

# NETSUITE Integration Guide

## LiveEngage CRM Widget

*by LivePerson, INC*

*last revised on: 2019-03-27*

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## Version Management

Date	Version	Owner	Change History
3/5/2017	1.0	Estefania Londono	Full Final Document
11/12/2018	1.1	Luciano Buhler	Update links and references
03/21/2019	1.2	Luciano Buhler	Documentation updated according to new standardized template
03/27/2019	1.3	Luciano Buhler	Updated the sequence of the Document.

## 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 Netsuite Widget. The LiveEngage Netsuite Widget will allow to create new Accounts, Contacts, Leads, Cases, link/associate chat transcripts and globally search content.

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 NETSUITE.

## 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 on "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 Netsuite.

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 (orange 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

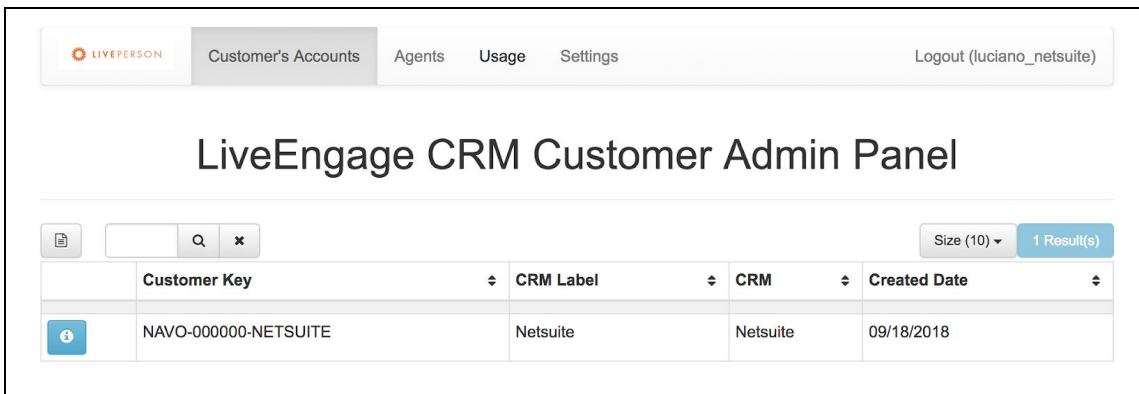
1. Make sure you receive the username and password from your Account Manager.
2. Go to the installation URL: <https://lpcrm.fs.liveperson.com/admin-panel>

### 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 'Customer's Accounts' section of the LiveEngage CRM Admin Panel. The page title is 'LiveEngage CRM Customer Admin Panel'. Below the title is a search bar and a table with columns: Customer Key, CRM Label, CRM, and Created Date. There is one entry in the table with the following details:

Customer Key	CRM Label	CRM	Created Date
NAVO-000000-NETSUITE	Netsuite	Netsuite	09/18/2018

- 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-000000-NETSUITE
<b>CRM Type</b>	Netsuite
<b>CRM Label</b>	<a href="#">Edit</a> Netsuite
<b>Netsuite Account ID</b>	<a href="#">View</a>
<b>Netsuite Client Secret</b>	<a href="#">View</a>
<b>Created At</b>	09/18/2018

### Agents (Deprecated)

Link: Admin Panel → Agents

This session will not be addressed as it is deprecated

LIVEPERSON Customer's Accounts **Agents** Usage Settings [Logout \(lb\\_sugar\)](#)

## LiveEngage CRM Customer Admin Panel

[New Agents](#)

Username CRM

## Usage

Link: Admin Panel → Usage

See the following usage statistics from the account:

The screenshot shows the LiveEngage CRM Customer Admin Panel. At the top, there is a navigation bar with 'LIVEPERSON' logo, 'Customer's Accounts', 'Agents', 'Usage' (selected), and 'Settings'. A 'Logout (lb\_sugar)' link is on the right. Below the navigation bar is the title 'LiveEngage CRM Customer Admin Panel'. Underneath, there are tabs for 'Login Usage', 'Agent Usage' (selected), 'Search Usage', and 'Link Chat Usage'. The main heading is 'Per Agent Login Count'. There is a search bar with a magnifying glass icon and a close button. To the right of the search bar, it says 'Size (10)' and '2 Result(s)'. Below this is a table with the following data:

Agent Username	Last 7 Days Usage	Current Month Usage	Previous Month Usage	Total Logins
admin	0	0	0	3
jim	0	0	0	2

## Login Usage

See the login statistics from each Agent by:

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

This screenshot shows the 'Login Usage' section of the LiveEngage CRM Customer Admin Panel. The 'Agent Usage' tab is selected. The main heading is 'Per Agent Login Count'. There is a search bar with a magnifying glass icon and a close button. To the right of the search bar, it says 'Size (10)' and '1 Result(s)'. Below this is a table with the following data:

Agent Username	Last 7 Days Usage	Current Month Usage	Previous Month Usage	Total Logins
jim	2	2	0	4

### Agent Usage

See the login statistics from all Agents by:

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

The screenshot shows a table titled "Total Agent Logins" with the following data:

Last 7 Days Usage	Current Month Usage	Previous Month Usage	Total Logins
2	2	0	4

### Search Usage:

See the search statistics from all Agents by:

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

The screenshot shows a table titled "Search Count" with the following data:

Past 7 Days Usage	Current Month Usage	Past Month Usage	Total Usage Till Date
			4

### 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



Navigation: Login Usage | Agent Usage | Search Usage | **Link Chat Usage**

**Create Case Count** Size (10) ▾ 1 Result(s)

Past 7 Days Usage	Current Month Usage	Past Month Usage	Total Usage Till Date
			4

**Link Chat Count** Size (10) ▾ 1 Result(s)

Past 7 Days Usage	Current Month Usage	Past Month Usage	Total Usage Till Date
			9

## Settings

Link: Admin Panel → Settings

Here you can check and update your profile information.

