'CRM'.

### Usage

Link: Admin Panel → Usage

See the follow usage statistics from the account:

The screenshot shows the LiveEngage CRM Customer Admin Panel. The navigation bar includes 'LIVEPERSON', 'Customer's Accounts', 'Agents', 'Usage' (selected), and 'Settings'. A 'Logout (lbZendesk)' link is in the top right. The main heading is 'LiveEngage CRM Customer Admin Panel'. Below it are tabs for 'Login Usage', 'Agent Usage' (selected), 'Search Usage', and 'Link Chat Usage'. The section title is 'Per Agent Login Count'. A search bar and a 'Size (10)' dropdown are present. A table displays usage statistics for Agent Luciano.

Agent Username	Last 7 Days Usage	Current Month Usage	Previous Month Usage	Total Logins
Luciano	0	0	1	3

### Login Usage

See the login statistics from each Agent by:

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

This screenshot is identical to the one above, showing the 'Per Agent Login Count' table for Agent Luciano with 0 last 7 days usage, 0 current month usage, 1 previous month usage, and 3 total logins.

### Agent Usage

See the login statistics from all Agents by:

- Last 7 Days
- Currently Month
- Previous Month

- Total Logins

The screenshot shows the 'LiveEngage CRM Customer Admin Panel' with the 'Agent Usage' tab selected. The main heading is 'Total Agent Logins'. Below the heading is a table with four columns: 'Last 7 Days Usage', 'Current Month Usage', 'Previous Month Usage', and 'Total Logins'. The values are 3, 4, 2, and 8 respectively. There are also navigation tabs for 'Login Usage', 'Search Usage', and 'Link Chat Usage'. A 'Size (10)' dropdown and '1 Result(s)' indicator are visible in the top right.

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

The screenshot shows the 'LiveEngage CRM Customer Admin Panel' with the 'Search Usage' tab selected. The main heading is 'Search Count'. Below the heading is a table with four columns: 'Past 7 Days Usage', 'Current Month Usage', 'Past Month Usage', and 'Total Usage Till Date'. The values are 10, 10, and 56 respectively. There are also navigation tabs for 'Login Usage', 'Agent Usage', and 'Link Chat Usage'. A 'Size (10)' dropdown and '1 Result(s)' indicator are visible in the top right.

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

### LiveEngage CRM Customer Admin Panel

Login Usage   Agent Usage   Search Usage   **Link Chat Usage**

Create Ticket Count

Past 7 Days Usage	Current Month Usage	Past Month Usage	Total Usage Till Date
2	2		12


Link Chat Count

Past 7 Days Usage	Current Month Usage	Past Month Usage	Total Usage Till Date
1	1		7

## Settings

Link: Admin Panel → Settings

Here you can check and update your profile information.

 Customer's Accounts   Agents   Usage   **Settings**   Logout (elmer)

### LiveEngage CRM Customer Admin Panel

Profile   **Widget Config**   LE Attributes Config   Support   LE Widget Info

**Company**   Acme

**Contact Name**   Elmer Fudd

**Email**   elmer@acme.com

**Username**   elmer

[Update Profile](#)

## 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.

## LiveEngage CRM Customer Admin Panel

- Profile
- Widget Config
- LE Attributes Config
- Support
- LE Widget Info

<b>Company</b>	Acme
<b>Contact Name</b>	Elmer Fudd
<b>Email</b>	elmer@acme.com
<b>Username</b>	elmer

[Update Profile](#)

### Widget Config

Link: Admin Panel → Settings → Widget Config

This is detailed in the section [Widget Config](#).

# LiveEngage CRM Customer Admin Panel

Profile   **Widget Config**   LE Attributes Config   Support   LE Widget Info

## Dynamics Config

- Create Account
  - Auto Link Chat(Account)
- Create Case (only for Account and Contacts) - beta
- Create Contact
  - Auto Link Chat(Contact)
- Create Lead
  - Auto Link Chat(Lead)
  - Skip Info Prompt
- Auto Create Lead
- Exclude Chat Transcript (only Chat Session ID will be mentioned)
- Disable Search

**Select a Search Field**   Name ▾  
Widget will use **Name** field to search records.

- Add Custom Survey Questions ⓘ

**Save 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.*

# LiveEngage CRM Customer Admin Panel

Profile   Widget Config   **LE Attributes Config**   Support   LE Widget Info

**LE Attributes:** ⓘ

**Unassigned Attributes:**

- VisitorInfo**
  - waitTime
  - country
  - device
  - isp
  - organization
  - operatingSystem
  - browser
  - visitStartTime
  - IpAddress
- CustomerInfo**
  - customerId
  - balance
  - currency
  - socialId
  - imei
  - userName
  - companySize
  - accountName
  - role
  - lastPaymentDate
  - registrationDate
  - storeZipCode
  - storeNumber
- MarketingInfo**
  - originatingChannel
  - affiliate
  - campaignId

**Assigned Attributes:**

- VisitorInfo**
  - visitorName
  - city
- CustomerInfo**
  - type
  - status

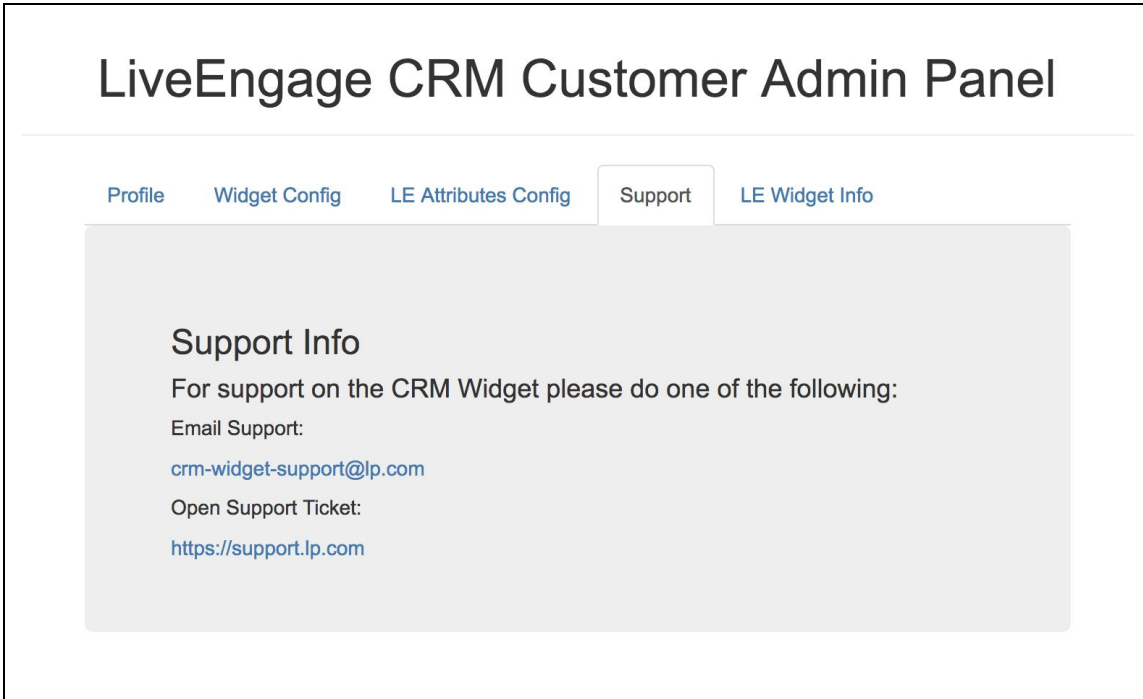
>

<

## Support

Link: Admin Panel → Settings → Support

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

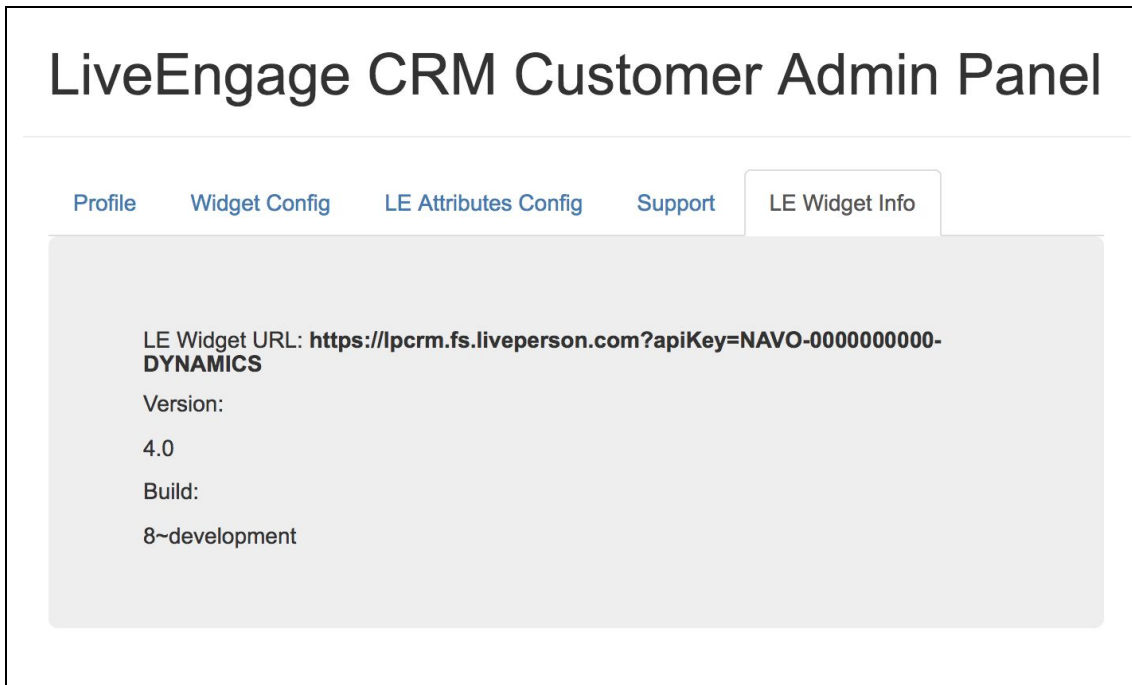


### **LE Widget Info**

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](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")

## LiveEngage CRM Customer Admin Panel

[← Back](#)

### License Info

<b>Customer Key</b>	NAVO-00000000-DYNAMICS
<b>CRM Type</b>	Microsoft CRM Dynamics
<b>CRM Label</b>	<a href="#">Edit</a> Microsoft Dynamics
<b>Service Root URL</b>	<a href="#">Edit</a> https://<YOUR_CRM_SUBDOMAIN>.dynamics.com
<b>Use Plasma</b>	<a href="#">Edit</a> <input type="checkbox"/>
<b>Client ID</b>	<a href="#">Hide</a> <a href="#">Edit</a> <YOUR_CLIENT_ID>
<b>Client Secret</b>	<a href="#">Hide</a> <a href="#">Edit</a> YOUT_CLIENT_SECRET>
<b>Created At</b>	05/09/2017

## Widget Config

Link: Admin Panel → Settings → Widget Config


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


# LiveEngage CRM Customer Admin Panel

Profile | **Widget Config** | LE Attributes Config | Support | LE Widget Info

## Dynamics Config

- Create Account
  - Auto Link Chat(Account)
- Create Case (only for Account and Contacts) - beta
- Create Contact
  - Auto Link Chat(Contact)
- Create Lead
  - Auto Link Chat(Lead)
  - Skip Info Prompt
- Auto Create Lead
- Exclude Chat Transcript (only Chat Session ID will be mentioned)
- Disable Search

**Select a Search Field**    
*Widget will use **Name** field to search records.*

- Add Custom Survey Questions 

**Save Config**

- 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.

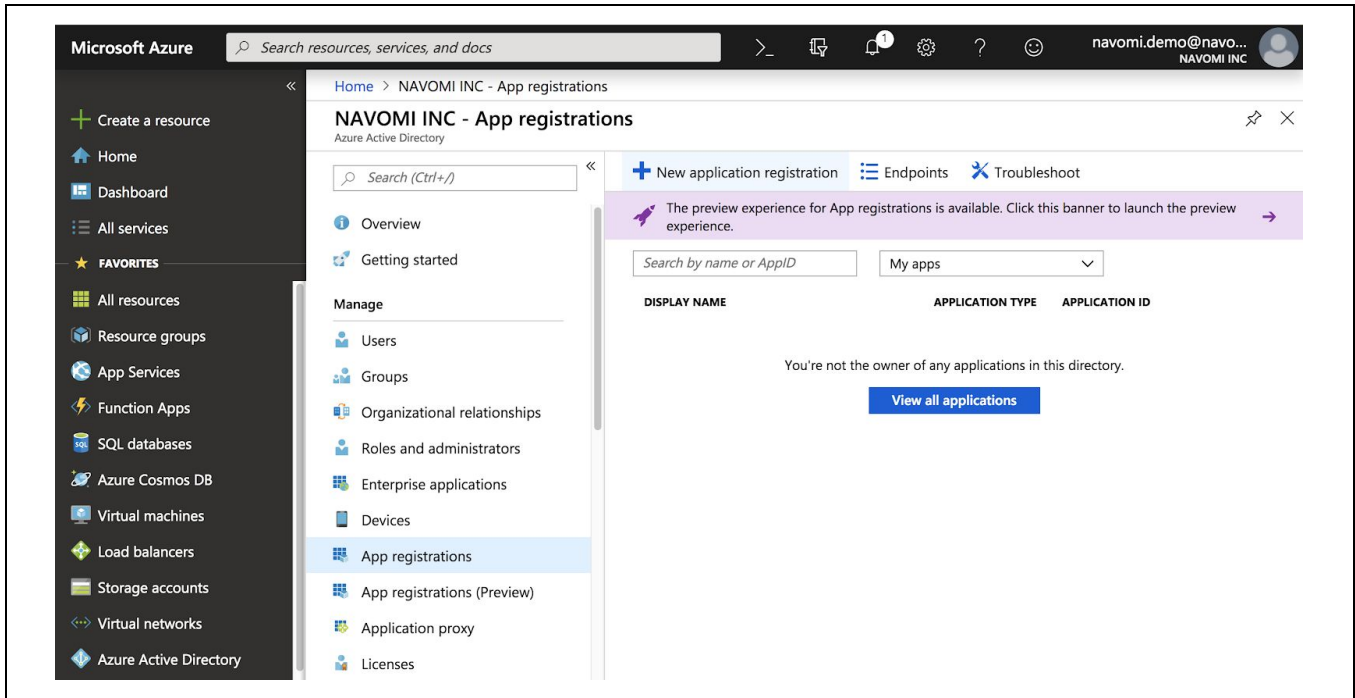
### Azure Active Directory

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

### Register an application ✕

**\* Name**  
The user-facing display name for this application (this can be changed later).

 ✓

**Supported account types**  
Who can use this application or access this API?

Accounts in this organizational directory only (NAVOMI INC)

Accounts in any organizational directory

Accounts in any organizational directory and personal Microsoft accounts (e.g. Skype, Xbox, Outlook.com)

[Help me choose...](#)

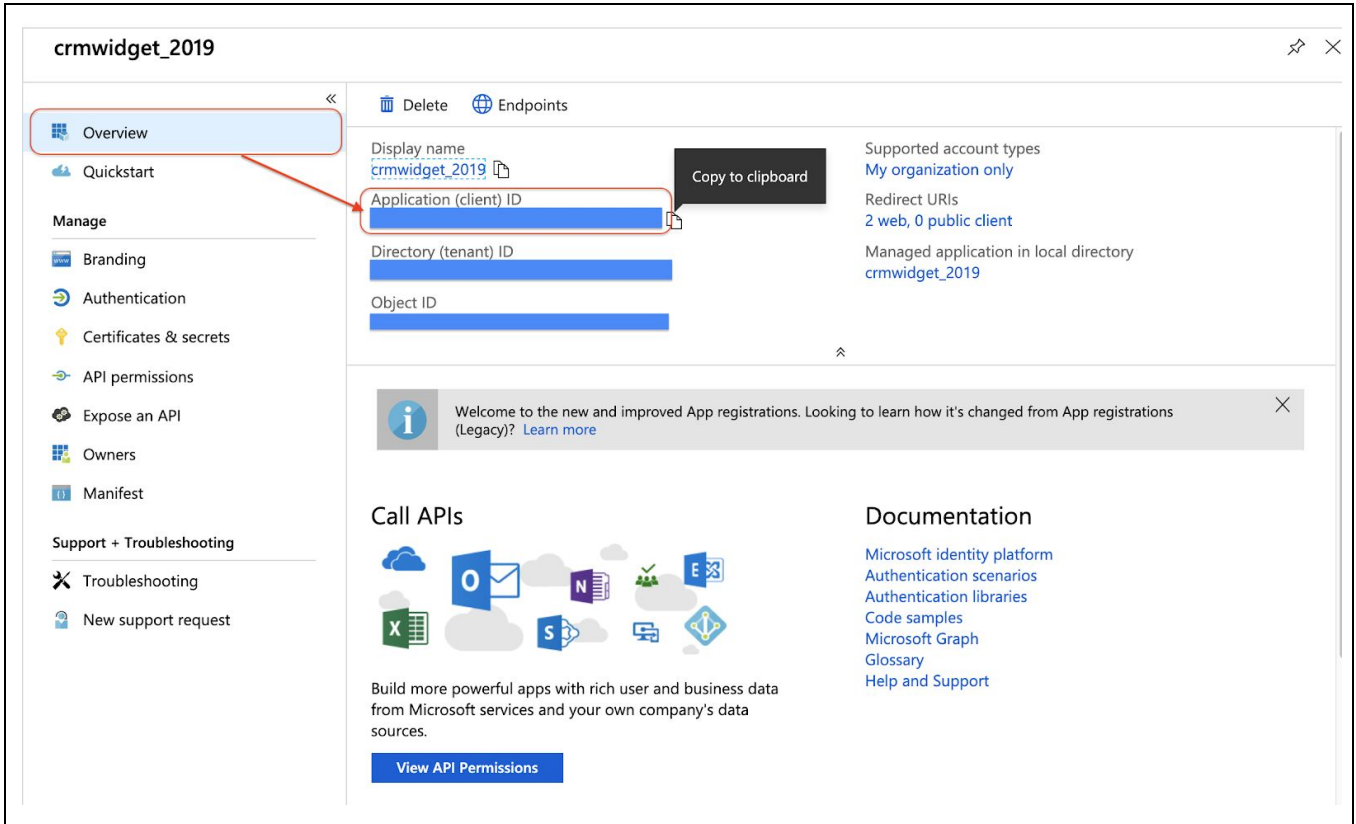
**Redirect URI (optional)**  
We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

  ✓

[By proceeding, you agree to the Microsoft Platform Policies](#) 🔗

[Register](#)

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"

crmwidget\_2019 - API per

< All APIs

Dynamics CRM  
https://admin.services.crm.dynamics.com/ Docs

What type of permissions does your application require?

Delegated permissions  
Your application needs to access the API as the signed-in user.