LIVEPERSON 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

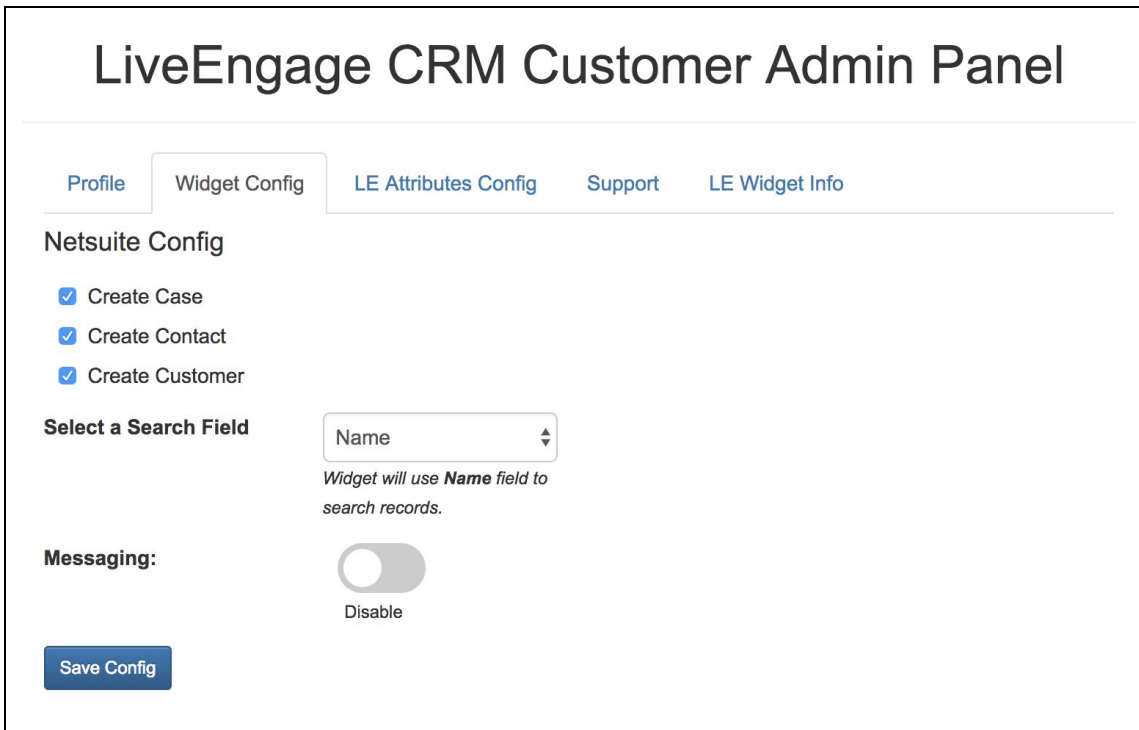
<b>Company</b>	Acme
<b>Contact Name</b>	Elmer Fudd
<b>Email</b>	elmer@acme.com
<b>Username</b>	elmer

[Update Profile](#)

## Widget Config

Link: Admin Panel → Settings → Widget Config




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



## 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 the 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

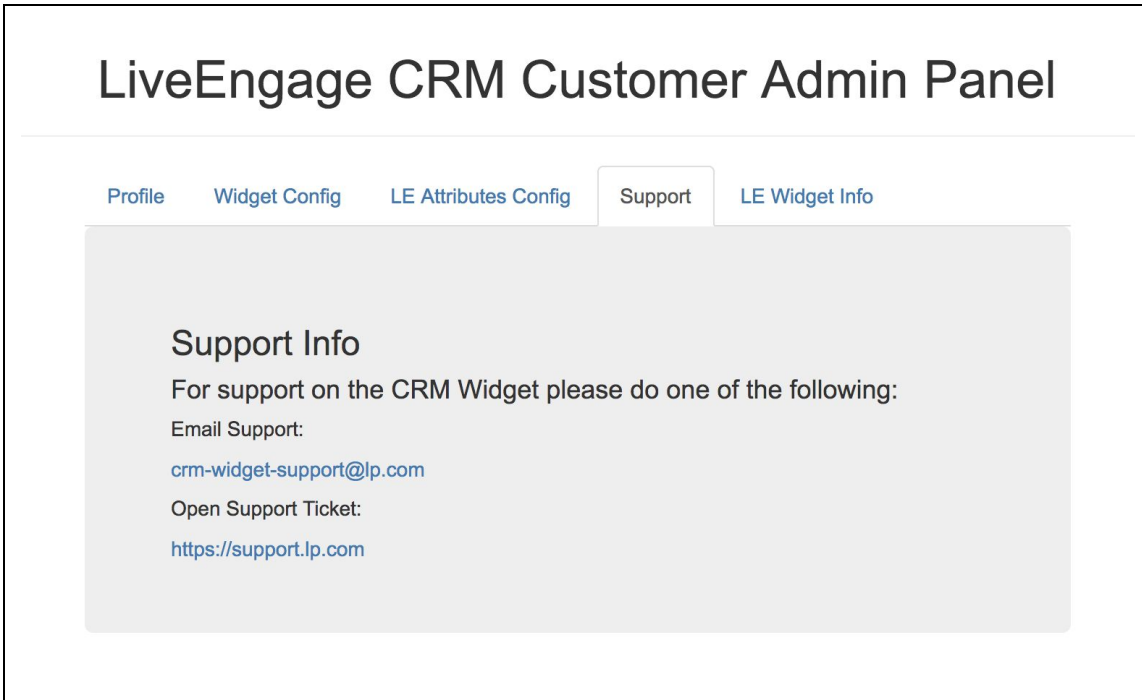
>

<

## 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.



## LiveEngage CRM Customer Admin Panel

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

LE Widget URL: <https://lpcrm.fs.liveperson.com?apiKey=NAVO-000000-NETSUITE>

Callback URL Netsuite: <https://lpcrm.fs.liveperson.com/oauth2>

[Netsuite Setup Documentation](#)

Version:  
4.0

Build:  
8~development

## 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.
- Netsuite Account ID: Account ID from Netsuite.
- Netsuite Client Secret: Client Secret from Netsuite.

## LiveEngage CRM Customer Admin Panel

[← Back](#)

### License Info

<b>Customer Key</b>	NAVO-000000-NETSUITE
<b>CRM Type</b>	Netsuite
<b>CRM Label</b>	<a href="#">Edit</a> Netsuite
<b>Netsuite Account ID</b>	<a href="#">Hide</a> <a href="#">Edit</a> <YOUR_CRM_ACCOUNT_ID>
<b>Netsuite Client Secret</b>	<a href="#">Hide</a> <a href="#">Edit</a> <YOUR_CRM_CLIENT_SECRET>
<b>Created At</b>	09/18/2018

## Widget Config

Link: Admin Panel → Settings → Widget Config

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

The screenshot shows the 'LiveEngage CRM Customer Admin Panel' with a navigation bar containing 'Profile', 'Widget Config', 'LE Attributes Config', 'Support', and 'LE Widget Info'. The 'Widget Config' tab is active. Under the 'Netsuite Config' section, there are three checked checkboxes: 'Create Case', 'Create Contact', and 'Create Customer'. Below this is a 'Select a Search Field' dropdown menu currently set to 'Name', with a note stating 'Widget will use **Name** field to search records.' There is also a 'Messaging:' section with a disabled toggle switch and the text 'Disable'. A 'Save Config' button is located at the bottom left of the configuration area.

- Enabling/disabling entities that can be created within Netsuite:
  - Create Case
  - Create Contact
  - Create Customer
- Select a Search Field:
  - Name
  - Email
  - Phone

## Configure CRM

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

## Create A New 'Web Service Integration' Entry

You will need to create a "Web Service Integration" to allow our CRM Widget access to your NetSuite data. To do so, please navigate the following menu options:

*NetSuite Menu -> Setup -> Setup Manager*

*Setup Manager left navigation menu -> Integration -> Manage Integration -> New*

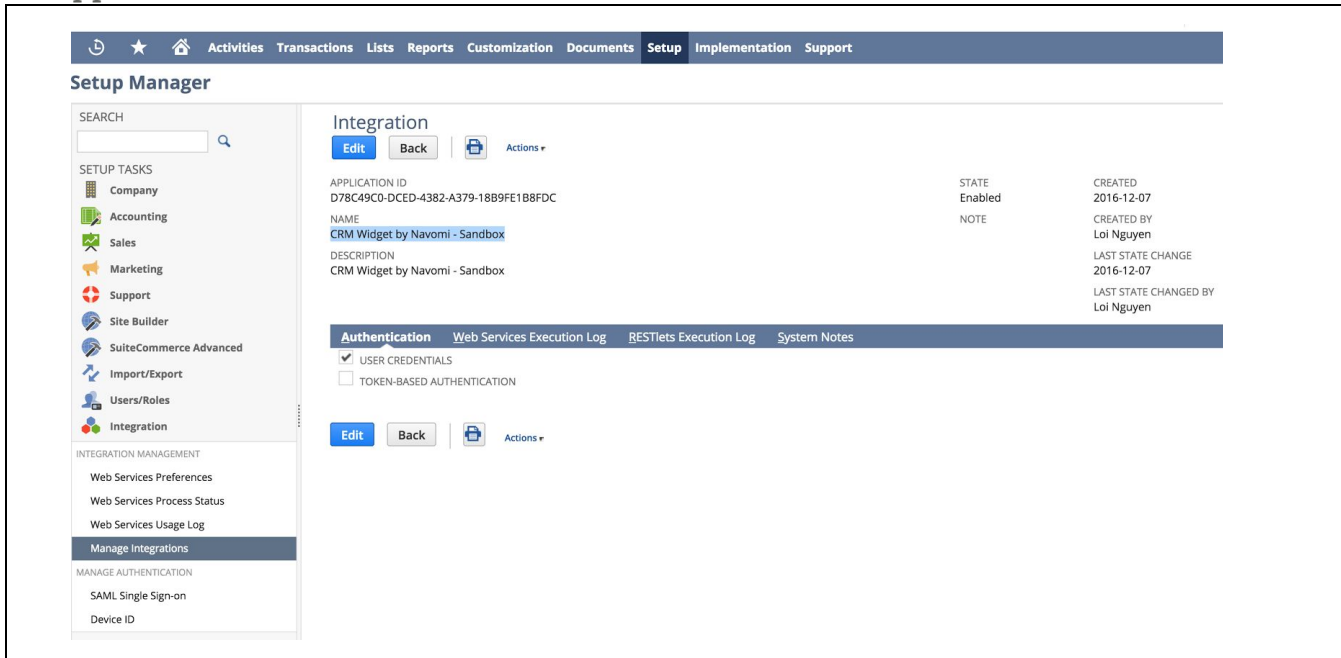
You will need to enter the following information, as shown in the image below:

- Name = LiveEngage Widget
- Description = LiveEngage Widget for NetSuite
- Then click "Save"

The screenshot shows the NetSuite Setup Manager interface. The top navigation bar includes 'Activities', 'Transactions', 'Lists', 'Reports', 'Customization', 'Documents', 'Setup', 'Implementation', and 'Support'. The 'Setup Manager' section is active, with a search bar and a list of setup tasks on the left. The 'Integration' form is displayed, featuring a 'NAME' field with the value 'CRM Widget by Navomi', a 'DESCRIPTION' field with the value 'CRM Widget by Navomi', and a 'STATE' dropdown menu set to 'Enabled'. Below the form, there are tabs for 'Authentication', 'Web Services Execution Log', and 'RESTlets Execution Log'. The 'Authentication' tab is selected, showing options for 'USER CREDENTIALS' (checked) and 'TOKEN-BASED AUTHENTICATION' (unchecked). 'Save', 'Cancel', and 'Reset' buttons are visible at the bottom of the form.

You will be presented with the 'Web Service Integration' information screen, as shown in the image below, after clicking the save button. Make sure to write down the following information and update your widget's Admin Panel accordingly:

- Account ID = Client ID on Admin Panel
- Application ID = Client Secret on Admin Panel



## Configure Entry Forms

Since the CRM Widget will store chat transcripts within a Note object, the NetSuite Administrator must ensure that “Communication” “Note” is made available in the “Entry Forms”. If you use the standard Entry Forms, no further configuration is required. The chat transcript will be available under “Communication -> User Notes” as shown in the image below.

If you are not using the preferred/customs “Entry Forms” you will need to make an update to include communication notes to all the form (example: customer, contacts) you are going to link chat transcripts to.

Updating Customer Form:

1. Go to Menu
2. Select Customization tab
3. In the drop down, select “Forms”

4. Then select "Entry Forms"
5. Once in "Entry Form" click on "Edit" on the Customer form currently being used:

The screenshot displays the NetSuite Customer Form interface. The top navigation bar includes tabs for Activities, Cases, Issues, Customers, Reports, Documents, Setup, and Support. The main form area is divided into several sections:

- CUSTOM FORM:** Includes a dropdown for "Standard Customer Form", a "CUSTOMER ID" field with "Loi Nguyen" and an "AUTO" checkbox, and "TYPE" radio buttons for "COMPANY" (selected) and "INDIVIDUAL".
- COMPANY NAME:** A text field containing "Loi Nguyen".
- PARENT COMPANY:** A dropdown menu.
- STATUS:** A dropdown menu set to "CUSTOMER-Closed Won".
- SALES REP:** A dropdown menu.
- PARTNER:** A dropdown menu.
- WEB ADDRESS:** A text field.
- CATEGORY:** A dropdown menu.
- DEFAULT ORDER PRIORITY:** A text field.
- COMMENTS:** A text area.
- Email | Phone | Address:** Fields for "EMAIL" (loi@navomi.com), "PHONE" (123123213), "ALT. PHONE", "FAX", and "ADDRESS" with a "Map" button.
- Classification:** A field for "TESTSEGMENT" with the value "segment1".

Below the main form is a "User Notes" section with a "Messages" tab and a "VIEW" dropdown set to "Default". It contains a table of notes:

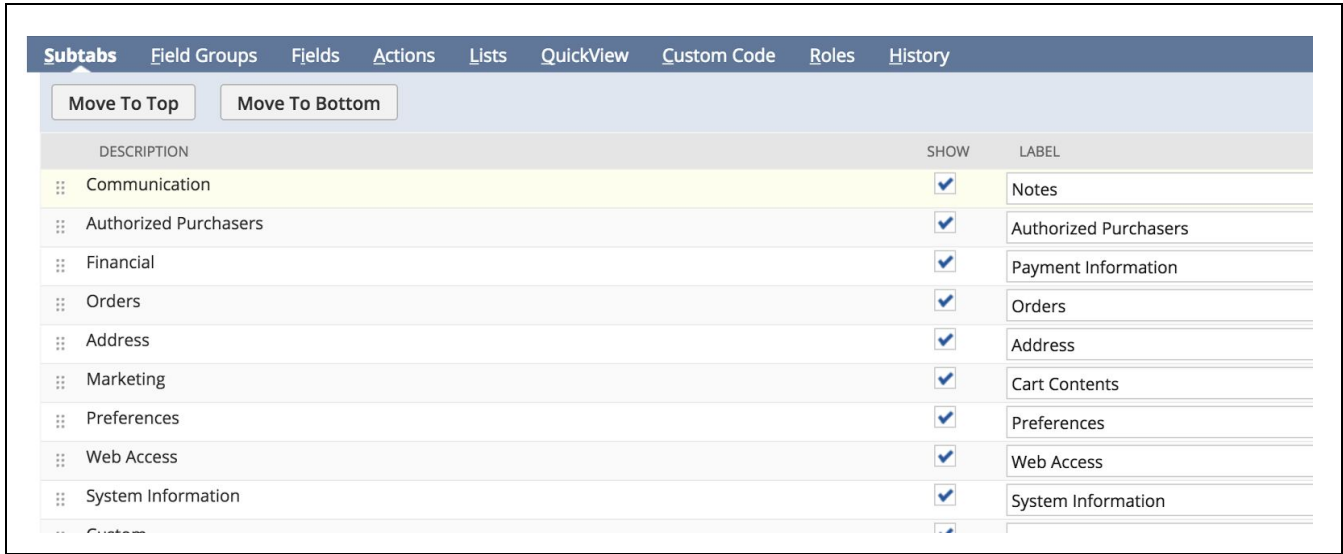
EDIT	DATE ▼	AUTHOR	TITLE	MEMO	DIRECTION	TYPE	REMOVE
Edit	11/10/2016 6:19 pm	Harmony Harmony Netsuite Harmony Harmony Netsuite	LPChat-Loi Nguyen-4294971474	RT Session ID: 4294971474 Visitor Name: Loi Nguyen			Remove
Edit	10/26/2016 4:25 pm	Harmony Harmony Netsuite Harmony Harmony Netsuite	LPChat-Loi Nguyen-4294971442	Transcript: Info: Thank you (more...) RT Session ID: 4294971442			Remove

However, if you use customized Entry Forms, you will need to edit it and include Communication Notes there.