Application permissions  
Your application runs as a background service or daemon without a signed-in user.

Select permissions [expand all](#)

Type to search

PERMISSION	ADMIN CONSENT REQUIRED
<input checked="" type="checkbox"/> user_impersonation Access Common Data Service as organization users	-

Add permissions Discard

## Client Secret

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



crmwidget\_2019 - Certificates & secrets

Overview  
Quickstart

Manage

Branding  
Authentication  
**Certificates & secrets**  
API permissions  
Expose an API  
Owners  
Manifest

Support + Troubleshooting

Troubleshooting  
New support request

Credentials enable applications to identify themselves to the authentication service when receiving tokens at a web addressable location (using an HTTPS scheme). For a higher level of assurance, we recommend using a certificate (instead of a client secret) as a credential.

**Certificates**

Certificates can be used as secrets to prove the application's identity when requesting a token. Also can be referred to as public keys.

Upload certificate

THUMBPRINT	START DATE	EXPIRES
No certificates have been added for this application.		

**Client secrets**

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

New client secret

DESCRIPTION	EXPIRES	VALUE
-------------	---------	-------

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".

Add a client secret

Description

Description

Expires

In 1 year  
 In 2 years  
 Never

Add Cancel

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

**crmwidget\_2019 - Certificates & secrets**

Copy the new client secret value. You won't be able to retrieve it after you leave this blade.

Credentials enable applications to identify themselves to the authentication service when receiving tokens at a web addressable location (using an HTTPS scheme). For a higher level of assurance, we recommend using a certificate (instead of a client secret) as a credential.

### Certificates

Certificates can be used as secrets to prove the application's identity when requesting a token. Also can be referred to as public keys.

[Upload certificate](#)

THUMBPRINT	START DATE	EXPIRES
No certificates have been added for this application.		

### Client secrets

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

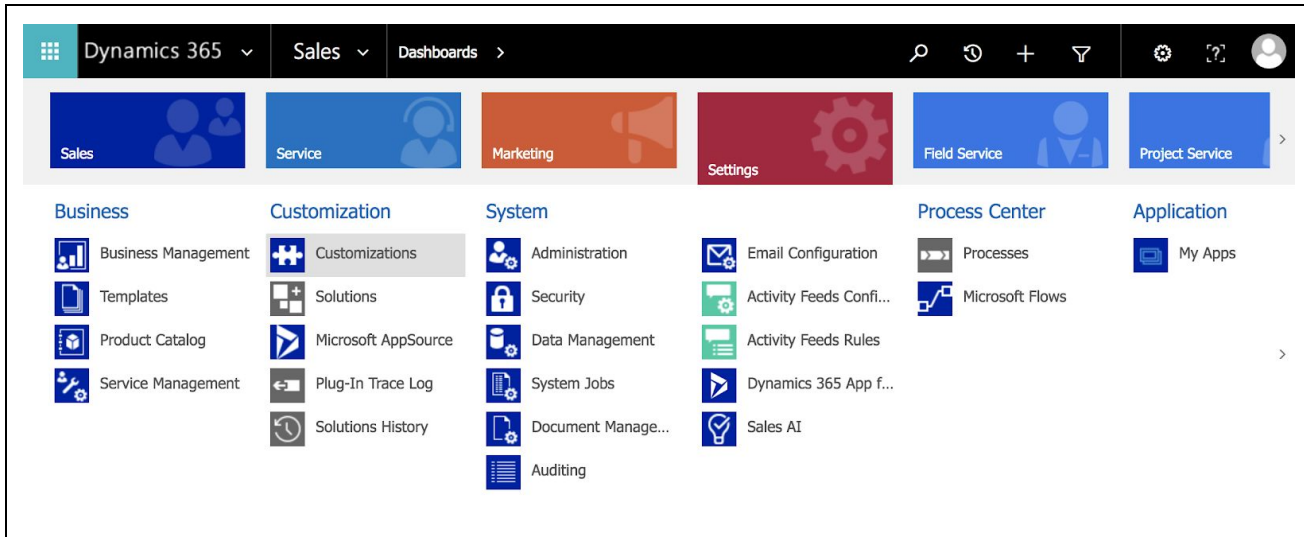
[New client secret](#)

DESCRIPTION	EXPIRES	VALUE
CRMWIDGET_2019	12/31/2299	[Redacted Value]

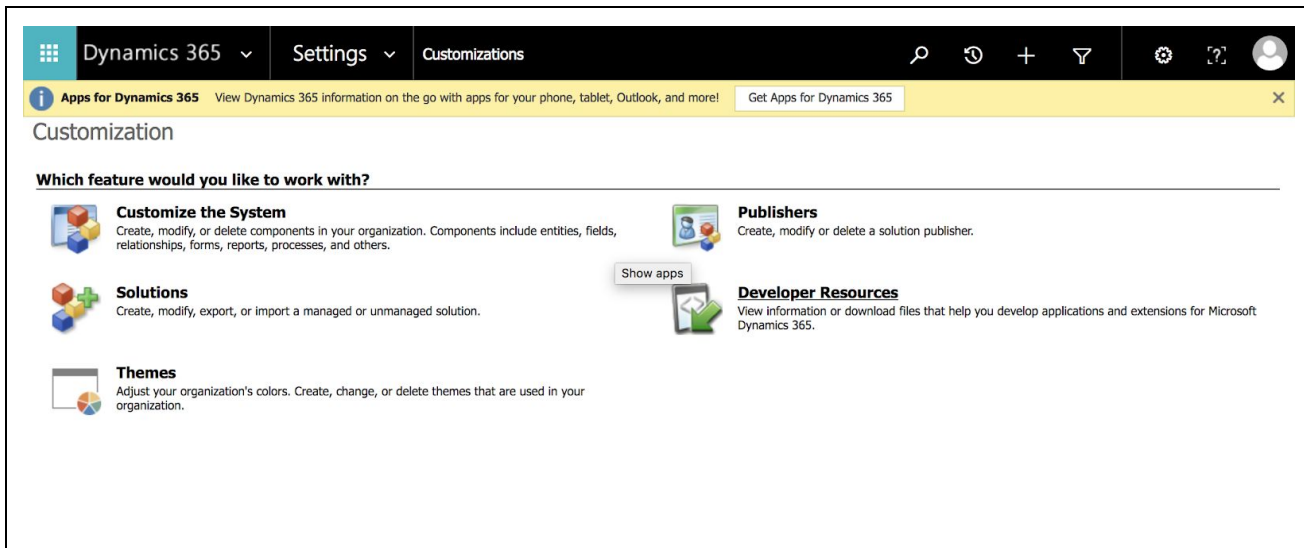
Copy to clipboard

## Microsoft CRM Dynamics

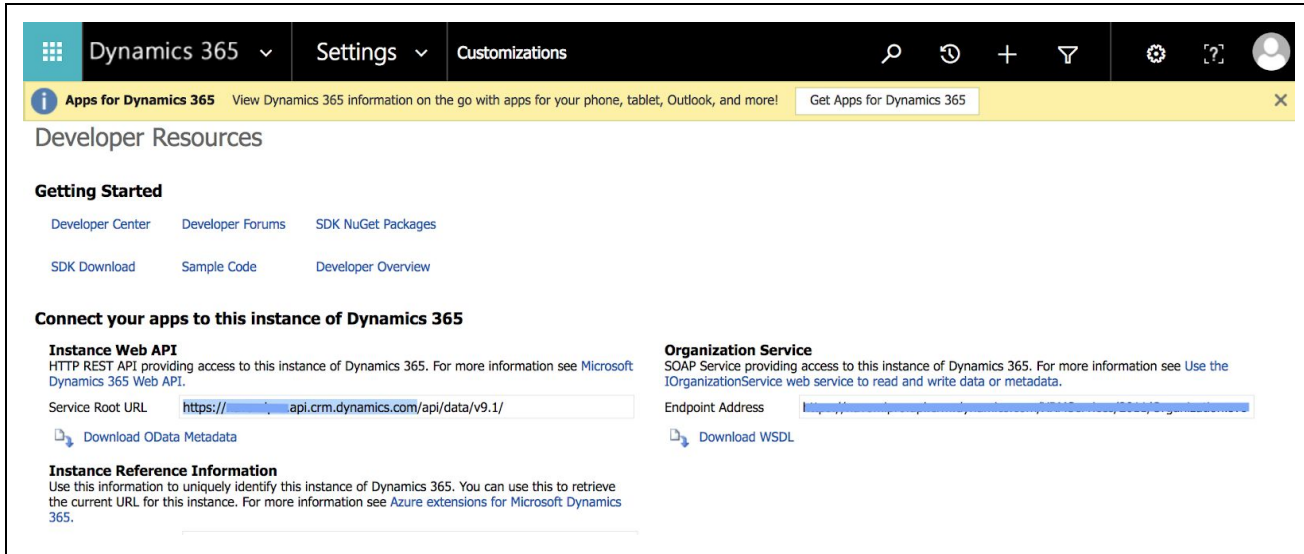
1. Login to your Microsoft CRM Dynamics as an admin and click on Settings → Customizations on top menu:



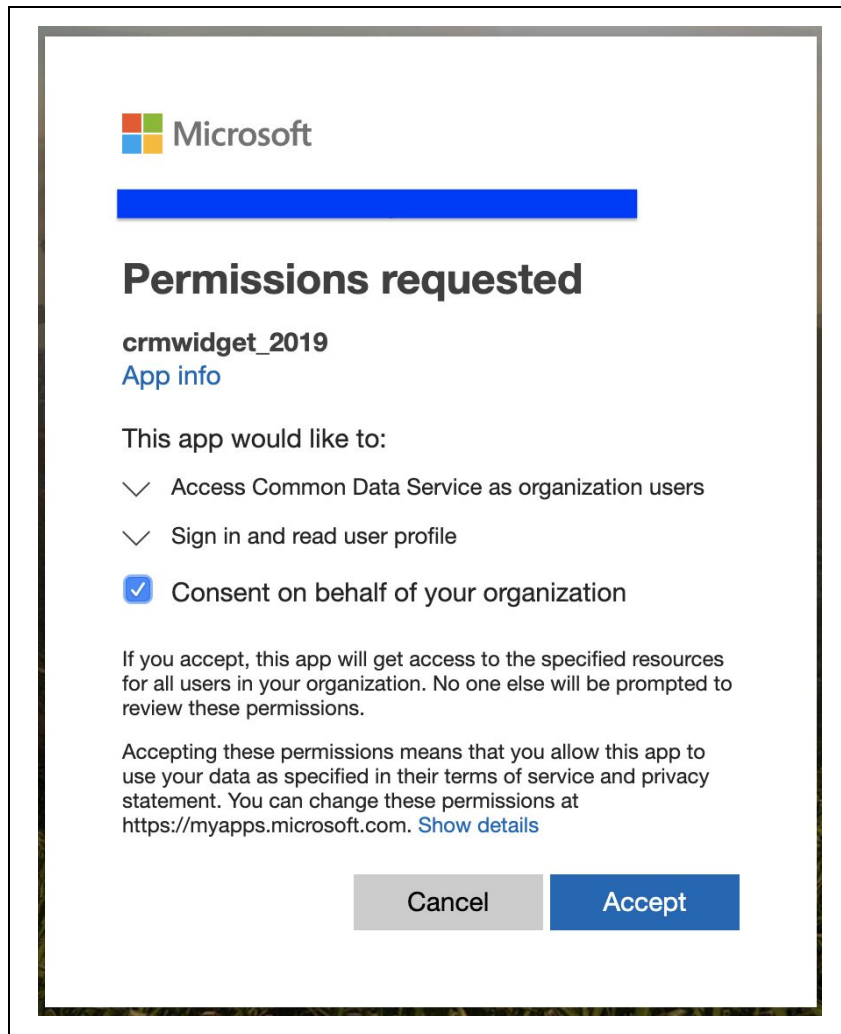
2. Click on "Developer Resources":



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:



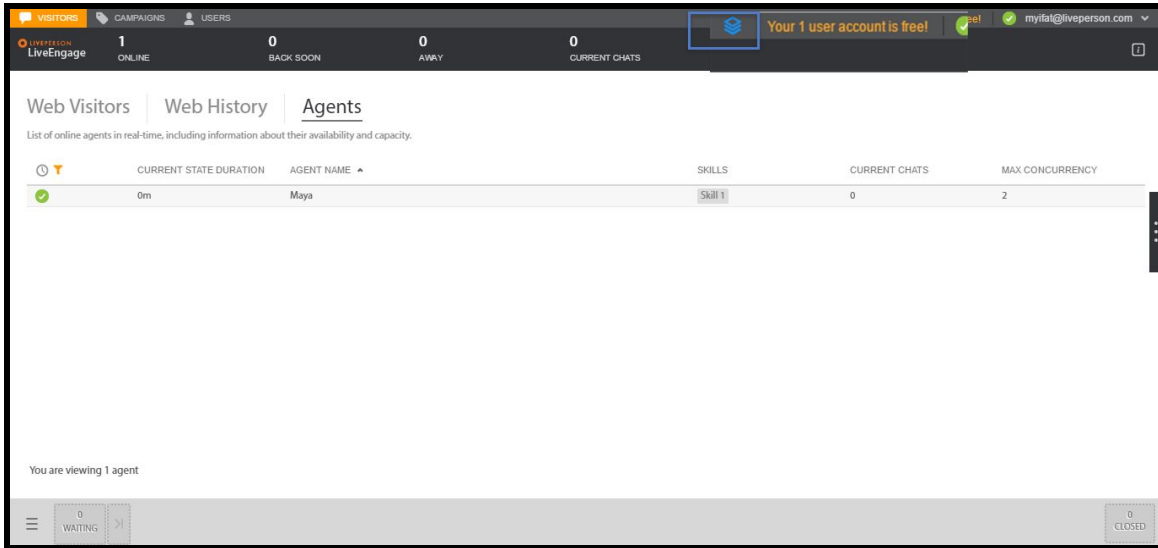
Just Consent and Accept!

## Adding Widget in LiveEngage Console

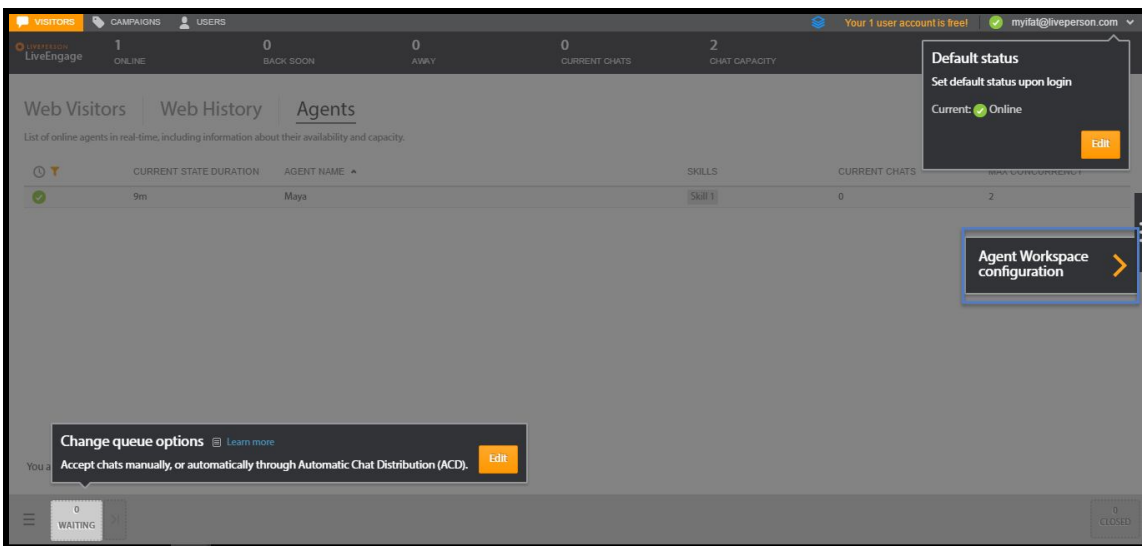
Now that you've updated the CRM Widget profile and license information, it is time to go to LiveEngage and configure the widget.

*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:

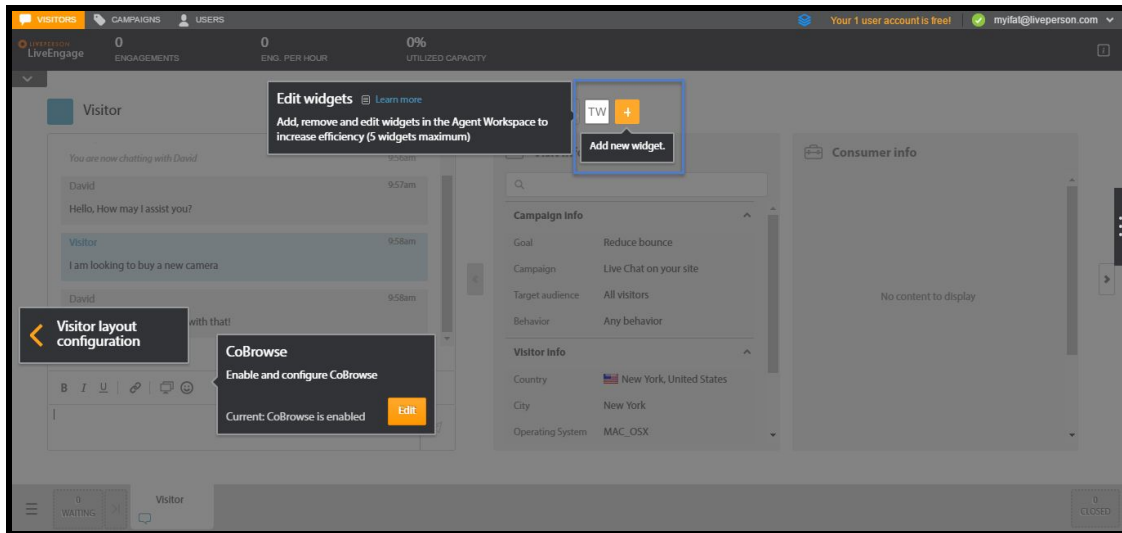


2. Once in Night Vision, click on “Agent Workspace Configuration”:



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

## LE - MS DYNAMICS Integration Guide



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"

Integration widget

Widget name: Migration

Widget label: MI

+ Add description

Expand to the size of: Triple widget

Assigned skills: Select skills or leave blank to assign to all skills

URL:   
▶ Create advanced widget using [LivePerson integration SDK](#)   
https://lpcrm.fs.liveperson.com/?apiKey=YOUR\_APP\_KEY&debug=true   
Add Visit Info parameters

Advanced settings for LivePerson integration SDK ▲   
In case widget didn't load, display the following link:   
\_\_\_\_\_

Manager view mode Cancel Save

6. Enter the following URL
  - [https://lpcrm.fs.liveperson.com/?apiKey=YOUR\\_APP\\_KEY&debug=true](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.

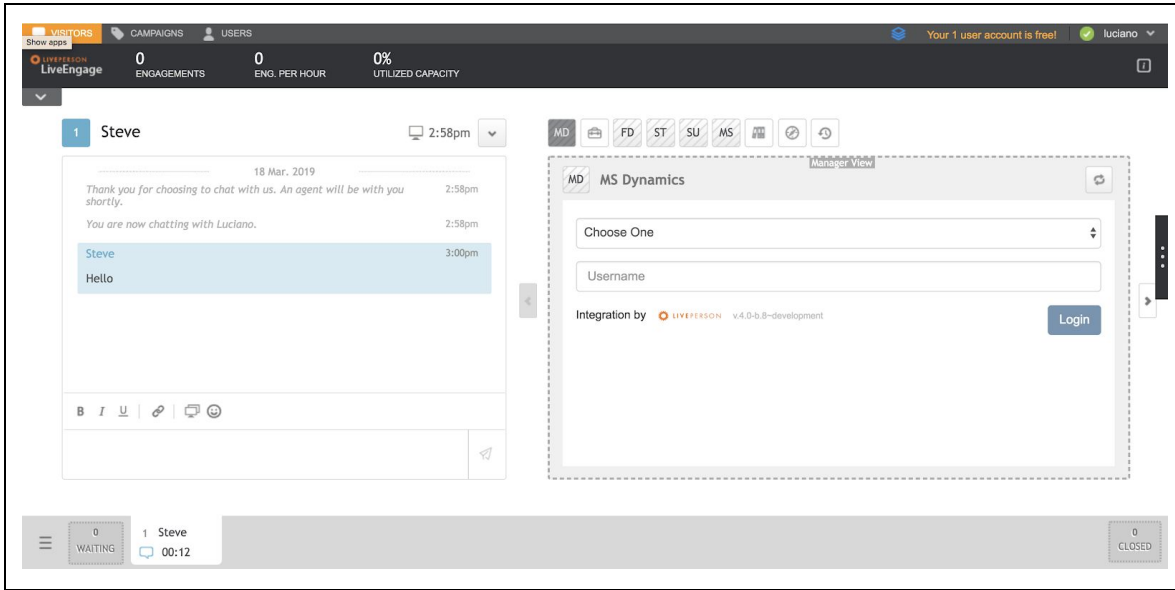
### Overview

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

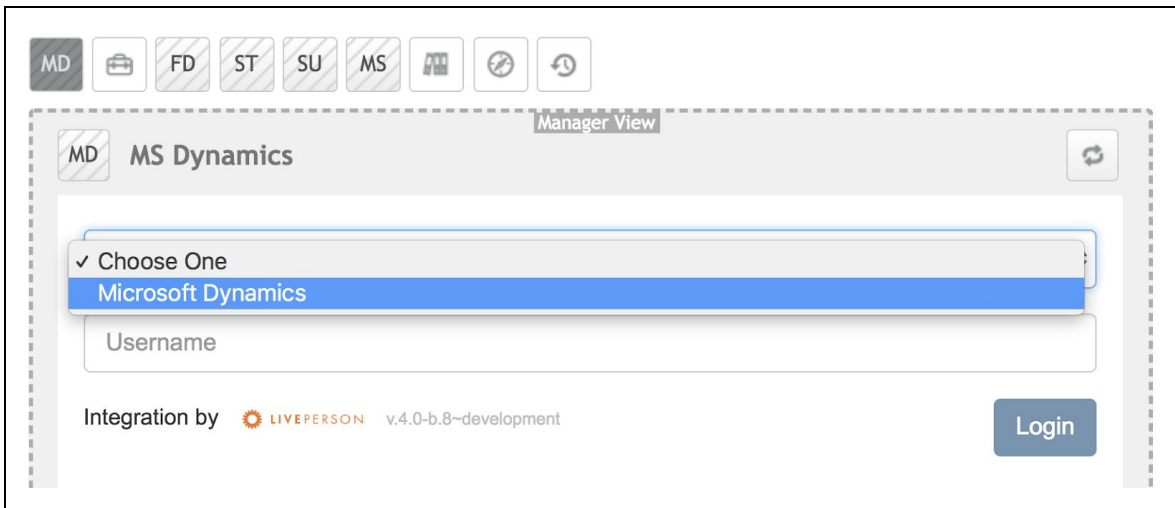
To start working on the new widget, accept a chat, click on "MS Dynamics" widget, login and you can view Contacts and Leads and create Accounts, Leads, Contacts and Cases directly in LiveEngage.



## Login Widget

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

Select registered CRM:



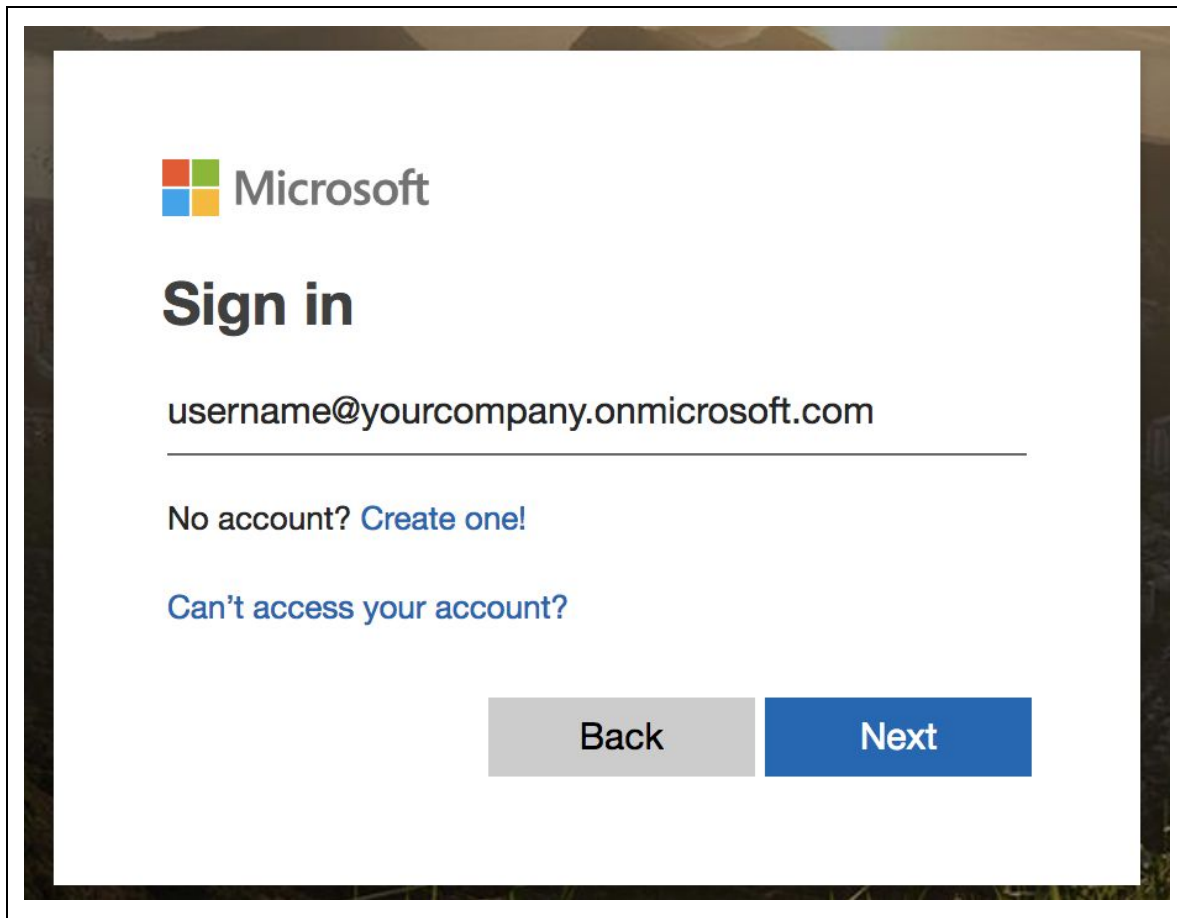
Enter your credentials (Username and Password) and click on "Login" button:

The screenshot shows the 'MS Dynamics' login interface within a 'Manager View' window. At the top, there is a navigation bar with icons for MD, FD, ST, SU, MS, and other system functions. The main content area features a dropdown menu currently set to 'Microsoft Dynamics', a text input field for 'Username', and a 'Login' button. Below the input fields, it states 'Integration by LIVEPERSON v.4.0-b.8-development'.

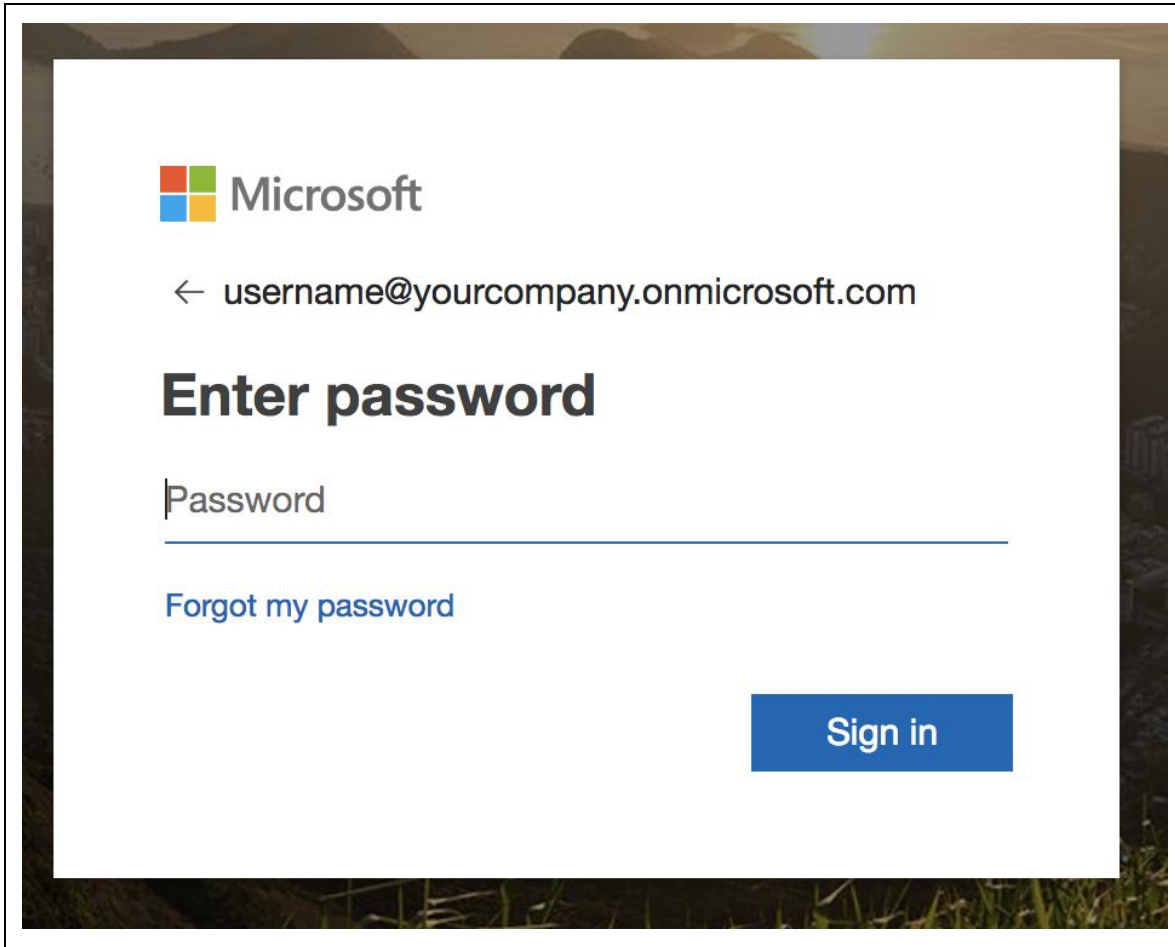
Click on "Authorize me" button:

The screenshot shows the 'MS Dynamics' authorization screen. A blue progress bar at the top indicates 'Authorizing ...'. Below the progress bar, the text reads 'Please allow pop-up, then click below to authorize'. At the bottom of the screen, there is a prominent blue 'Authorize me' button.

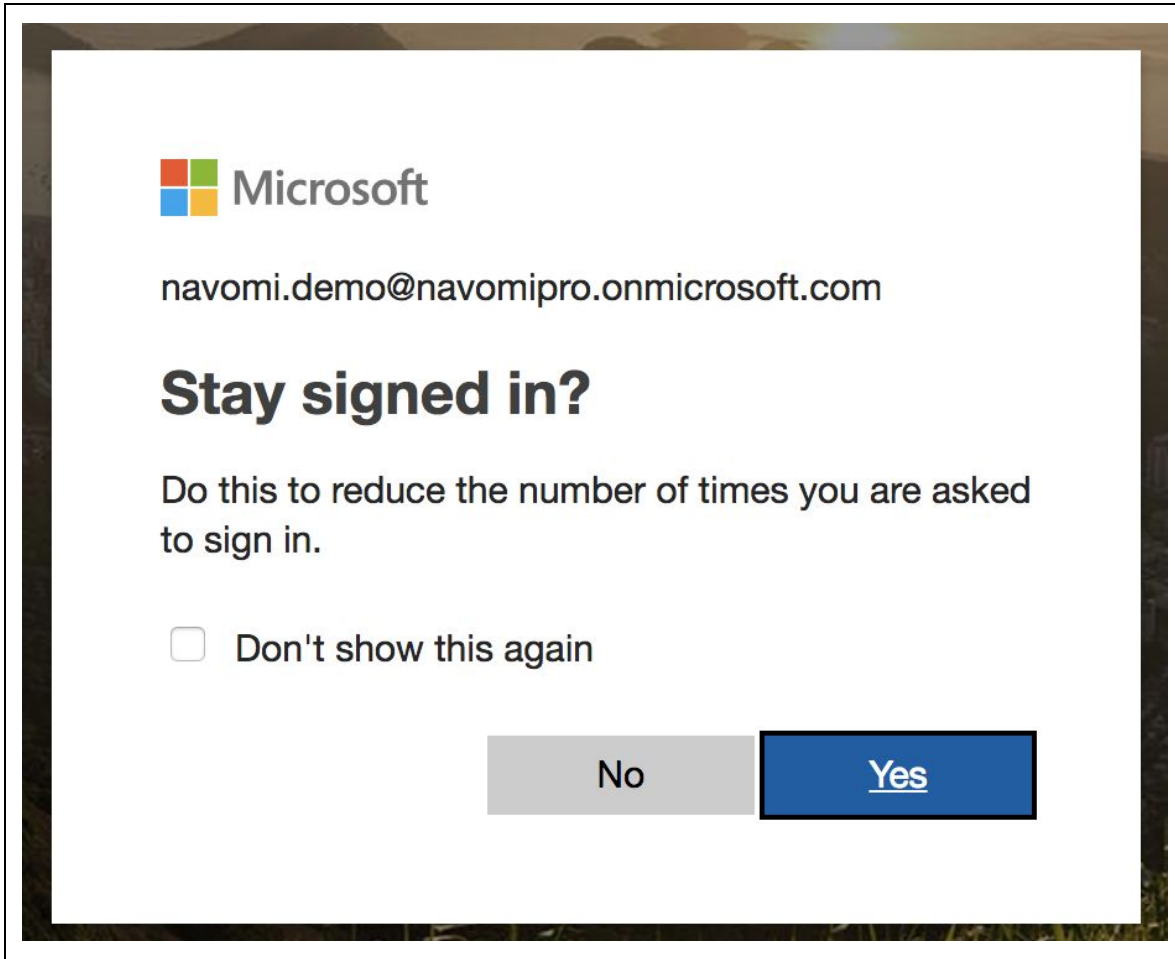
A new window will open for the CRM login. Be sure to enter valid credentials in the requested fields. Insert your MS Dynamics username and click on "Next" button:



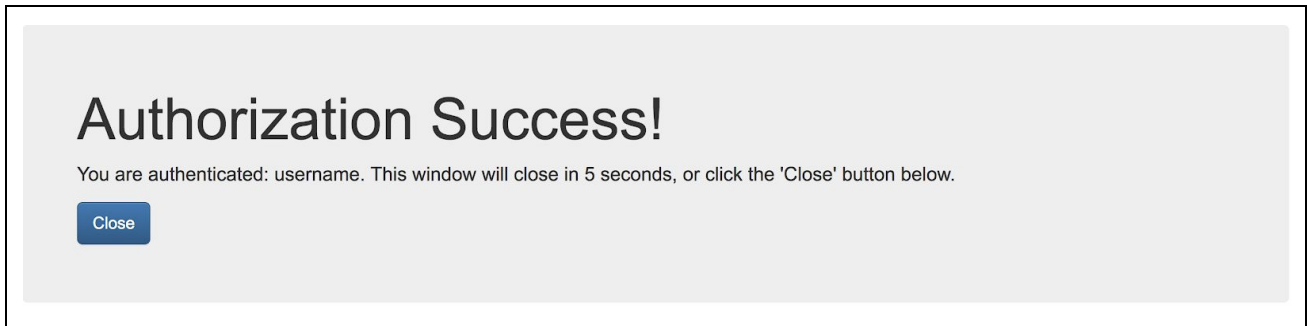
Now insert your MS Dynamics password and click on "Next" button:



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



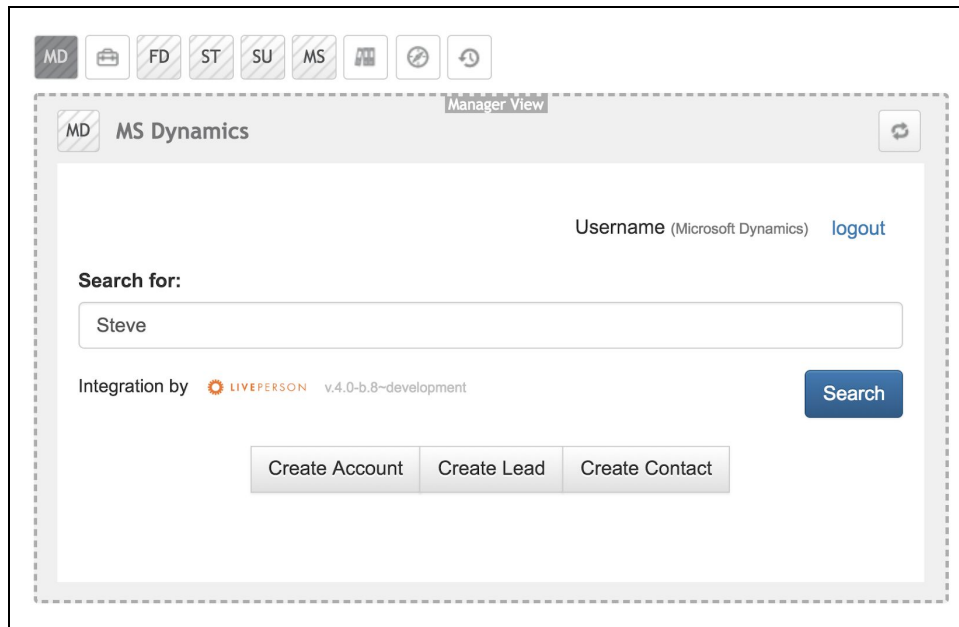
If the message has some type of error, follow these procedures:

- 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:



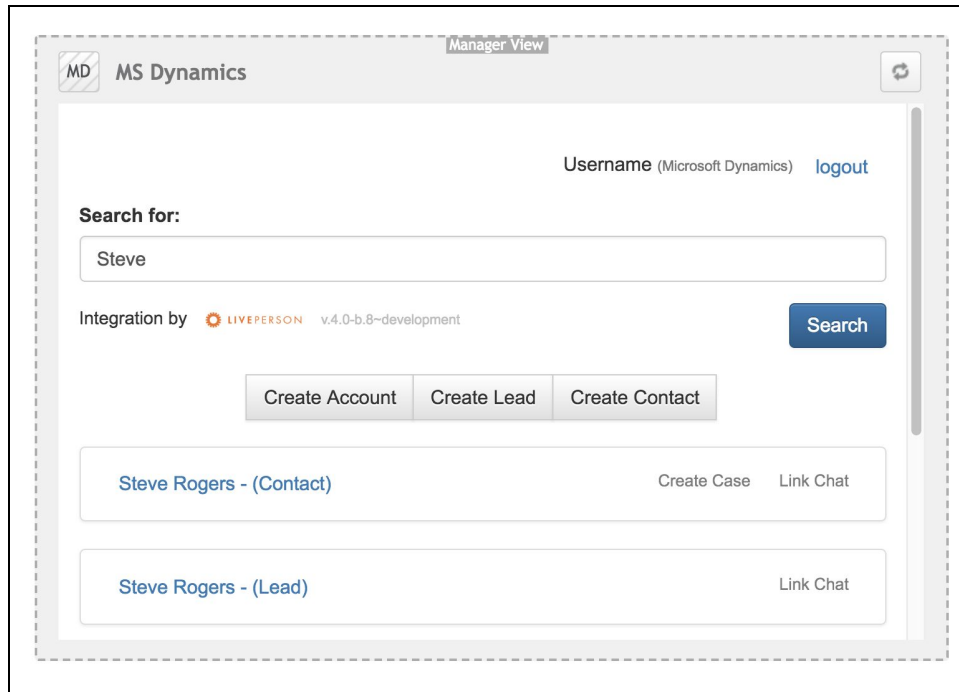
## Custom Functionalities

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.