From NetSuite Menu -> *Customization* -> *Forms* -> *Entry Forms*

Then select and edit your entry forms. Ensure that the SHOW check box in front of "Communication" is checked as shown in the image below.





The screenshot shows a NetSuite configuration page for subtabs. At the top, there is a navigation bar with tabs: Subtabs, Field Groups, Fields, Actions, Lists, QuickView, Custom Code, Roles, and History. Below this, there are two buttons: 'Move To Top' and 'Move To Bottom'. The main content is a table with three columns: DESCRIPTION, SHOW, and LABEL. The 'Communication' row is highlighted in yellow and has a checked checkbox in the 'SHOW' column. Other rows include 'Authorized Purchasers', 'Financial', 'Orders', 'Address', 'Marketing', 'Preferences', 'Web Access', and 'System Information', all with checked checkboxes in the 'SHOW' column.

DESCRIPTION	SHOW	LABEL
Communication	<input checked="" type="checkbox"/>	Notes
Authorized Purchasers	<input checked="" type="checkbox"/>	Authorized Purchasers
Financial	<input checked="" type="checkbox"/>	Payment Information
Orders	<input checked="" type="checkbox"/>	Orders
Address	<input checked="" type="checkbox"/>	Address
Marketing	<input checked="" type="checkbox"/>	Cart Contents
Preferences	<input checked="" type="checkbox"/>	Preferences
Web Access	<input checked="" type="checkbox"/>	Web Access
System Information	<input checked="" type="checkbox"/>	System Information

You will also need to ensure that your notes have proper permissions (SHOW field checked) on the Title, Date, Time and Memo fields as shown in the image below.

ID  
custform\_19\_1550355\_292

TYPE  
Other Record

SUBTYPE  
Note

**Fields** Actions Custom Code Roles History

Move To Top Move To Bottom New Field

DESCRIPTION	SHOW	MANDATORY	DISPLAY TYPE	LABEL
:: Custom Form	<input type="checkbox"/>	<input type="checkbox"/>	Normal ▾	Custom Form
:: Title	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Normal ▾	Title
:: Type	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal ▾	Type
:: Direction	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal ▾	Direction
:: Permanent Note	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal ▾	Permanent Note
:: Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal ▾	Date
:: Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal ▾	Time
:: Memo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Normal ▾	Memo
:: Note Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal ▾	Note Time

Save ▾ Cancel Reset Move Elements Between Subtabs Change ID Actions ▾

Note! In the event that the Netsuite Admin is not able to find or select the Communication Notes, please contact NetSuite Support or NetSuite Account manager to get access.

## Adding Widget in LiveEngage Console

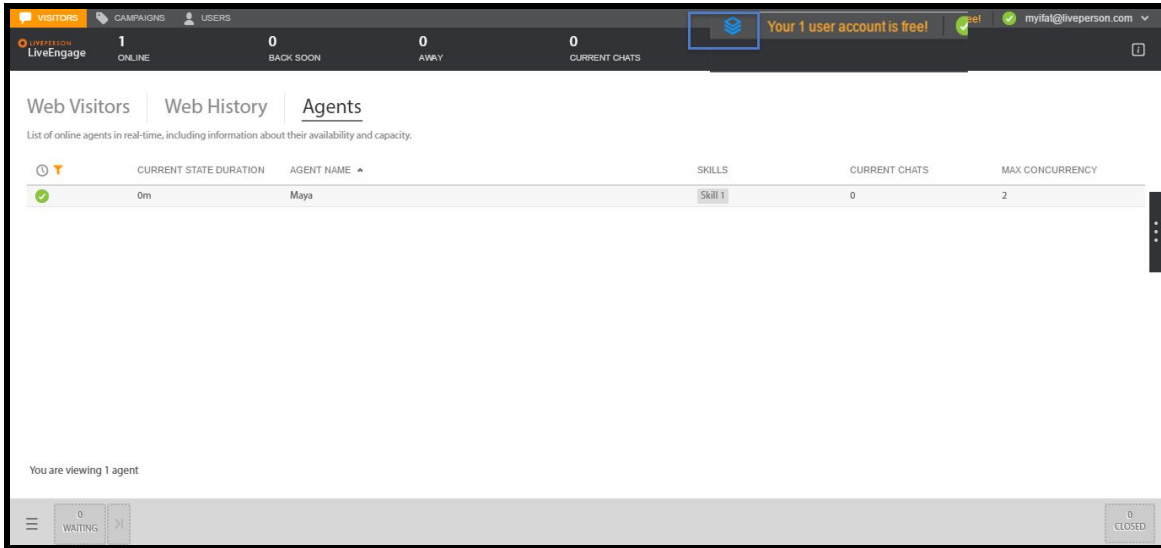
Now that you've updated the CRM Widget profile and license information, it is time to go to LiveEngage and configure the widget.

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

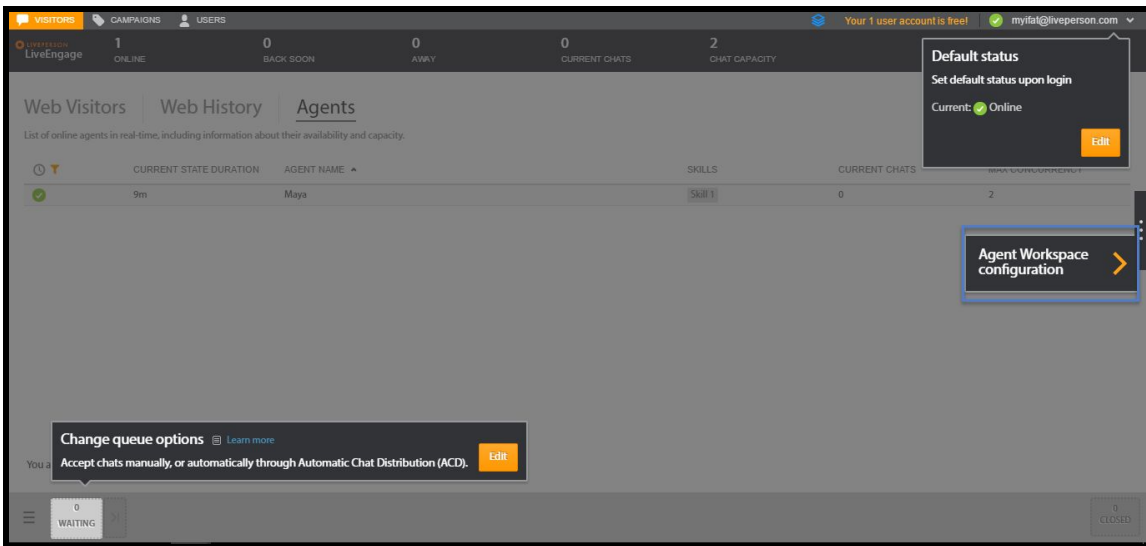
1. Access "Night Vision" settings menu: click on the icon on the top right of your screen as shown in the screenshot below:



## LE - NETSUITE Integration Guide

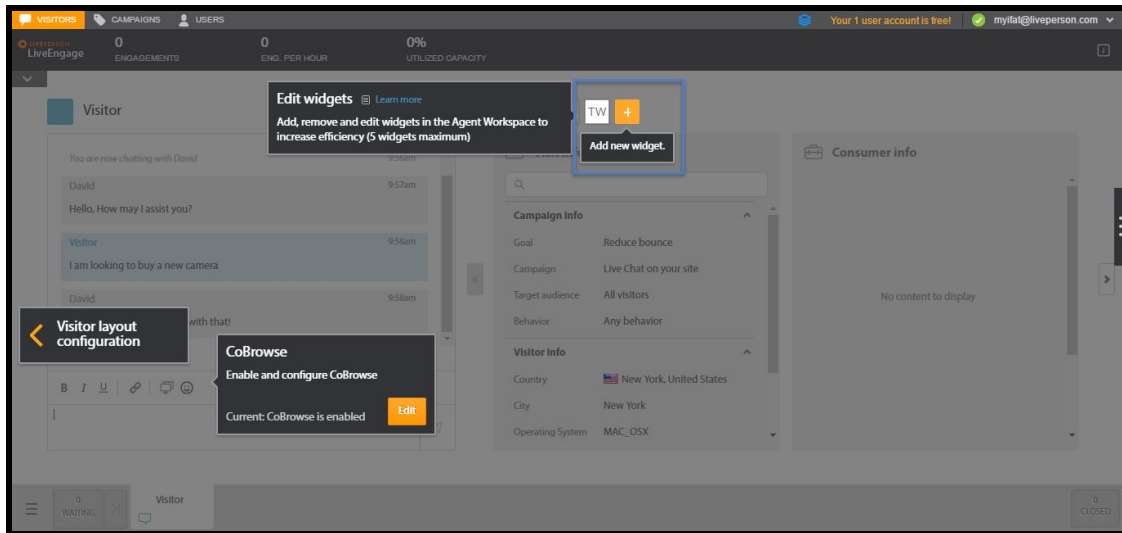


2. Once in Night Vision, click on “Agent Workspace Configuration”



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

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4. Choose the name for the Widget (you can use "Netsuite" to have "NE" 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 NETSUITE.

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

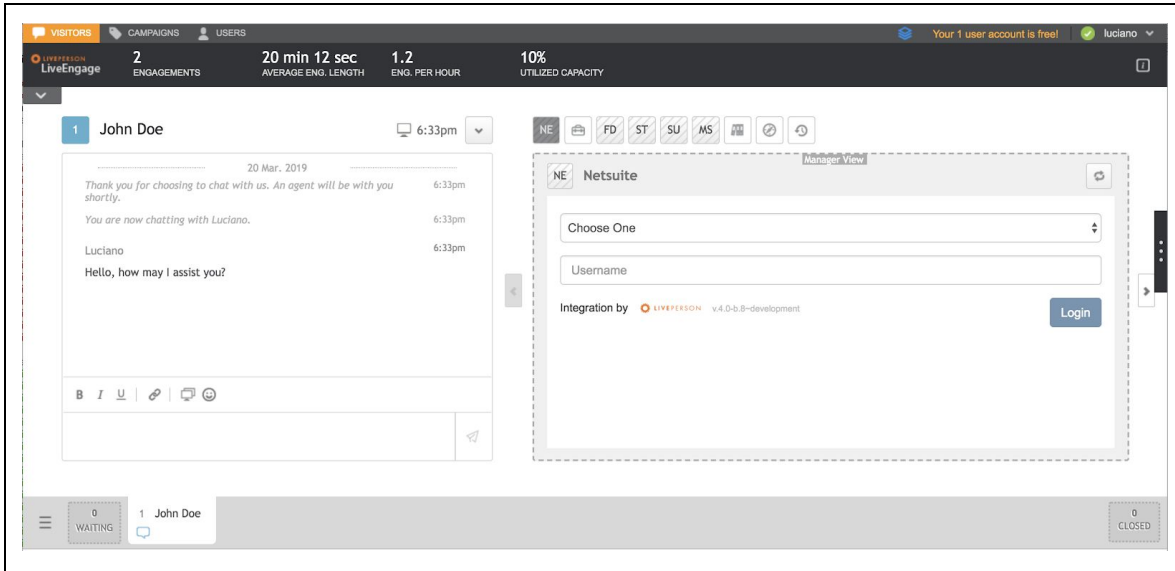
### Overview

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

- Starting Netsuite Widget
- Login Widget
- Custom Functionalities
- Search Records
- Search Records Filter / Fields
- View Records
- View Transcript Associated with Records
- Create New Records
  - Create Customer
  - Create Contact
- Linking a Chat Transcript to Entity
- Unlink Chat Transcripts

### Starting Netsuite Widget

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



## Login Widget

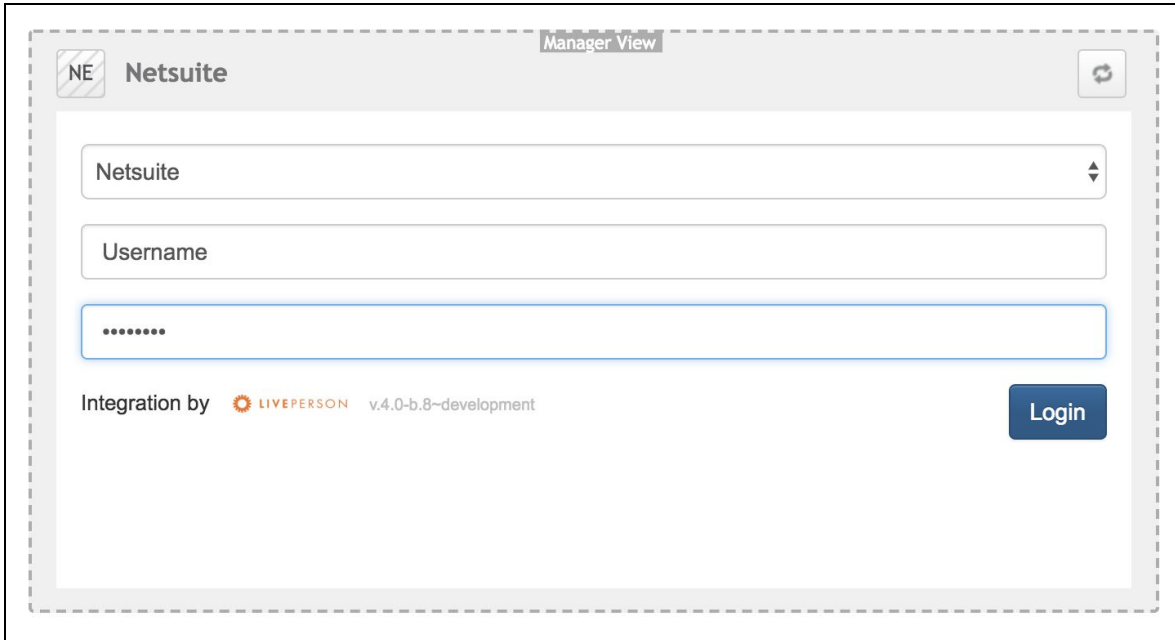
To be able to access the Widget functionalities, you must insert valid credentials to the registered CRM:

Select registered CRM:

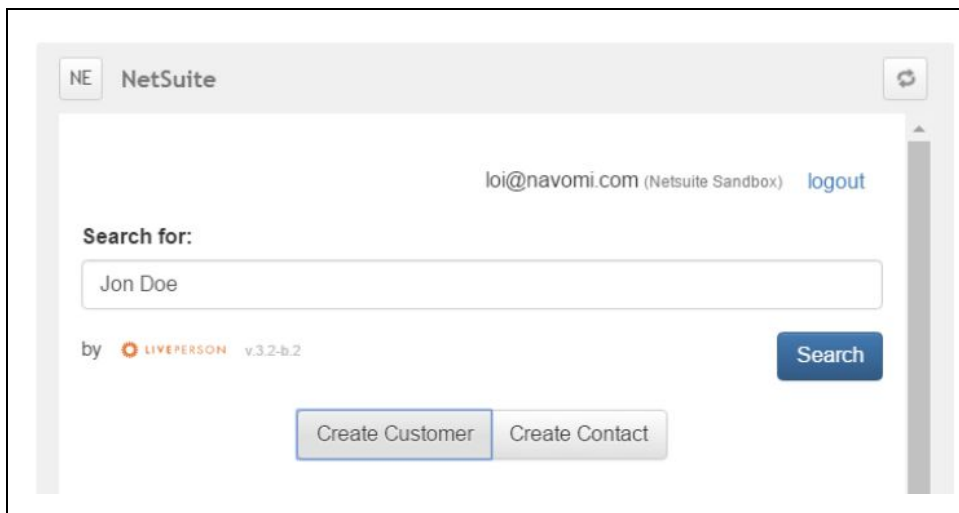


The screenshot shows a web interface for configuring the Netsuite integration. At the top, there is a navigation bar with icons for 'NE', a briefcase, 'FD', 'ST', 'SU', 'MS', a server rack, a refresh icon, and a back icon. Below this is a 'Manager View' header. The main content area is titled 'Netsuite' and contains a dropdown menu with 'Choose One' selected and 'Netsuite' as the chosen option. Below the dropdown is a text input field labeled 'Username'. At the bottom left, it says 'Integration by LIVEPERSON v.4.0-b.8~development'. At the bottom right, there is a blue 'Login' button.

Enter your credentials (Username and Password):



Click on "Login" button and wait for the login process. 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 Netsuite objects:

- Customers Object
- Contacts 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 Netsuite 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 the 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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[Profile](#) **Widget Config** [LE Attributes Config](#) [Support](#) [LE Widget Info](#)