# LiveEngage CRM Customer Admin Panel

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ProfileWidget ConfigLE Attributes ConfigSupportLE Widget Info

## Dynamics Config

- Create Account
  - Auto Link Chat(Account)
- Create Case (only for Account and Contacts) - beta
- Create Contact
  - Auto Link Chat(Contact)
- Create Lead
  - Auto Link Chat(Lead)
  - Skip Info Prompt
- Auto Create Lead
- Exclude Chat Transcript (only Chat Session ID will be mentioned)
  
- Disable Search


**Select a Search Field**

Email

Name

Phone

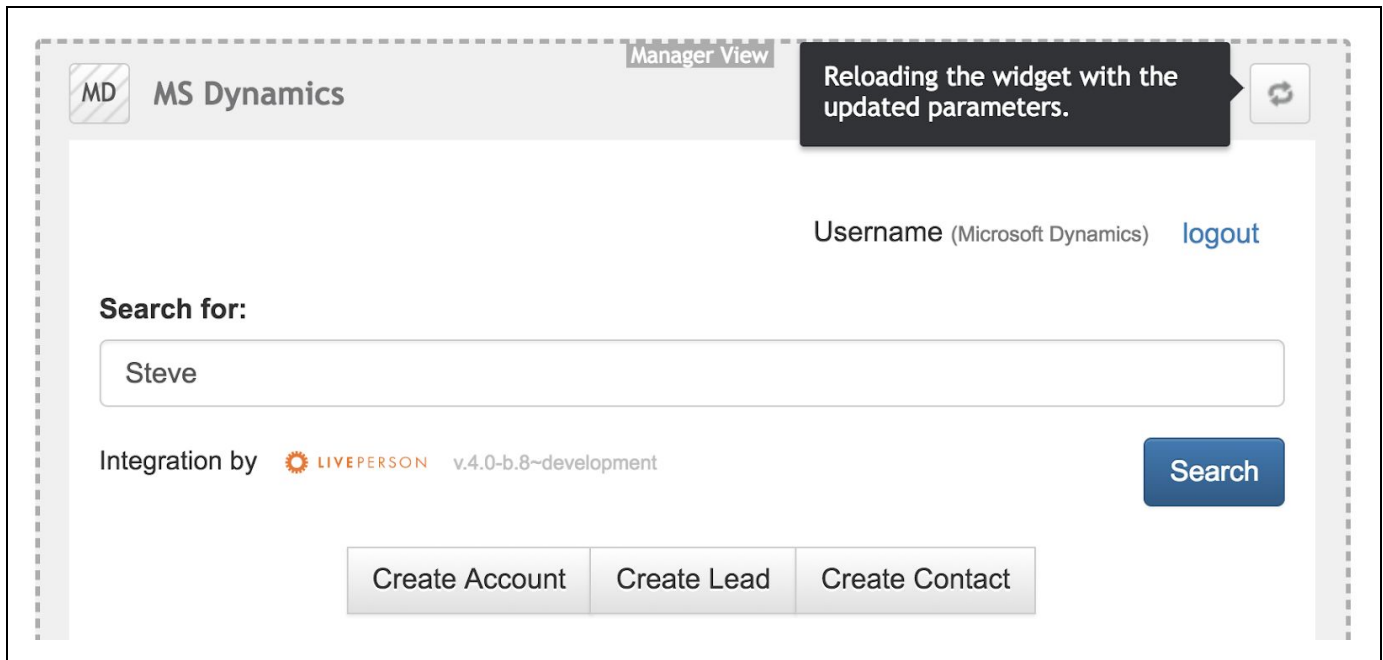
Use **Name** field to search records.

- Add Custom Survey Questions 

Save Config

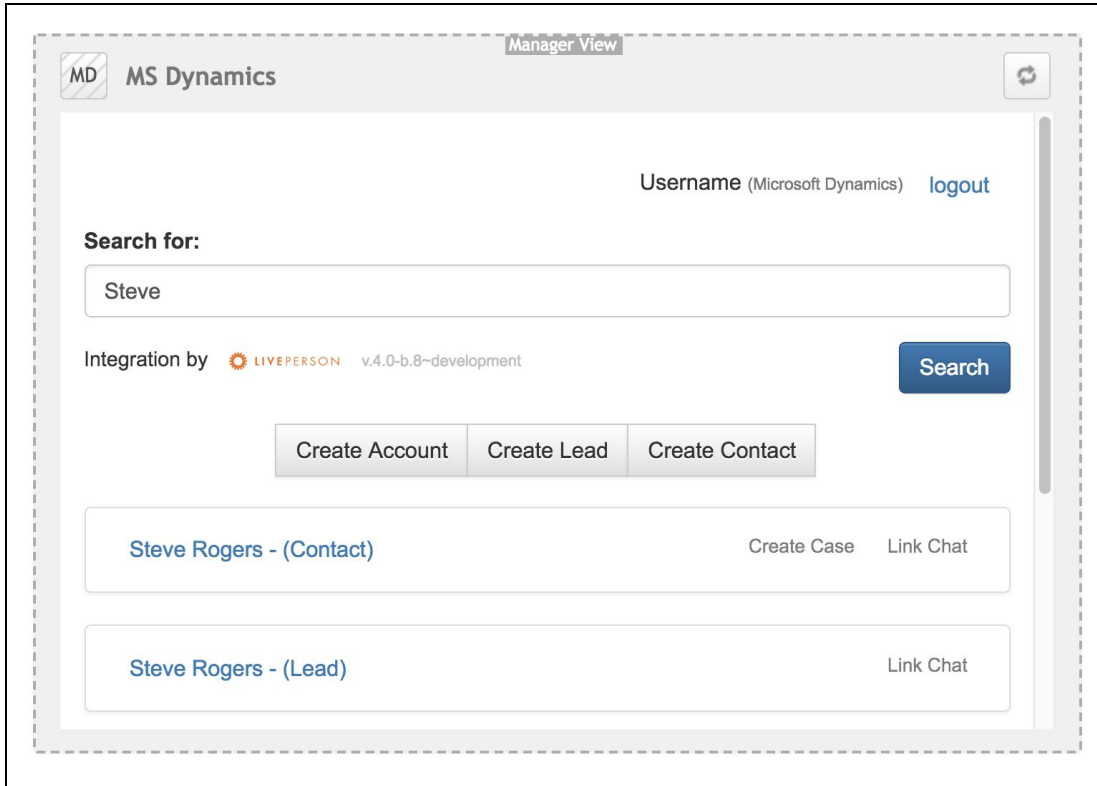
For new settings to take effect, you need to reload the widget in Live Engage. To do this, just click on the icon at the top of the widget on the right:



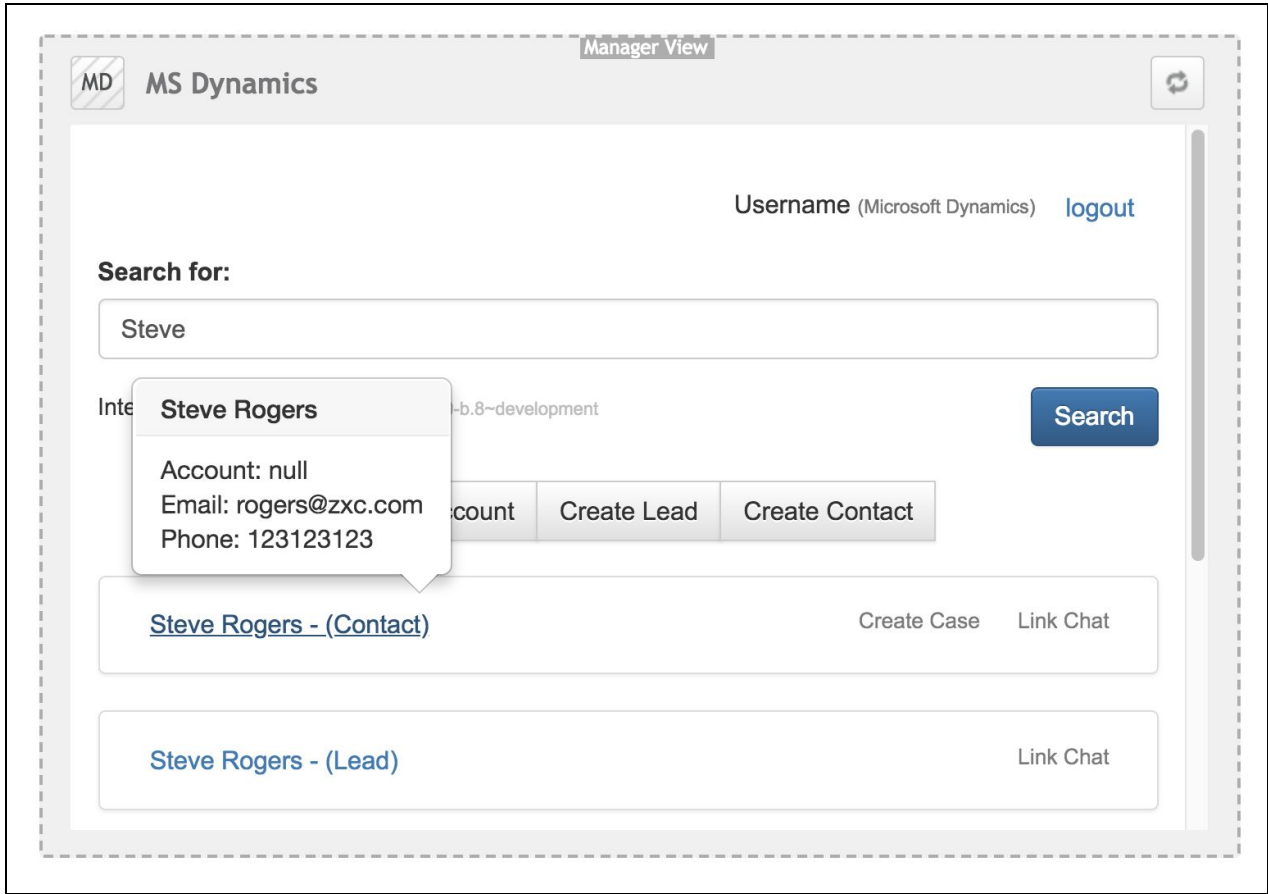


## View Records

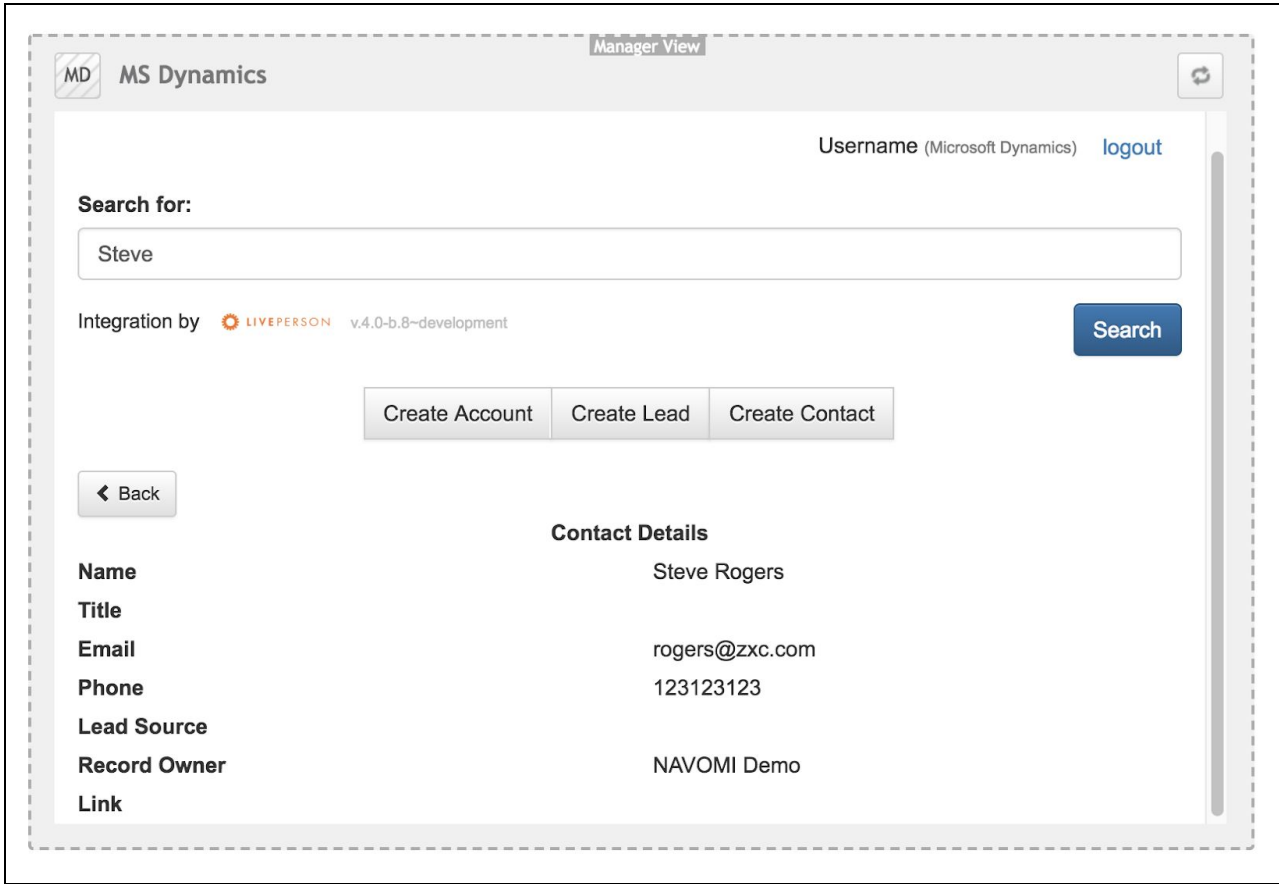
Here is a sample listing of search records. In this case, the search is configured with the filter by NAME, and all data that has the search field value as part of the data are listed. Beside the value of each data, in parentheses one can observe the type (CONTACT and LEAD).



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



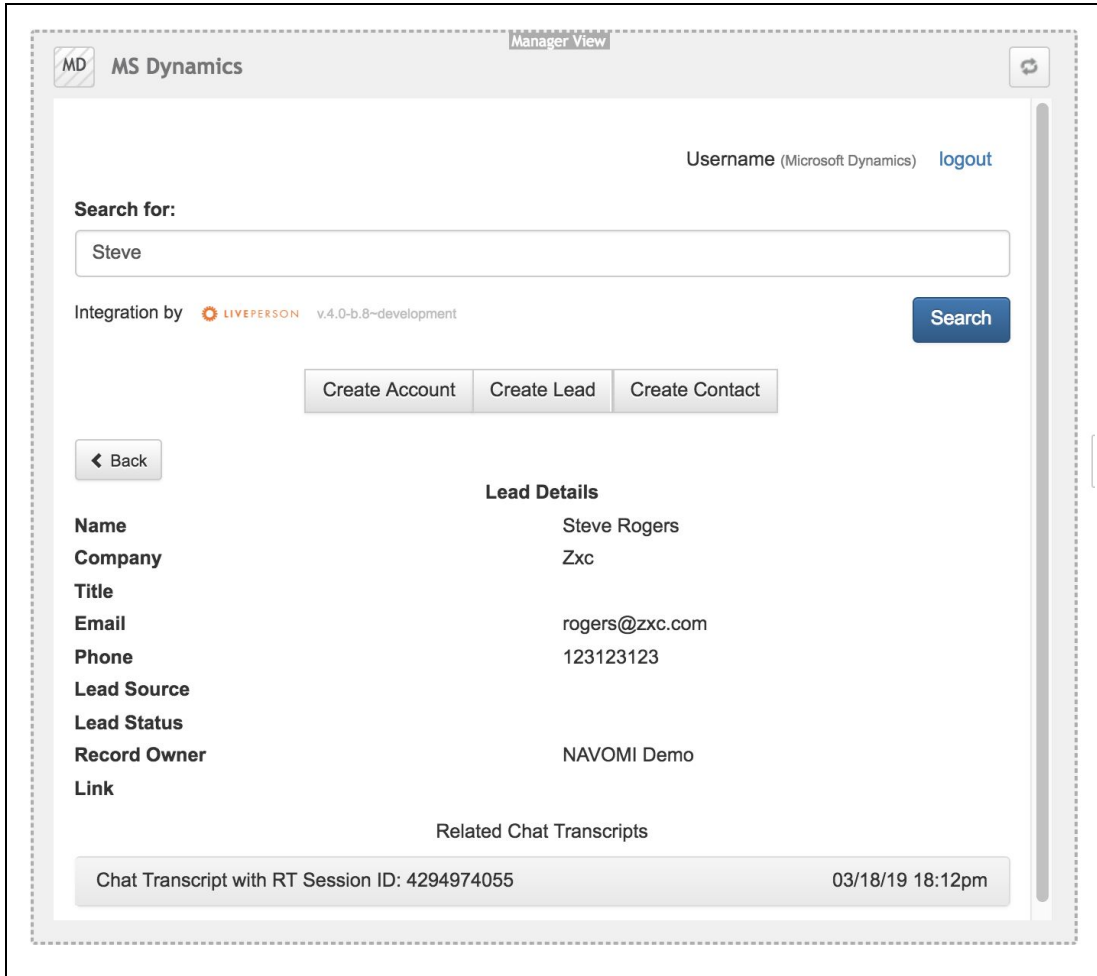
Clicking will display the item details. Here is an example of CONTACT:



## 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:

[← Back](#)

**Lead Details**

<b>Name</b>	Steve Rogers
<b>Company</b>	Zxc
<b>Title</b>	
<b>Email</b>	rogers@zxc.com
<b>Phone</b>	123123123
<b>Lead Source</b>	
<b>Lead Status</b>	
<b>Record Owner</b>	NAVOMI Demo
<b>Link</b>	

Related Chat Transcripts

[Chat Transcript with RT Session ID: 4294974055](#) 03/18/19 18:12pm

RT Session ID: 4294974055  
LE Attributes:  
false  
Visitor Name: Steve

Transcript:  
info: Thank you for choosing to chat with us. An agent will be with you shortly.  
info: You are now chatting with Luciano.  
Steve: Hello  
Luciano: Hello, how may I assist you?  
info: Thank you for chatting with us.

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:



The screenshot displays the Microsoft Dynamics 365 interface for a lead record. The top navigation bar shows 'Dynamics 365 Sales Leads > Steve Rogers'. Below this, a yellow banner provides information about 'Apps for Dynamics 365'. The main header area includes a 'LEAD' dropdown, the name 'Steve Rogers', and fields for 'Lead Source', 'Rating' (Warm), 'Status' (New), and 'Owner' (NAVOMI Demo). A process flow is visible with stages: 'Qualify (Active for 2 hours)', 'Develop', 'Propose', and 'Close'. Below the process flow, there are several fields with 'click to enter' or 'mark complete' links, such as 'Existing Contact?', 'Existing Account?', 'Purchase Timeframe', 'Estimated Budget', 'Purchase Process', 'Identify Decision M...', and 'Capture Summary'. A 'Lead to Opportunity Sales Process (Active for 2 hours)' is also shown with a 'Next Stage' button. The 'Summary' section is divided into 'Contact' (with fields for Name, Job Title, Business Phone, Mobile Phone, and Email), 'POSTS', 'ASSISTANT', 'ACTIVITIES', 'NOTES' (containing a chat transcript), and 'Stakeholders' (showing 'No stakeholders found.').

*This is Out of Box. Custom storage of Transcript are subject to be discussed*

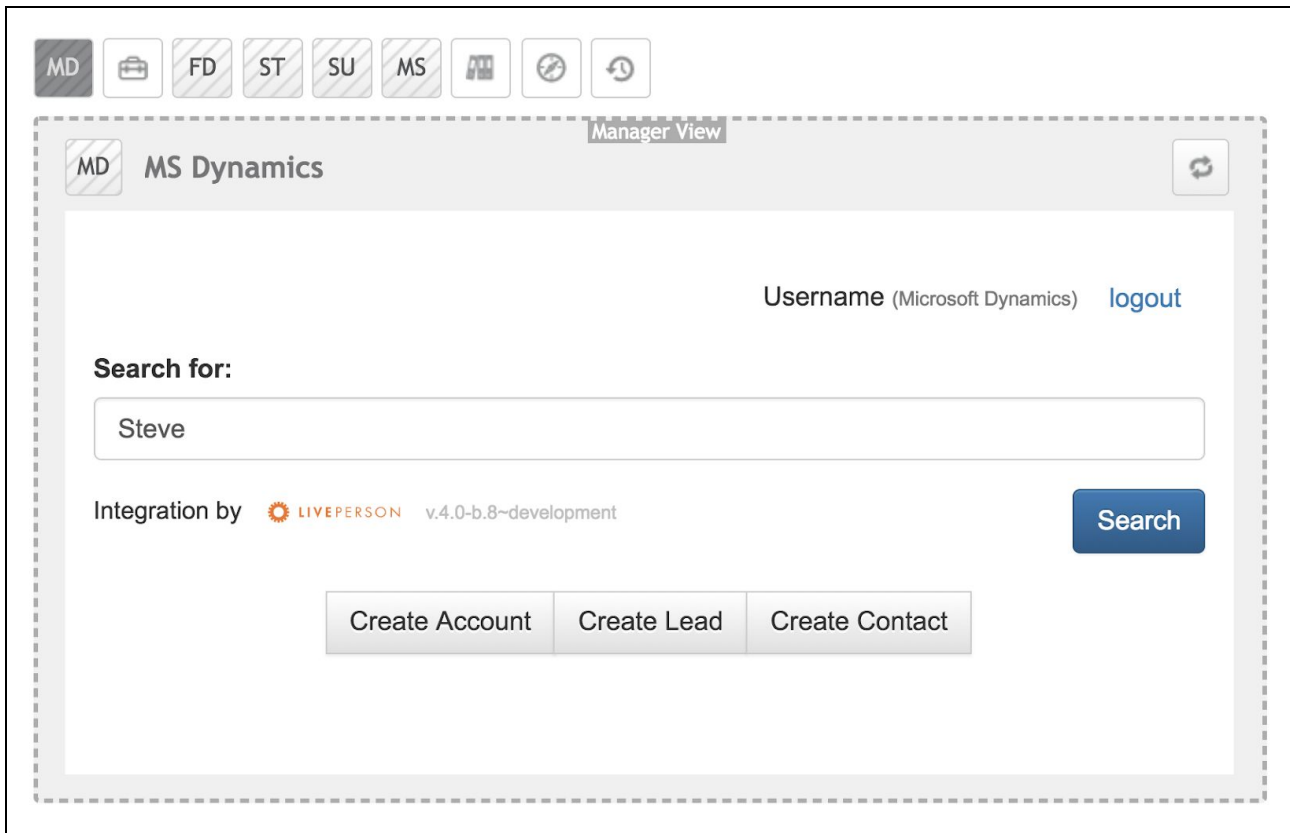
## Create New Records

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.

Create Account Create Lead Create Contact

### Quick Create Contact

**First Name \***

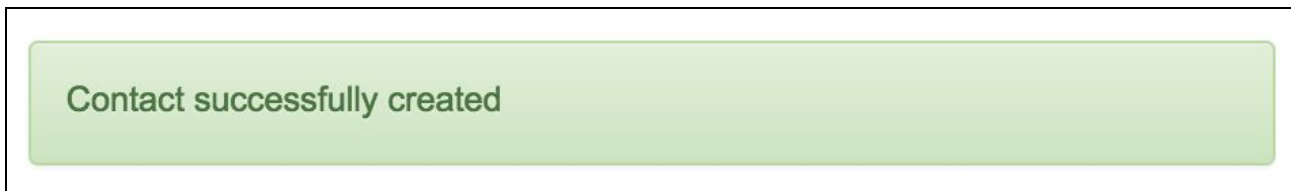
**Last Name \***

**Email \***

**Phone**

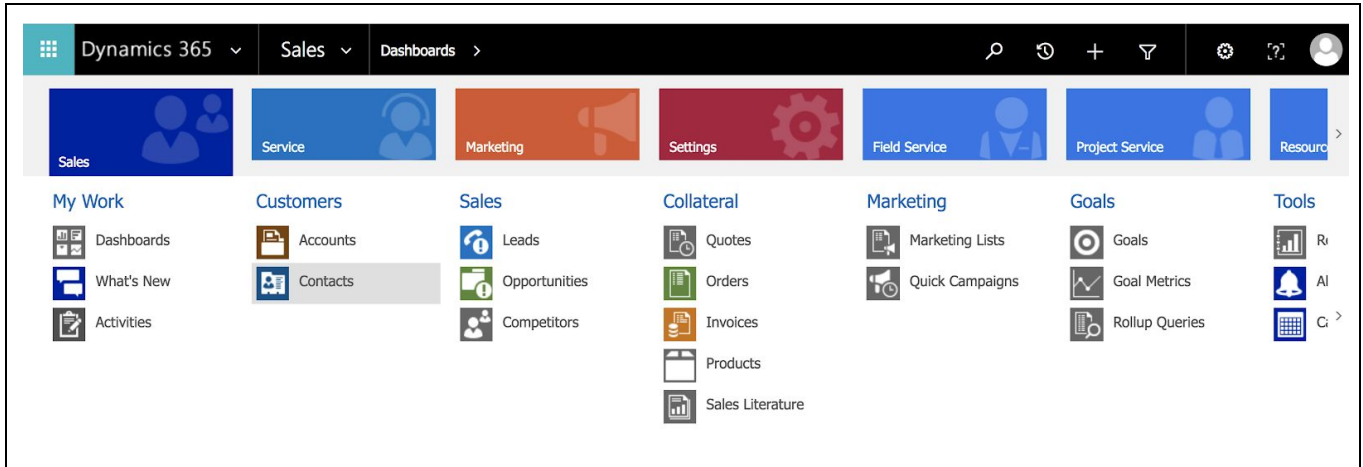
Cancel Create

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

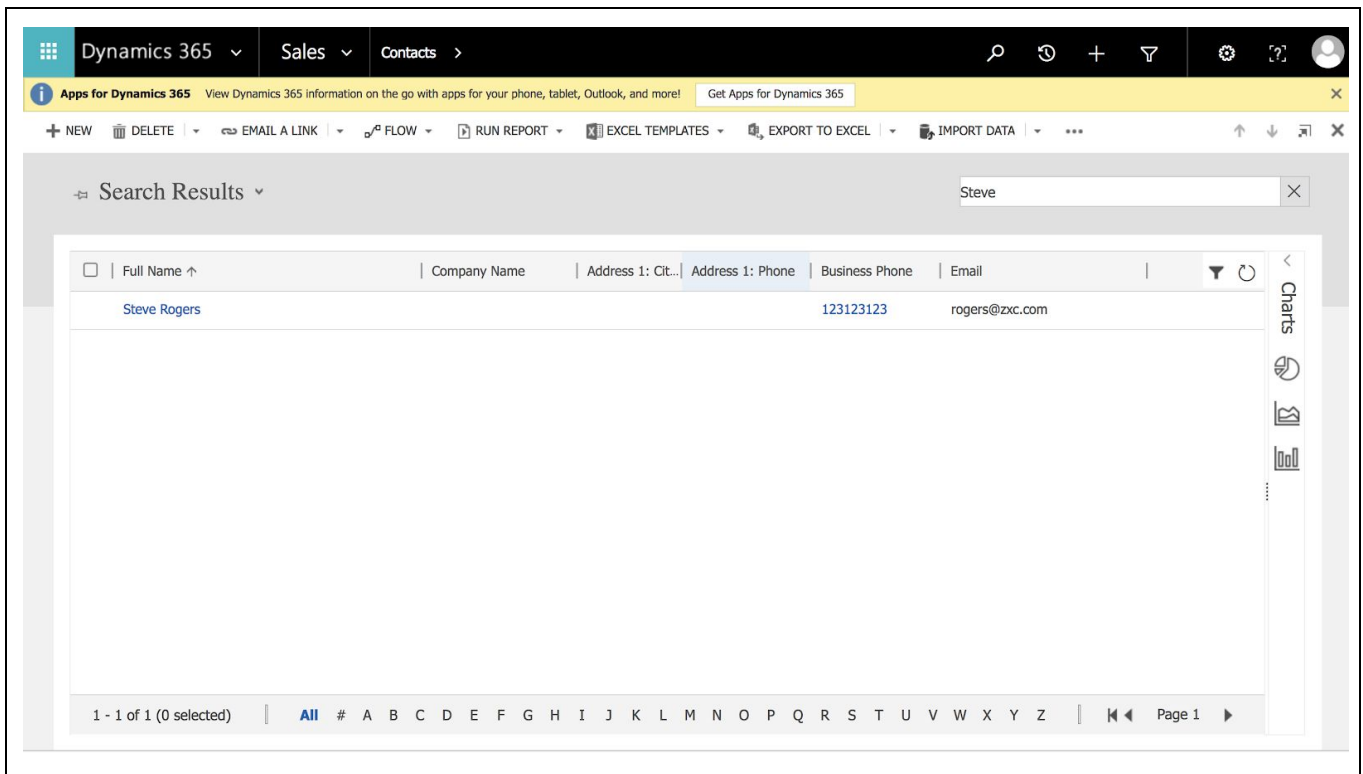


Note where this record will be stored in CRM system itself. Go to Contacts using the top menu:

## LE - MS DYNAMICS Integration Guide

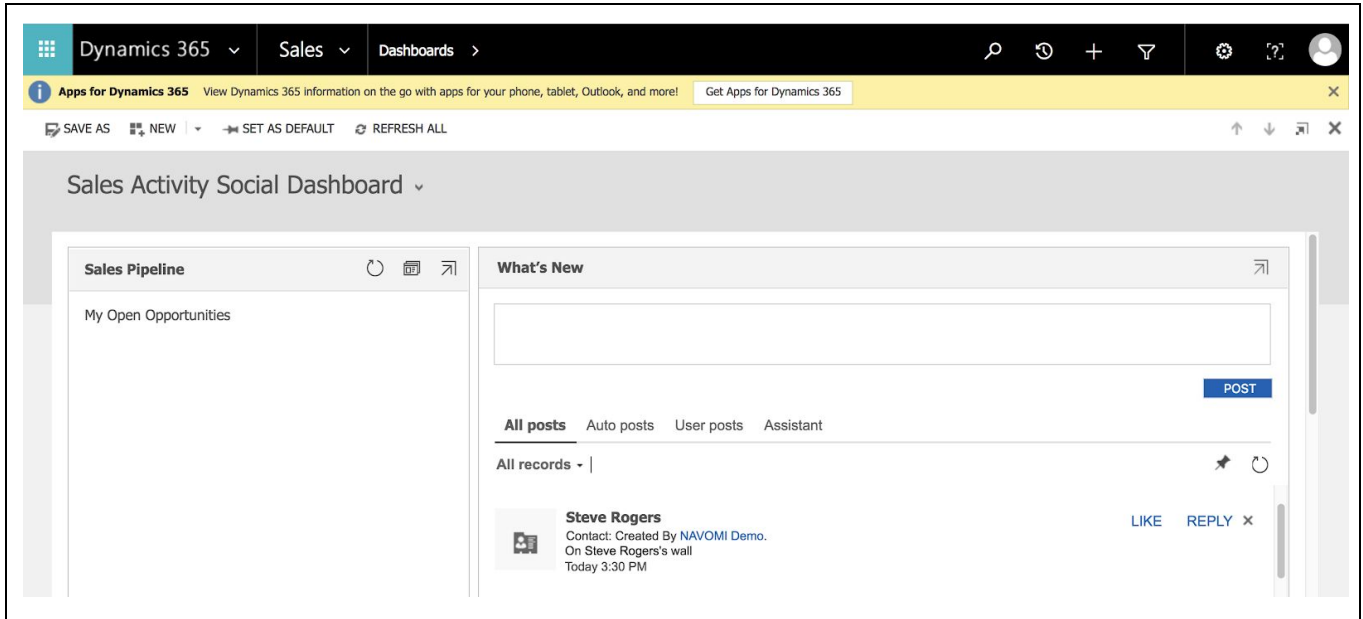


And use the search box at the top to find the record you want and click on it:

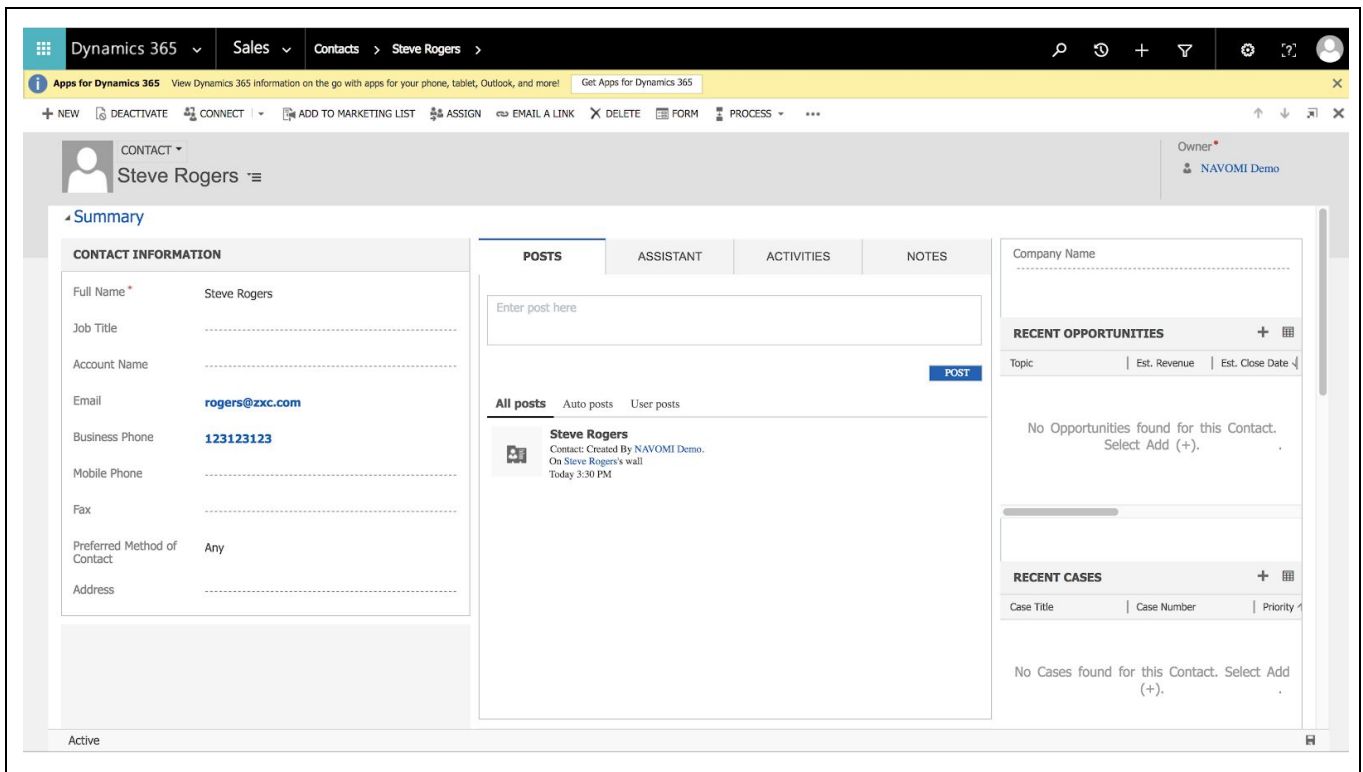


Or access directly the last record created in the Dashboard:

# LE - MS DYNAMICS Integration Guide

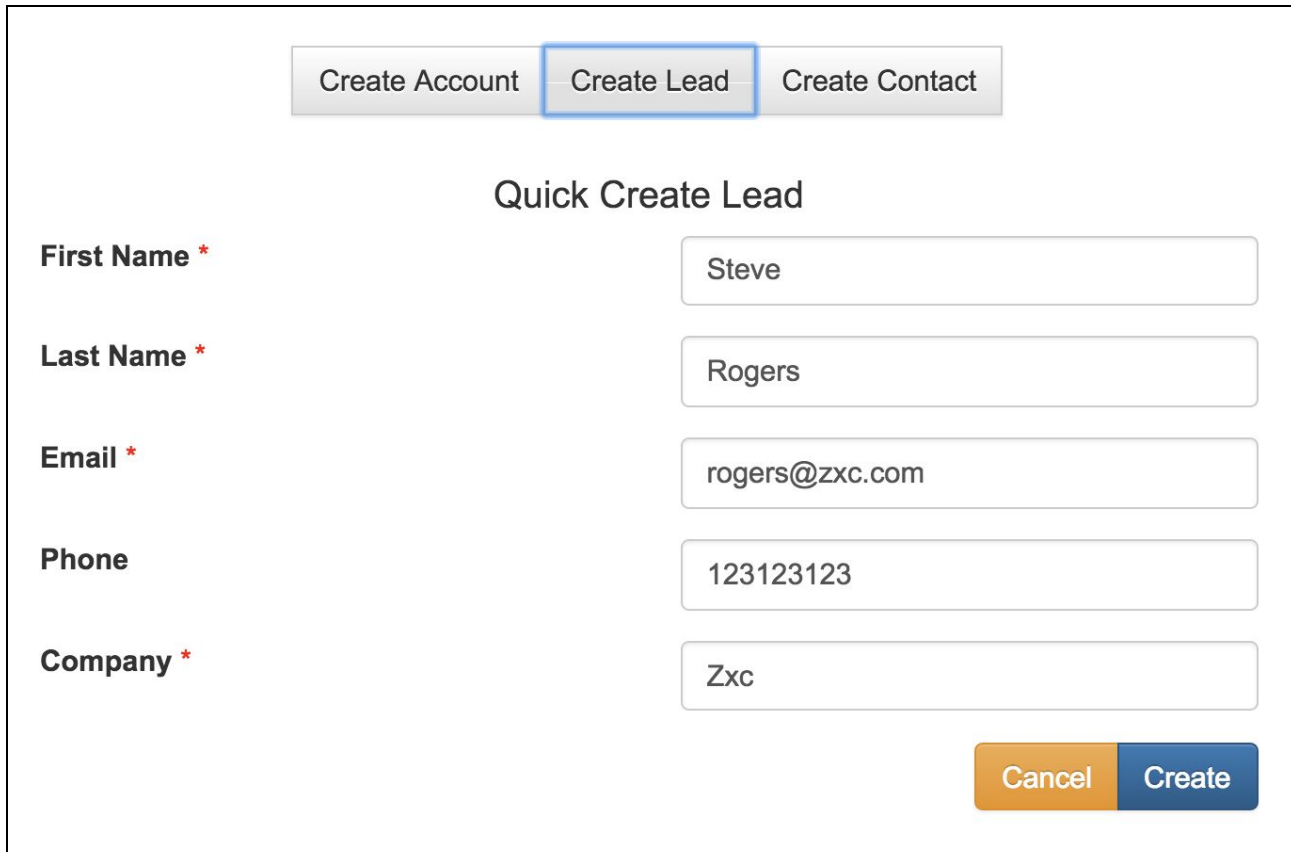


And when you click the last record, the window with the detailed data opens:



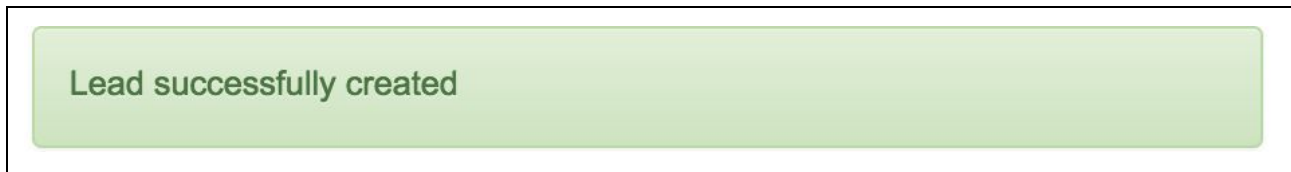
## Create Lead

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.



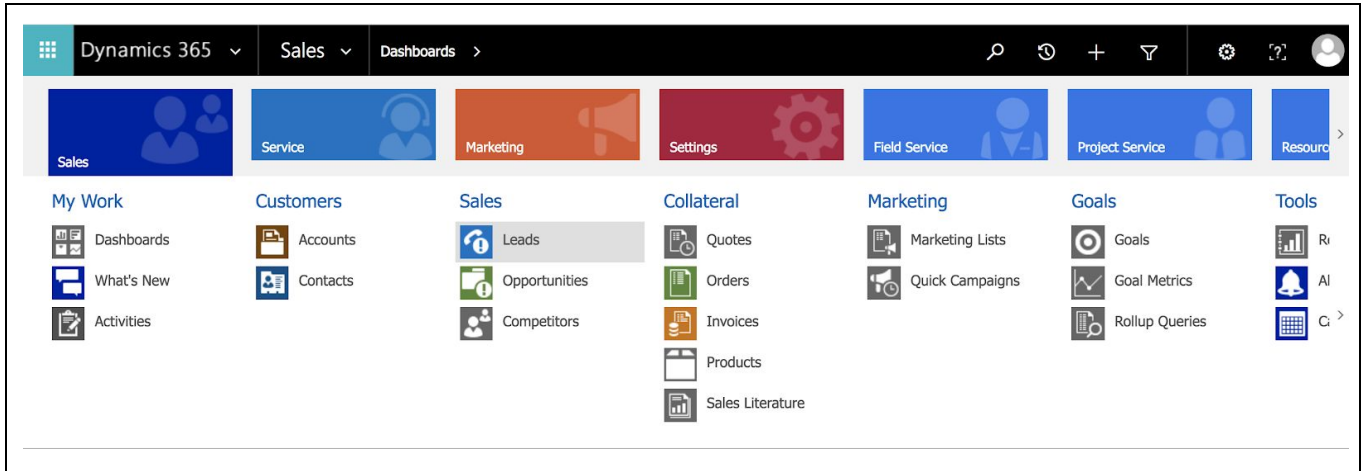
The screenshot shows a user interface for creating a lead. At the top, there are three buttons: "Create Account", "Create Lead" (which is highlighted with a blue border), and "Create Contact". Below these buttons is the title "Quick Create Lead". The form consists of five input fields, each with a label and a red asterisk indicating it is required: "First Name" (containing "Steve"), "Last Name" (containing "Rogers"), "Email" (containing "rogers@zxc.com"), "Phone" (containing "123123123"), and "Company" (containing "Zxc"). At the bottom right of the form, there are two buttons: "Cancel" (orange) and "Create" (blue).

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

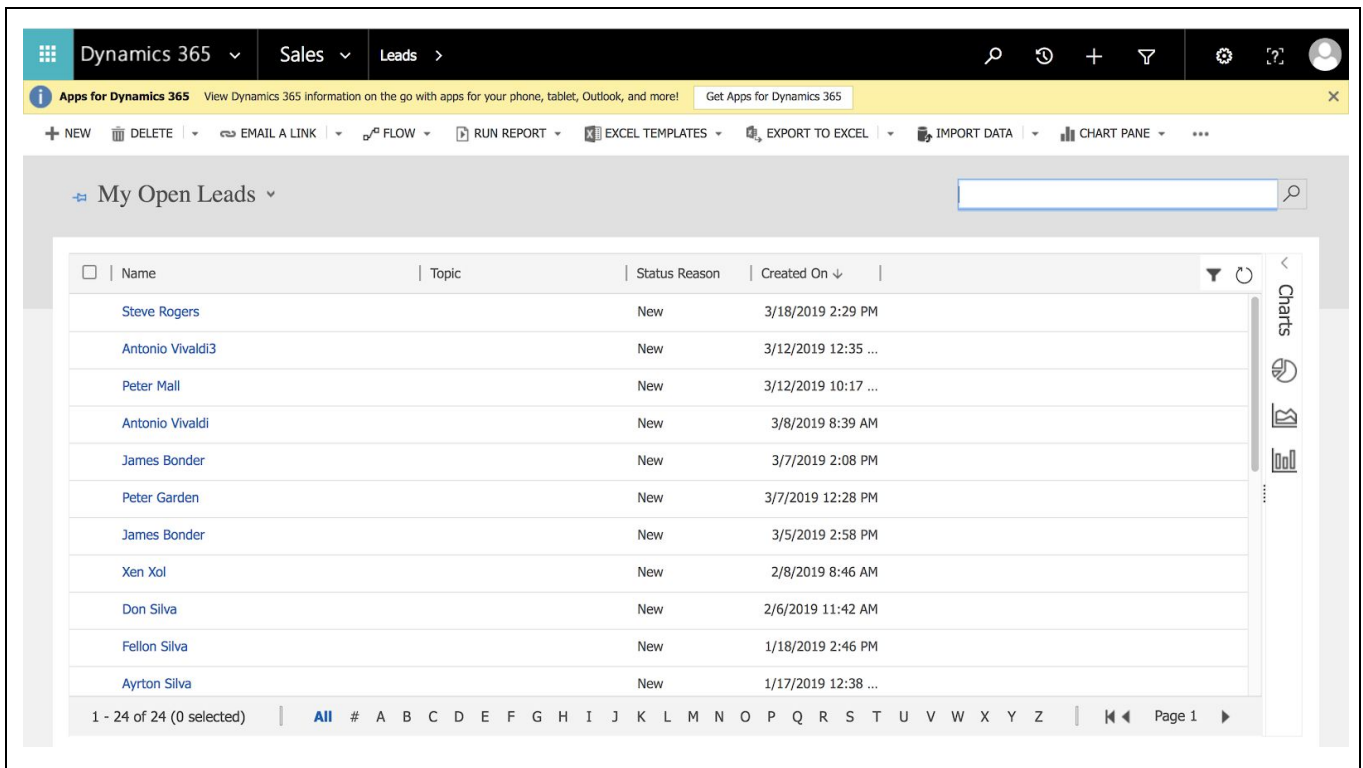


Note where this record will be stored in CRM system itself. Go to Leads using the top menu:

## LE - MS DYNAMICS Integration Guide

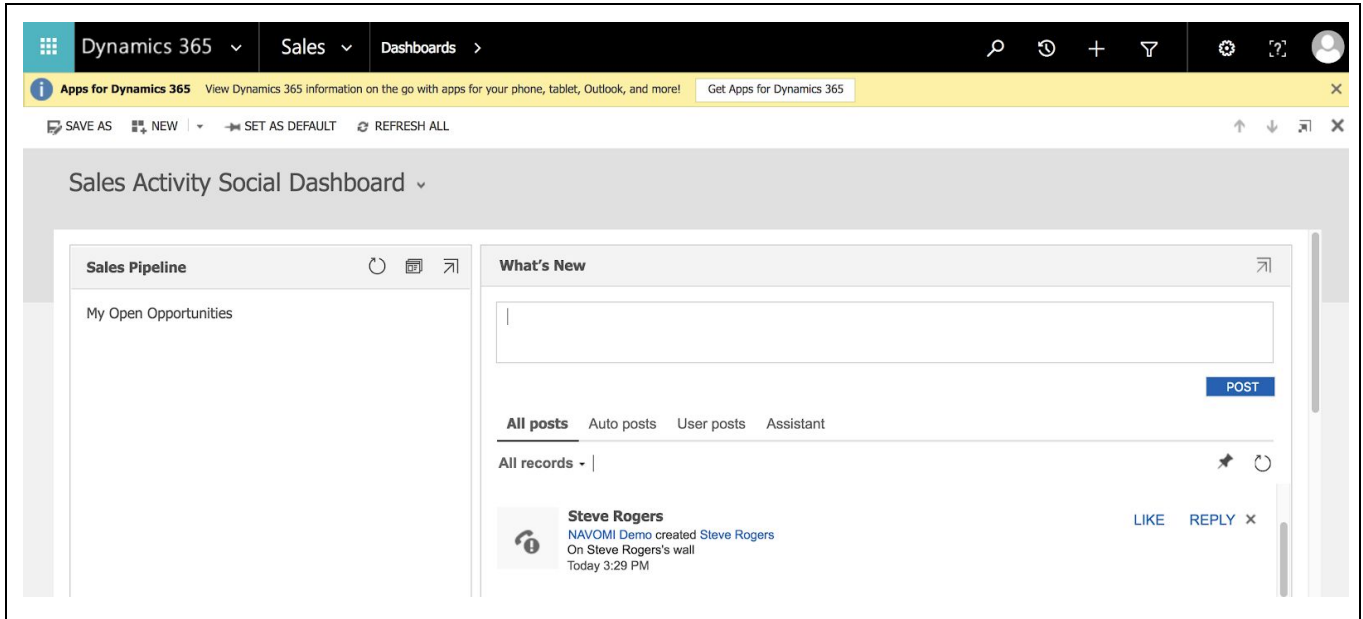


And use the search box at the top to find the record you want and click on it:

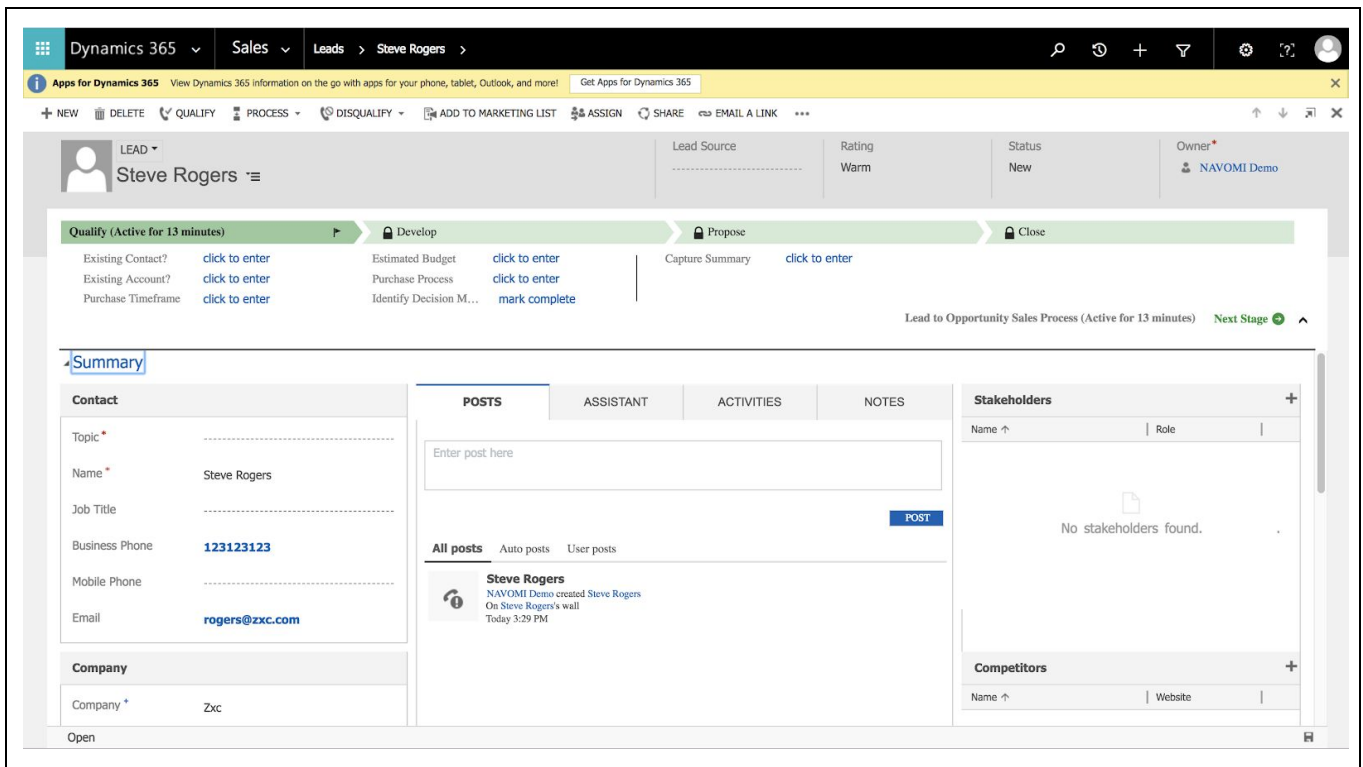


Or access directly the last record created in the Dashboard::

# LE - MS DYNAMICS Integration Guide



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.

Create Account Create Lead Create Contact

### Quick Create Account

**Account Name \***

**Email \***

**Phone**

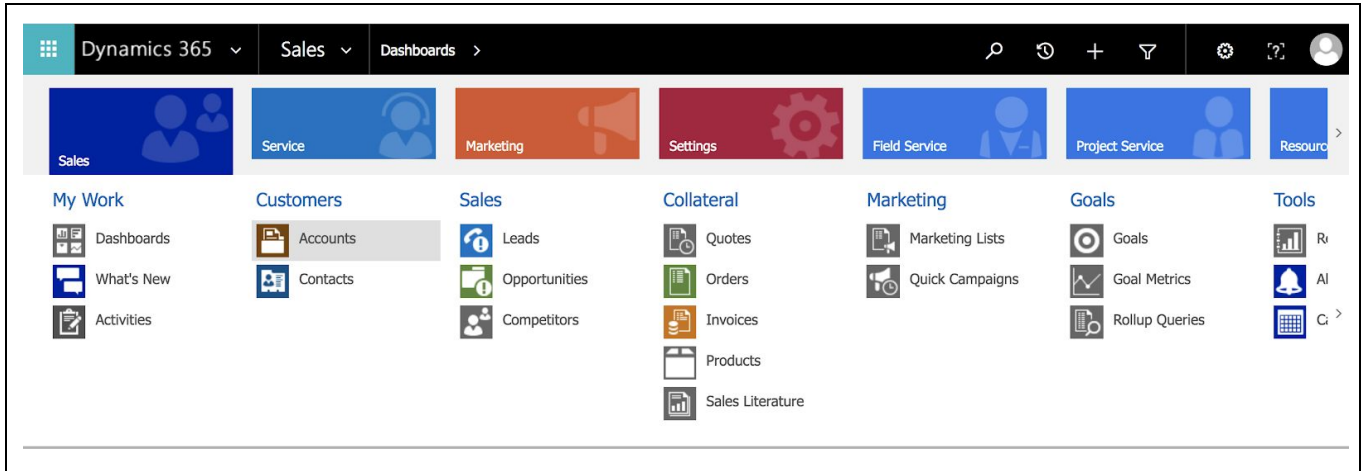
Cancel Create

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

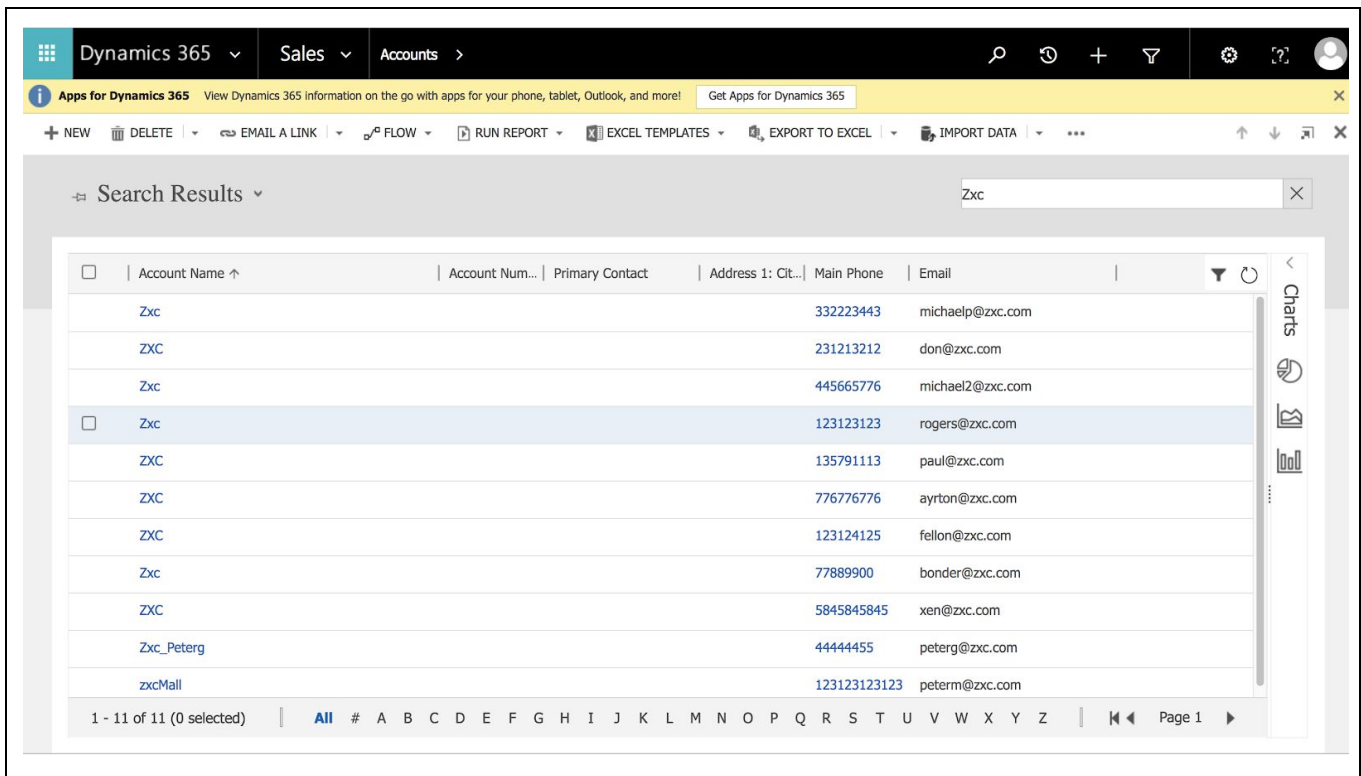
**Account successfully created**

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



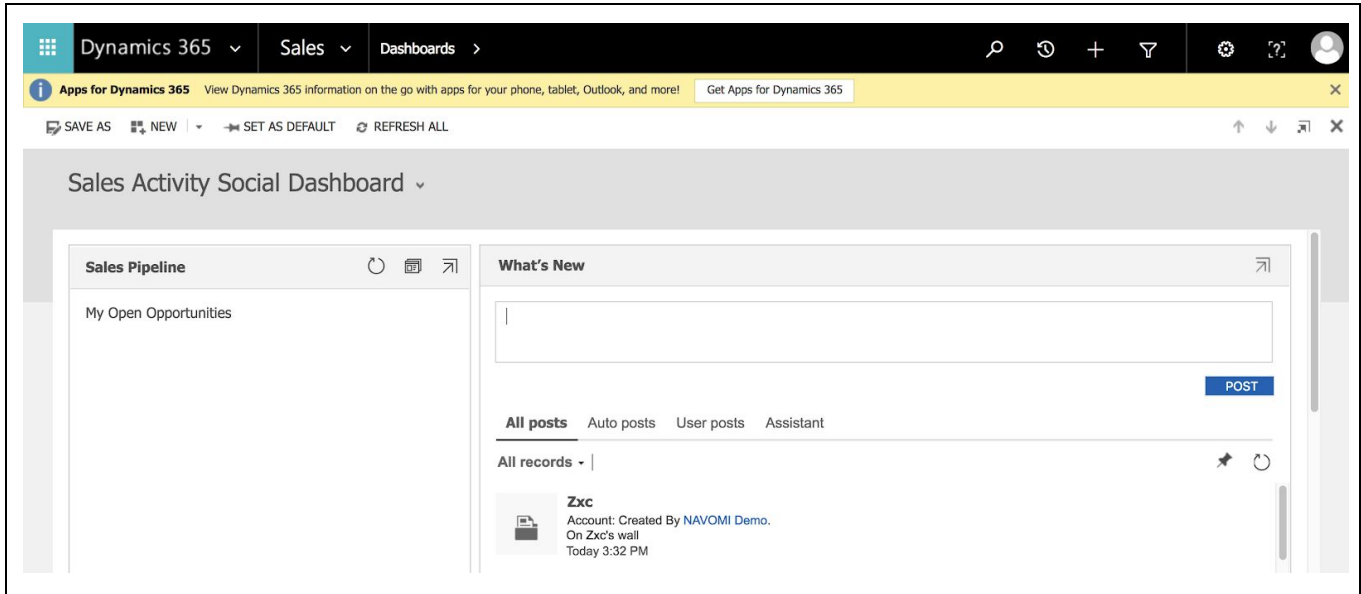


And use the search box at the top to find the record you want and click on it:

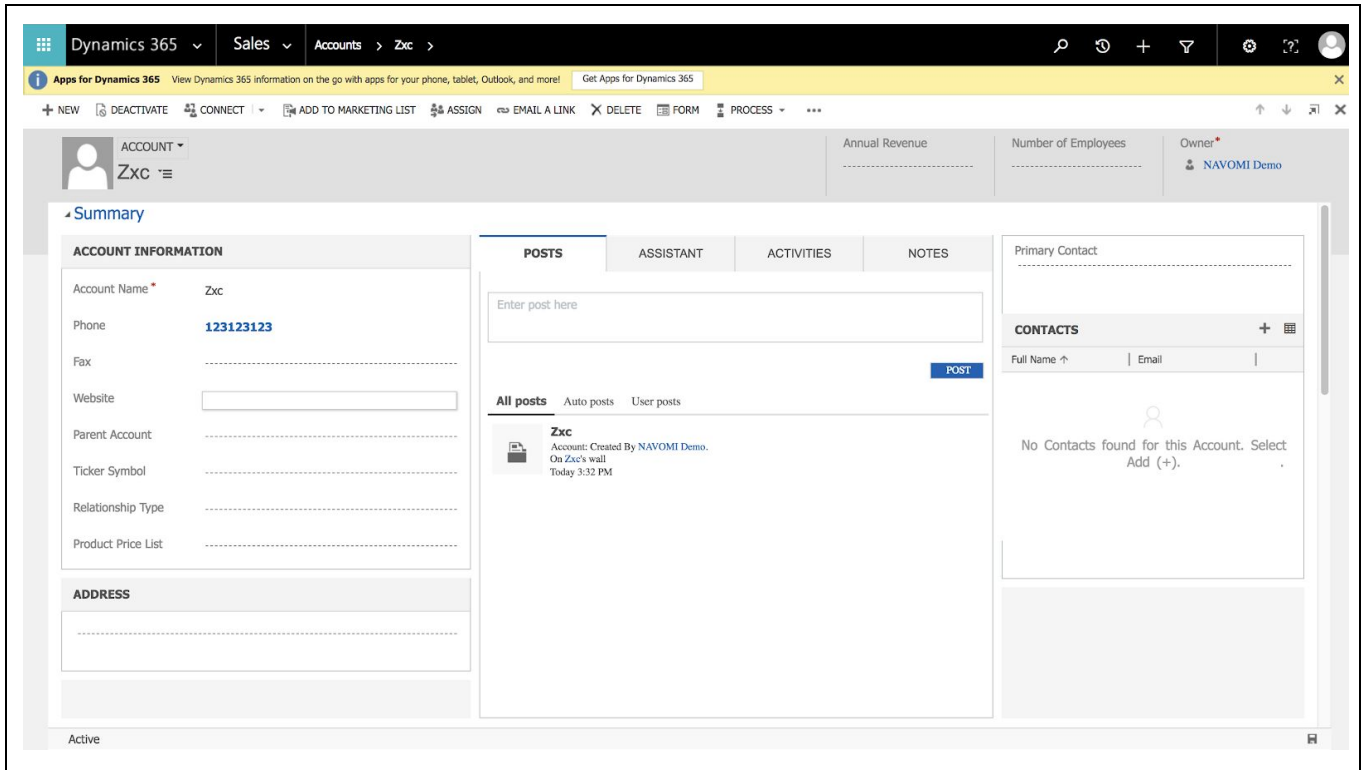


Or access directly the last record created in the Dashboard:



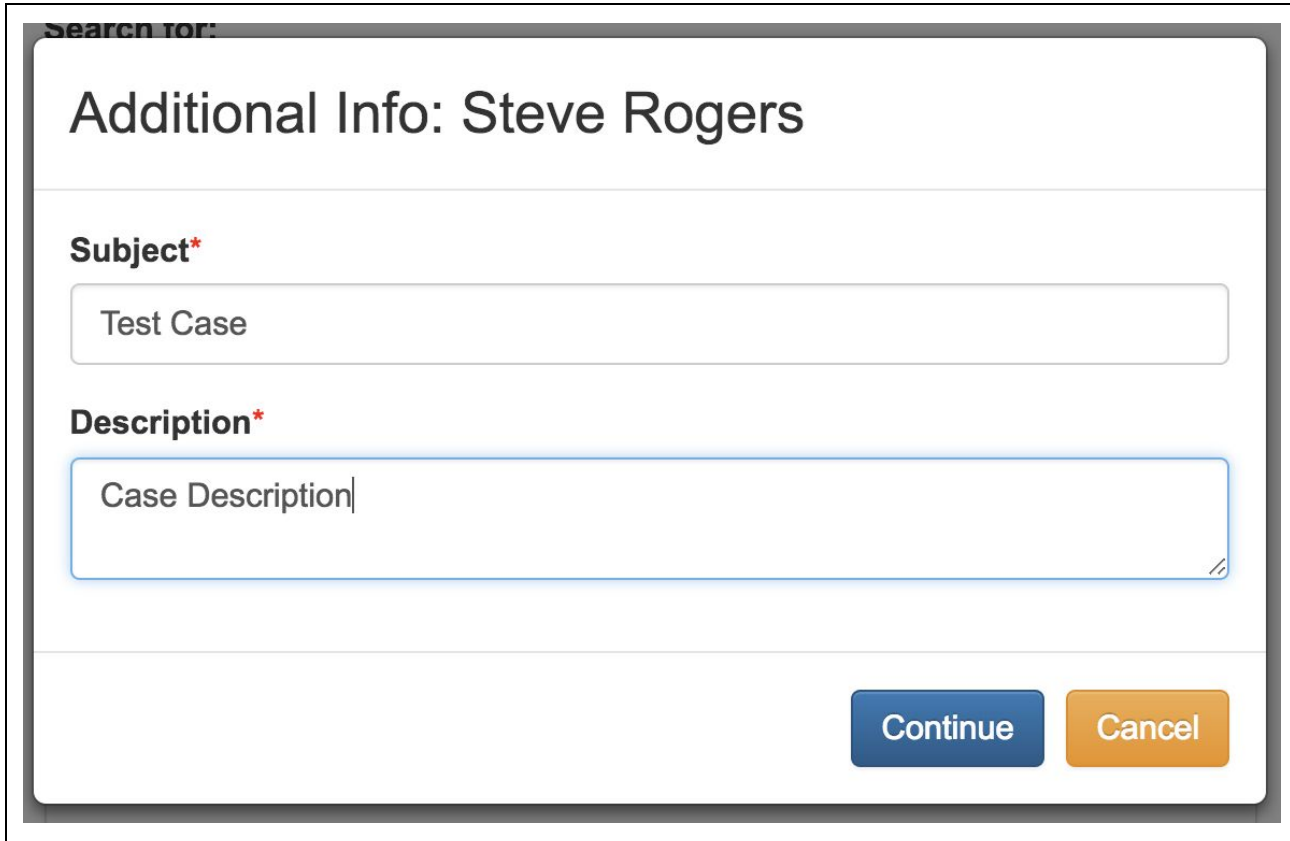


And when you click the last record, the window with the detailed data opens:



## Create Case

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



Search for:

### Additional Info: Steve Rogers

**Subject\***

**Description\***

Continue Cancel

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

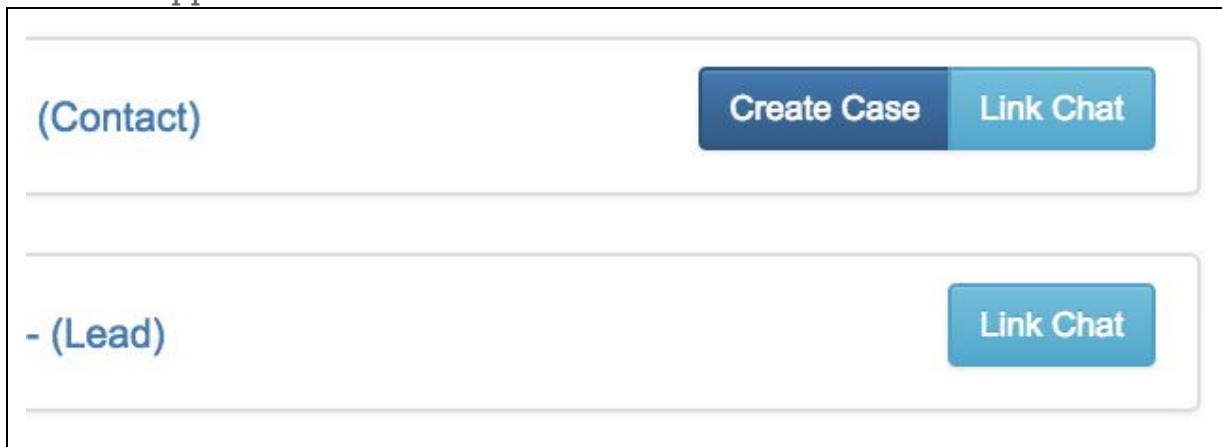


**Note!** "Create Case" can only be done when the chat session has ended. The "Create Case" button is disabled throughout an active engagement.

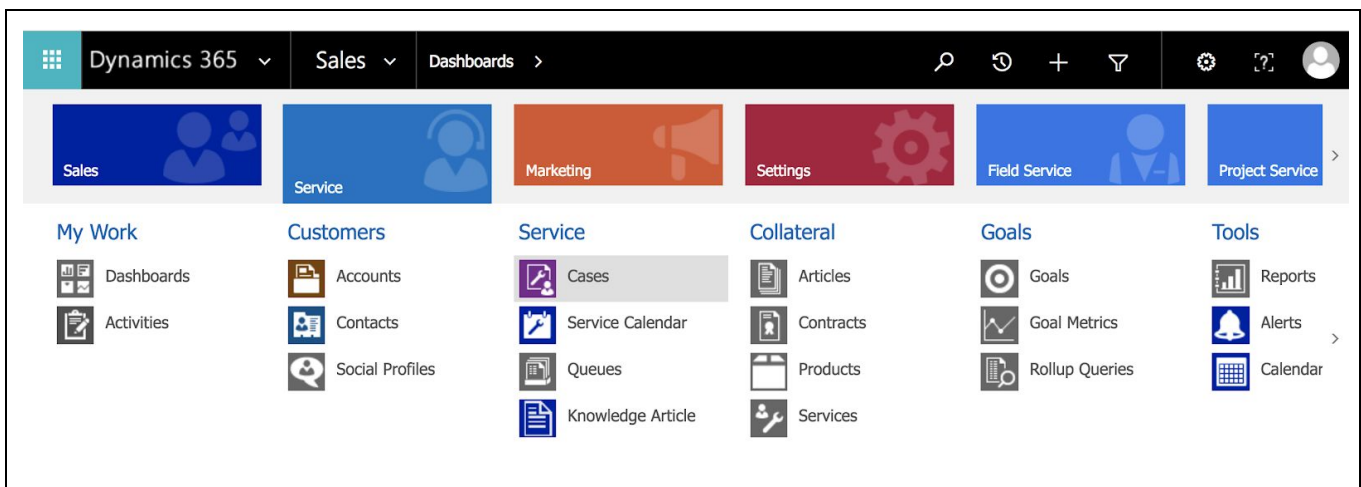
Disabled buttons appearance:



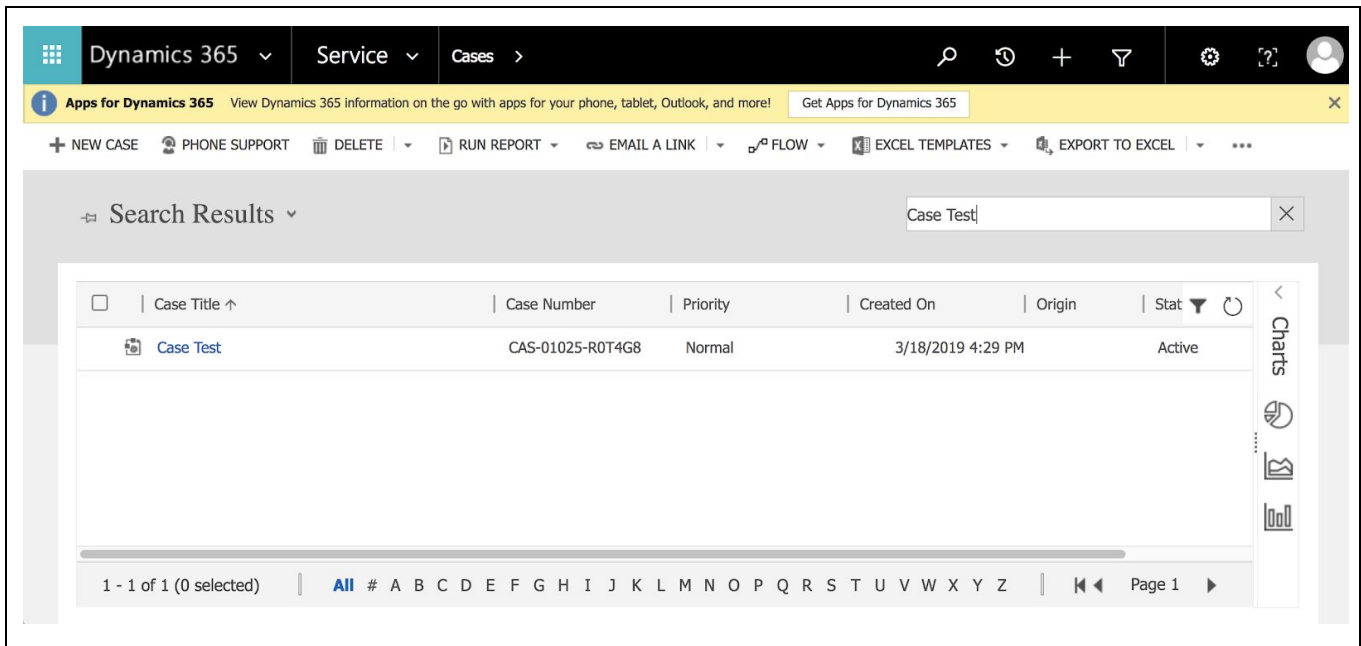
Enabled buttons appearance:



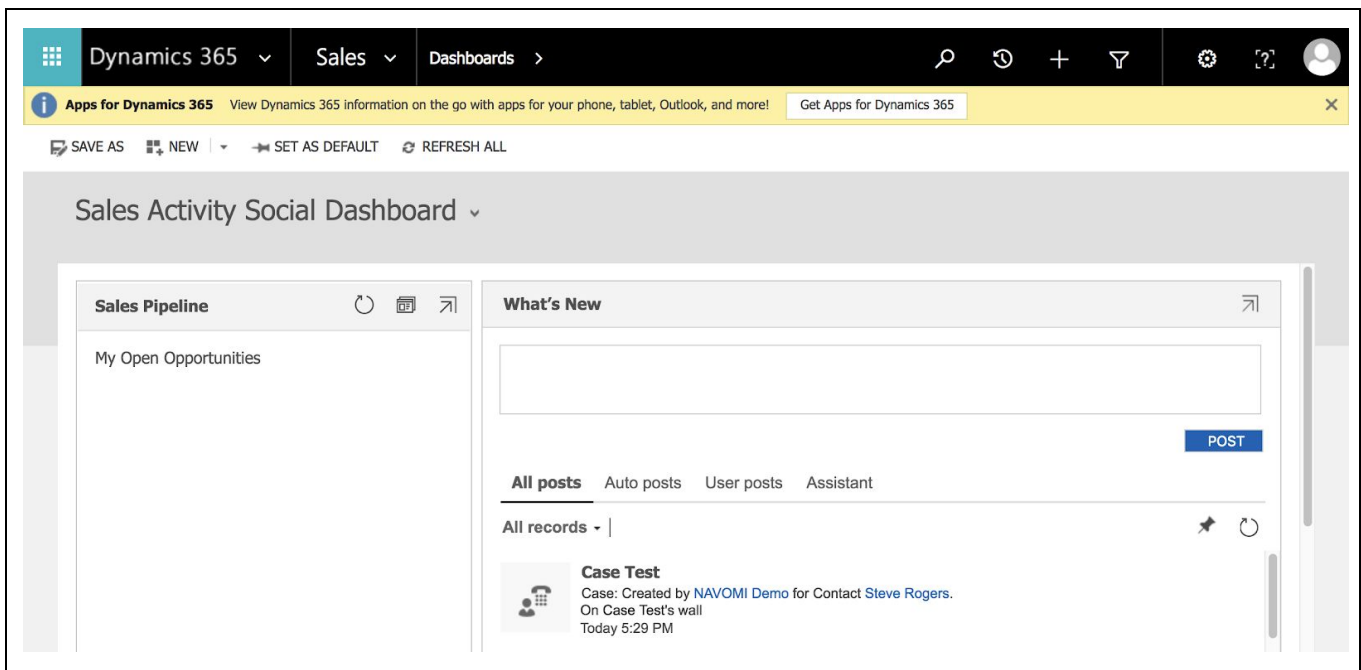
Note where this record will be stored in CRM system itself. Go to Cases using the top menu:



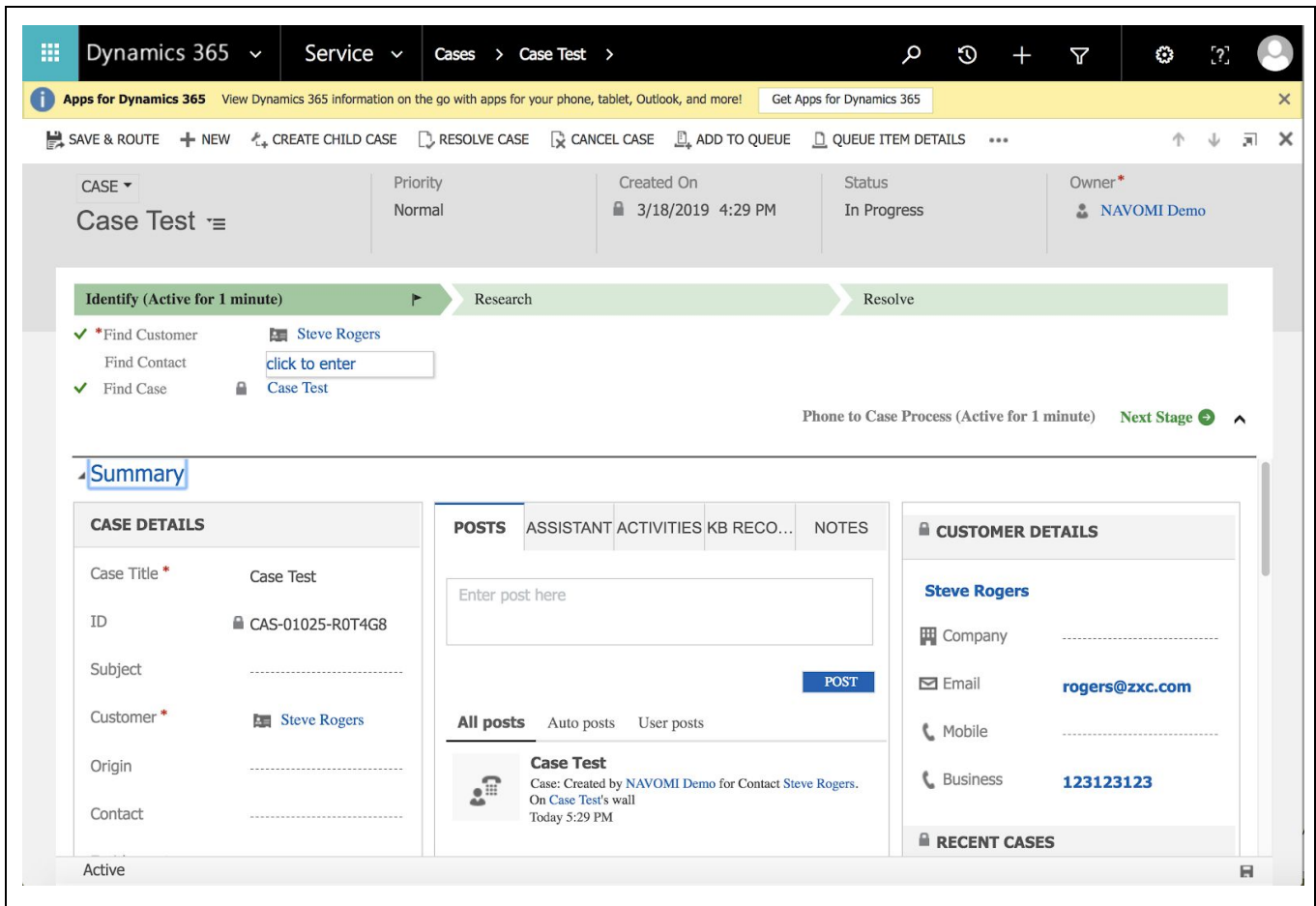
And use the search box at the top to find the record you want and click on it:



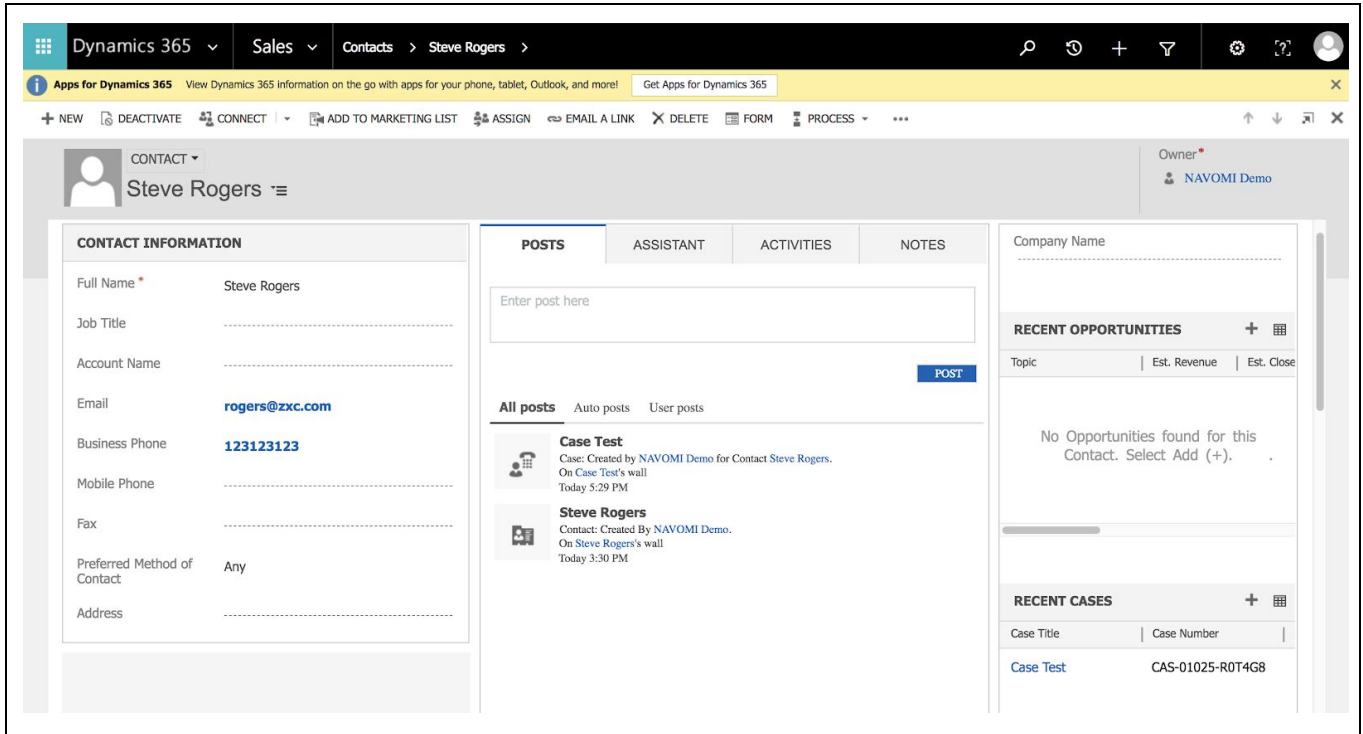
Or access directly the last record created in the Dashboard::



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:



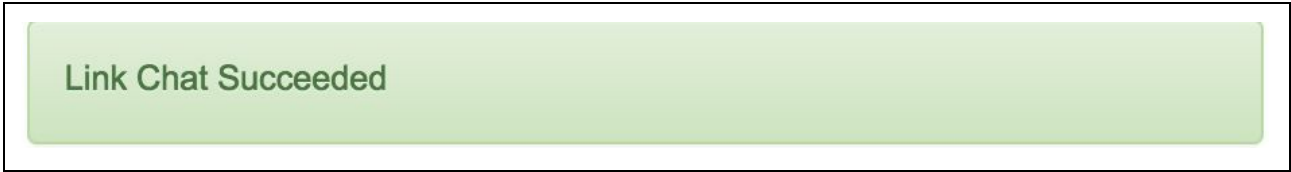
## Link Chat Transcripts to Entity

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.

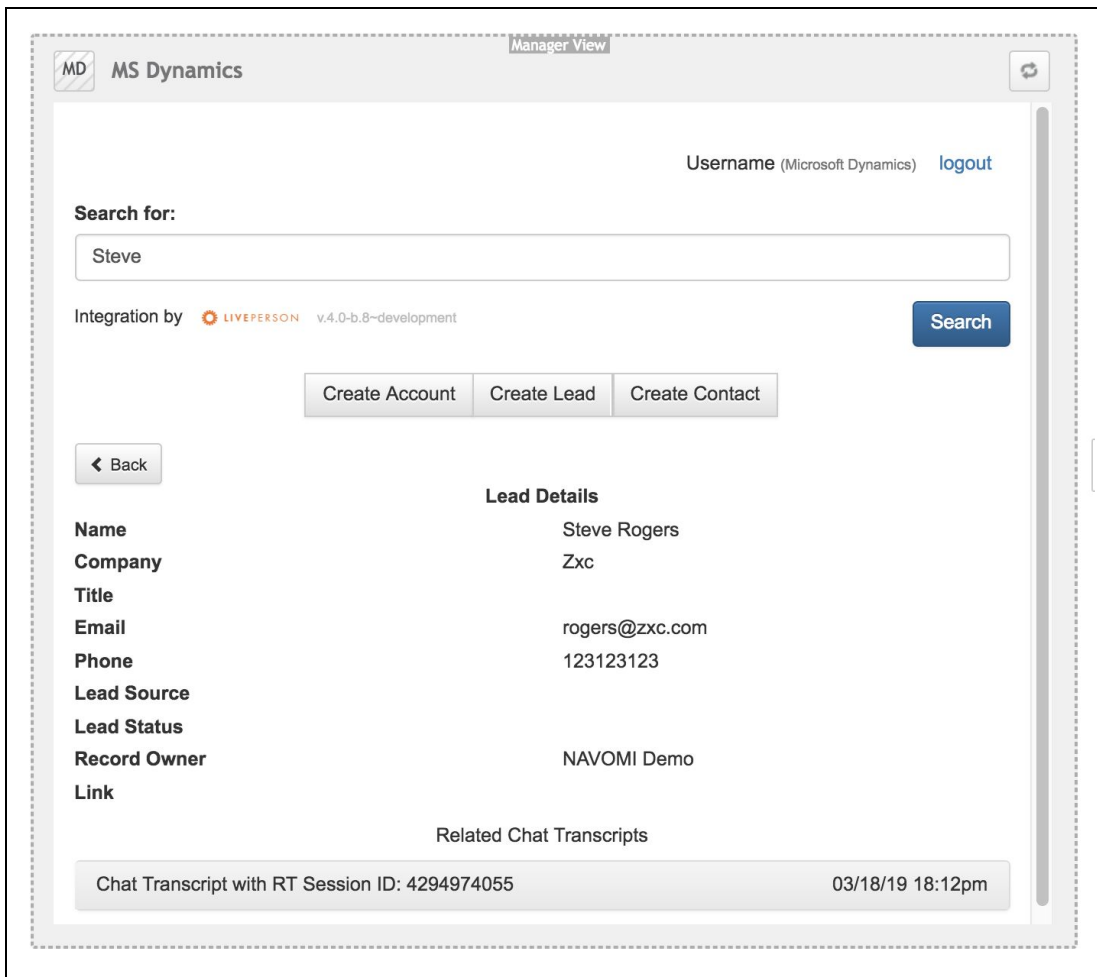


When the Chat is linked successfully, the message will be displayed:



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.



The screenshot displays the 'MS Dynamics' interface in 'Manager View'. At the top, there is a search bar with 'Steve' entered and a 'Search' button. Below the search bar, there are buttons for 'Create Account', 'Create Lead', and 'Create Contact'. A 'Back' button is also visible. The 'Lead Details' section lists the following information:

Name	Steve Rogers
Company	Zxc
Title	
Email	rogers@zxc.com
Phone	123123123
Lead Source	
Lead Status	
Record Owner	NAVOMI Demo
Link	

Below the lead details, there is a section for 'Related Chat Transcripts' with one entry: 'Chat Transcript with RT Session ID: 4294974055' dated '03/18/19 18:12pm'.



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

[← Back](#)

**Lead Details**

<b>Name</b>	Steve Rogers
<b>Company</b>	Zxc
<b>Title</b>	
<b>Email</b>	rogers@zxc.com
<b>Phone</b>	123123123
<b>Lead Source</b>	
<b>Lead Status</b>	
<b>Record Owner</b>	NAVOMI Demo
<b>Link</b>	

Related Chat Transcripts

[Chat Transcript with RT Session ID: 4294974055](#) 03/18/19 18:12pm

RT Session ID: 4294974055  
LE Attributes:  
false  
Visitor Name: Steve

Transcript:  
info: Thank you for choosing to chat with us. An agent will be with you shortly.  
info: You are now chatting with Luciano.  
Steve: Hello  
Luciano: Hello, how may I assist you?  
info: Thank you for chatting with us.

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:

The screenshot displays the Microsoft Dynamics 365 interface for a lead record. At the top, the navigation bar shows 'Dynamics 365 Sales Leads > Steve Rogers'. Below this, a yellow banner provides information about 'Apps for Dynamics 365'. The main header area includes fields for 'Lead Source', 'Rating: Warm', 'Status: New', and 'Owner: NAVOMI Demo'. A process flow is visible with stages: 'Qualify (Active for 2 hours)', 'Develop', 'Propose', and 'Close'. Below the flow, there are several 'click to enter' buttons for fields like 'Existing Contact?', 'Existing Account?', 'Purchase Timeframe', 'Estimated Budget', 'Purchase Process', and 'Identify Decision M...'. A 'mark complete' button is also present. The 'Summary' section is divided into 'Contact' (with fields for Name, Job Title, Business Phone, Mobile Phone, and Email) and 'NOTES' (containing a chat transcript with RT Session ID: 4294974055). A 'Stakeholders' section is also present but shows 'No stakeholders found.'.

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:

The image shows two examples of disabled buttons. The first example shows a button labeled '(Contact)' with two adjacent buttons to its right: 'Create Case' and 'Link Chat'. The second example shows a button labeled '- (Lead)' with a single 'Link Chat' button to its right. In both cases, the buttons are rendered in a light gray, disabled state.

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.

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