## Netsuite Config

- Create Case
- Create Contact
- Create Customer

**Select a Search Field**

✓

Name

Email

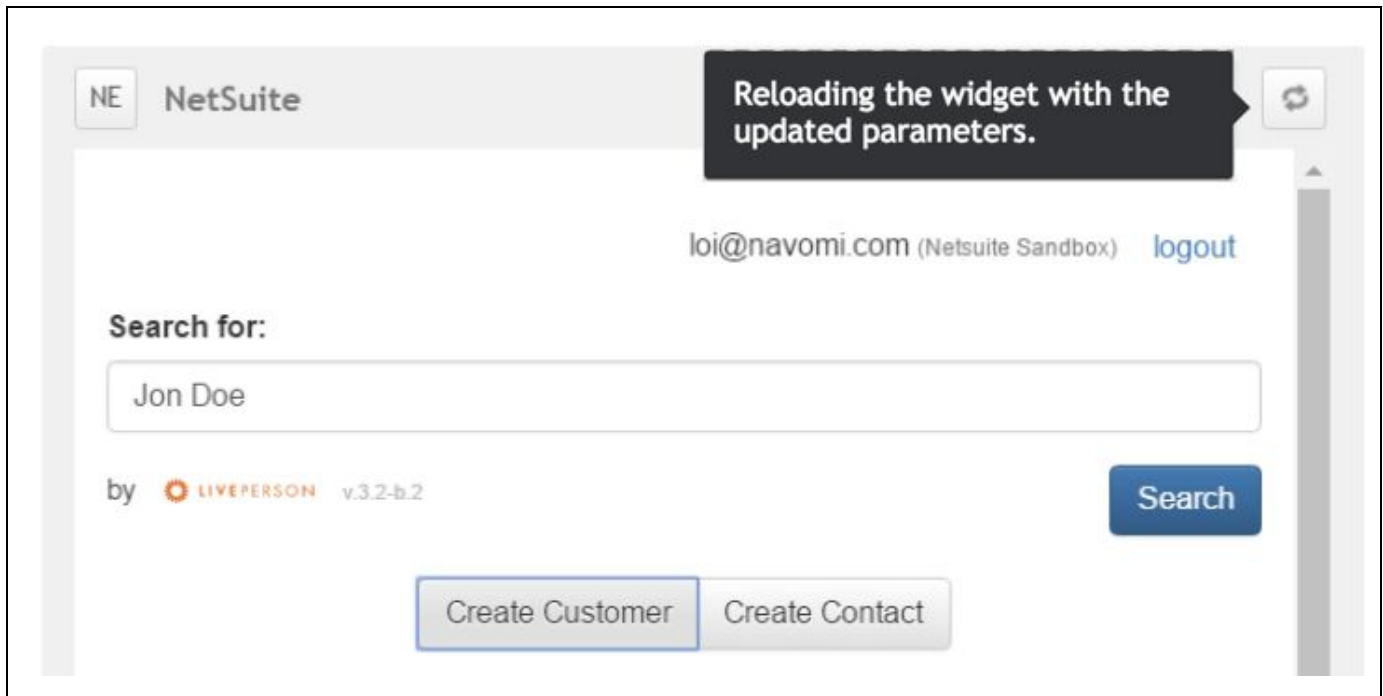
Phone

Disable

**Messaging:**

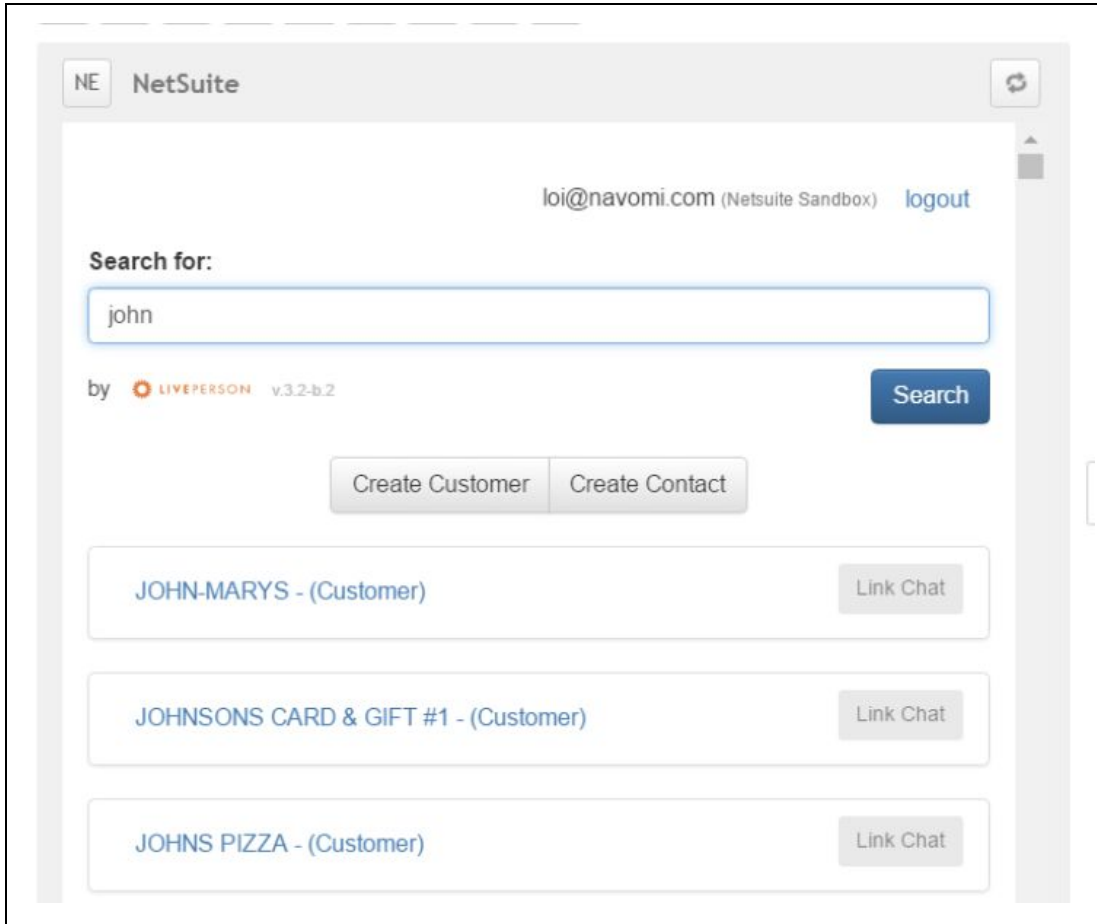
[Save Config](#)

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 .



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

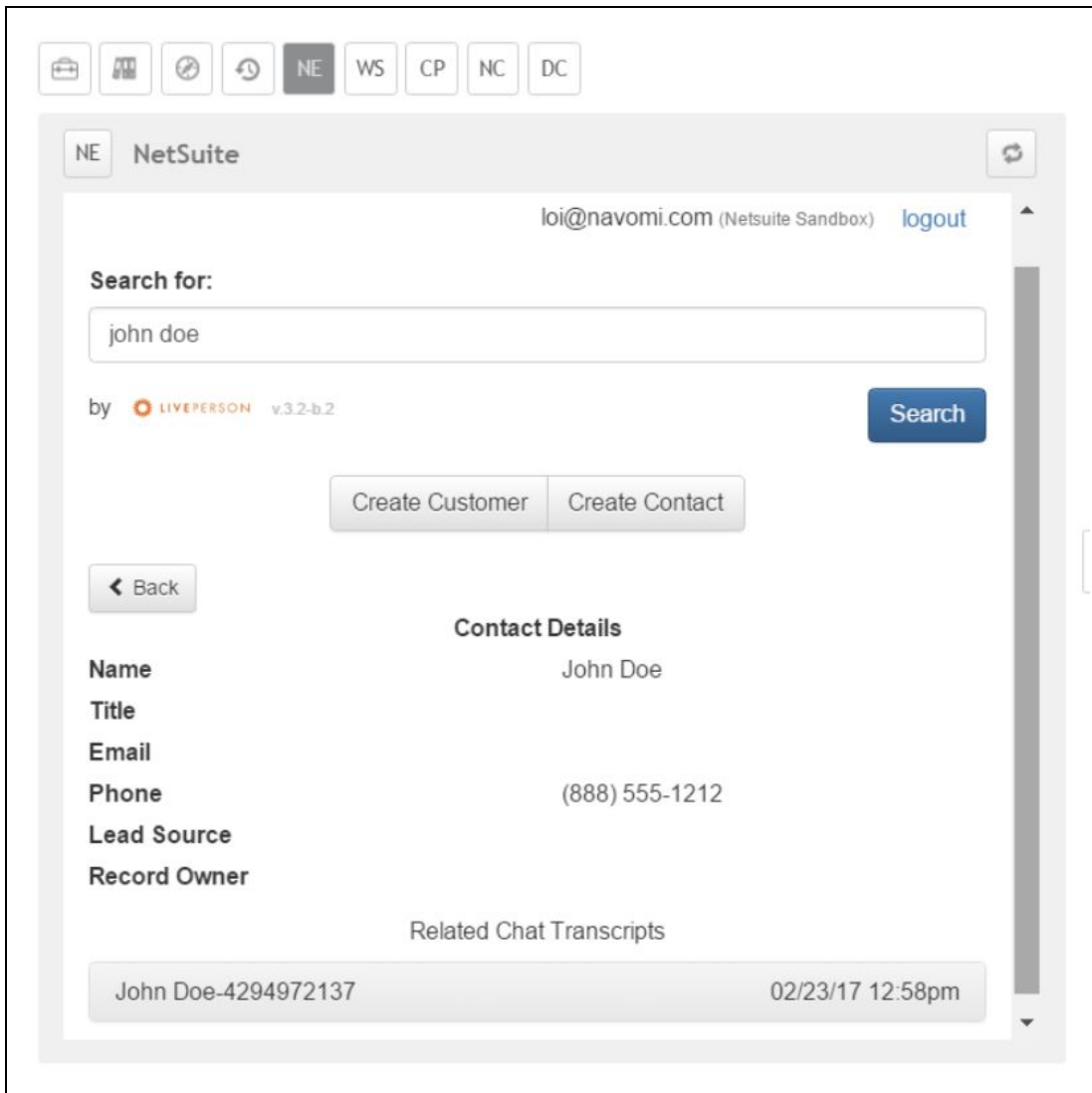
[← Back](#)

**Contact Details**

<b>Name</b>	John Doe
<b>Title</b>	
<b>Email</b>	
<b>Phone</b>	(888) 555-1212
<b>Lead Source</b>	
<b>Record Owner</b>	

## 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 shown in the screen below:

The screenshot displays a NetSuite interface with a top navigation bar containing icons for Home, Reports, Search, Refresh, and tabs for NE, WS, CP, NC, and DC. The main content area is titled 'NetSuite' and includes a 'Back' button. Below this, the 'Contact Details' section lists the following information:

- Name: John Doe
- Title:
- Email:
- Phone: (888) 555-1212
- Lead Source:
- Record Owner:

Below the contact details is a section for 'Related Chat Transcripts'. A transcript entry is shown with the following details:

- Subject: [John Doe-4294972137](#)
- Date/Time: 02/23/17 12:58pm

The transcript content is as follows:

RT Session ID: 4294972137  
Visitor Name: John Doe

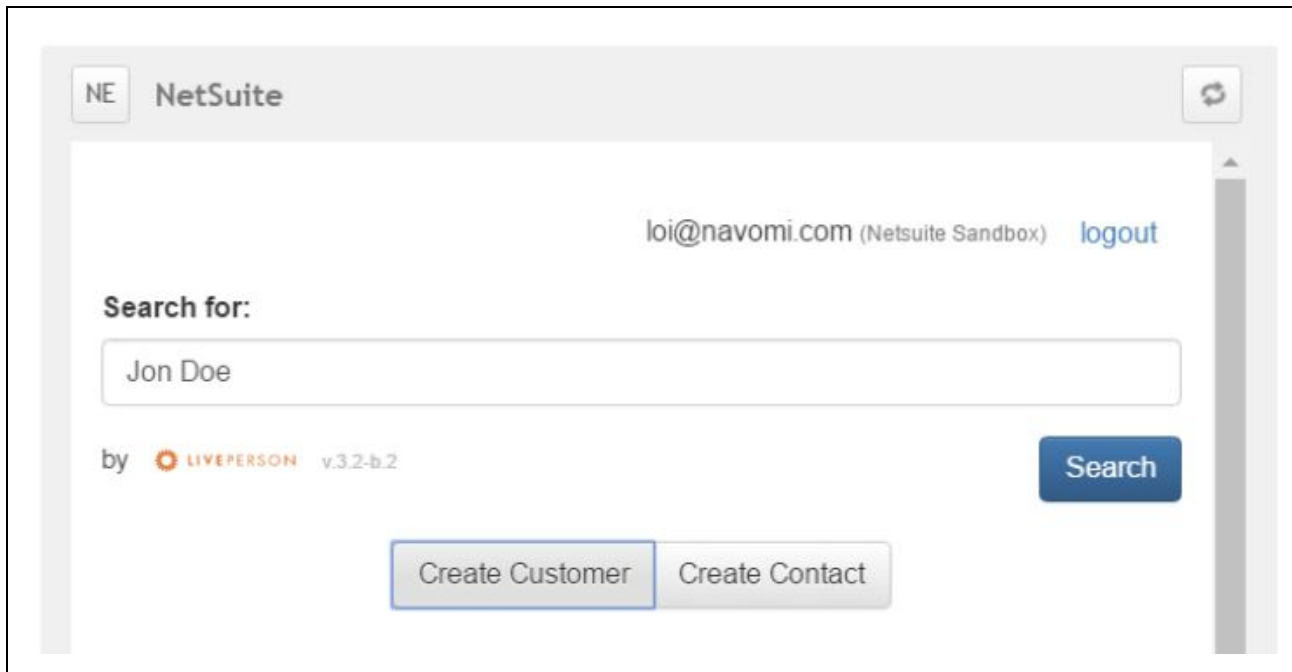
Transcript:  
info: Thank you for choosing to chat with us. An agent will be with you shortly.  
info: You are now chatting with vinod.  
vinod: Hi John how may I help you ?  
John Doe: I need help with my recent bill  
vinod: Can you provide more details ? account# and bill month ?  
John Doe: Sure, I believe both my equipment insurance and installment fee are charged even though they should have stopped prior to last month. So my issue

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

## Create New Records

The Netsuite provide the following features:

- Create Customer
- Create Contact



### Create Customer

Click on "Create Customer" 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.

### Quick Create Customer

**Customer Name \***

**Email \***

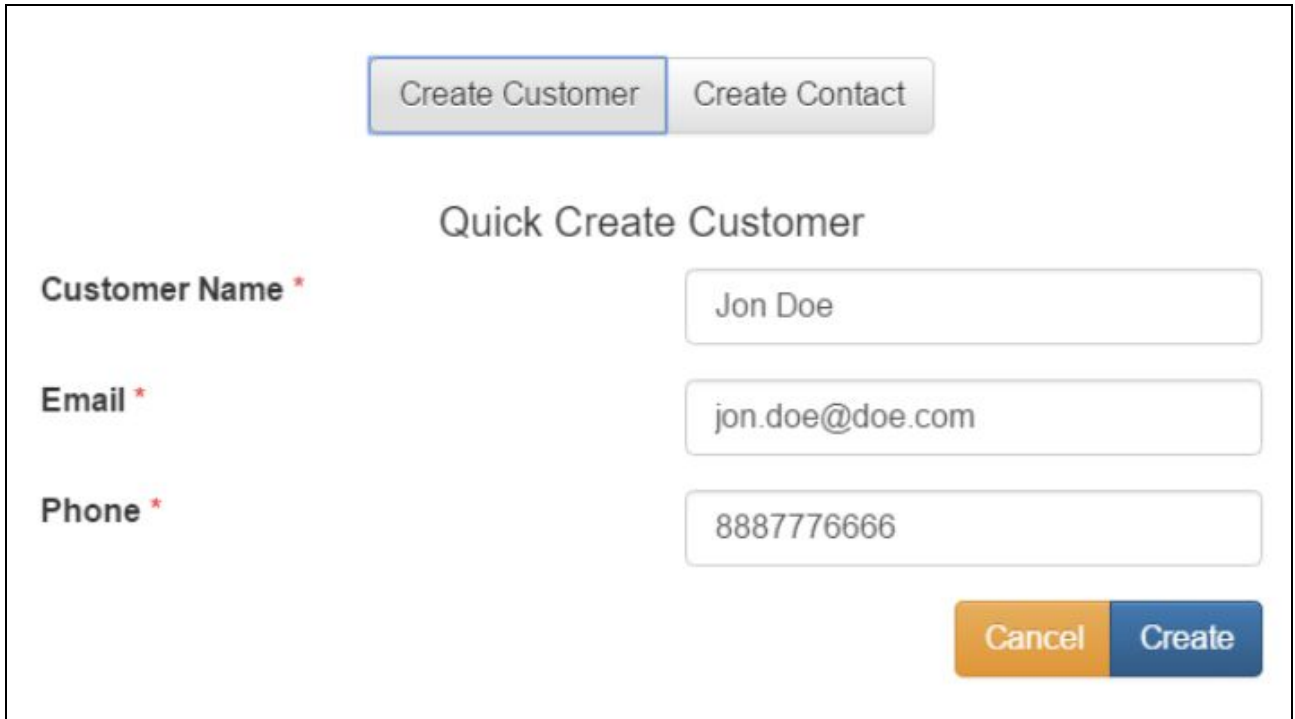
**Phone \***



## Create Contact

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

- Fill in all the relevant fields in the form
  - All required fields are denoted with an asterisk.
- 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.



Quick Create Customer

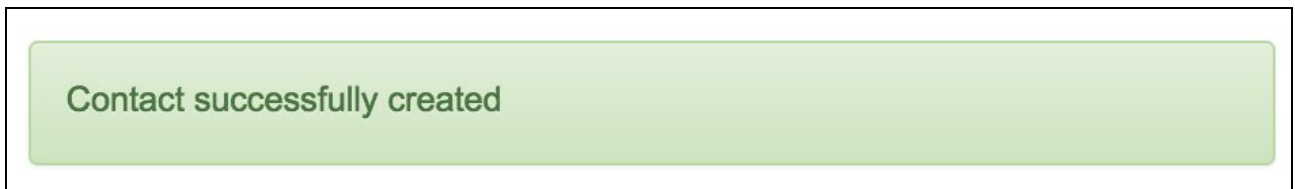
Customer Name \* Jon Doe

Email \* jon.doe@doe.com

Phone \* 8887776666

Cancel Create

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



Contact successfully created



## Link Chat Transcripts to Entity

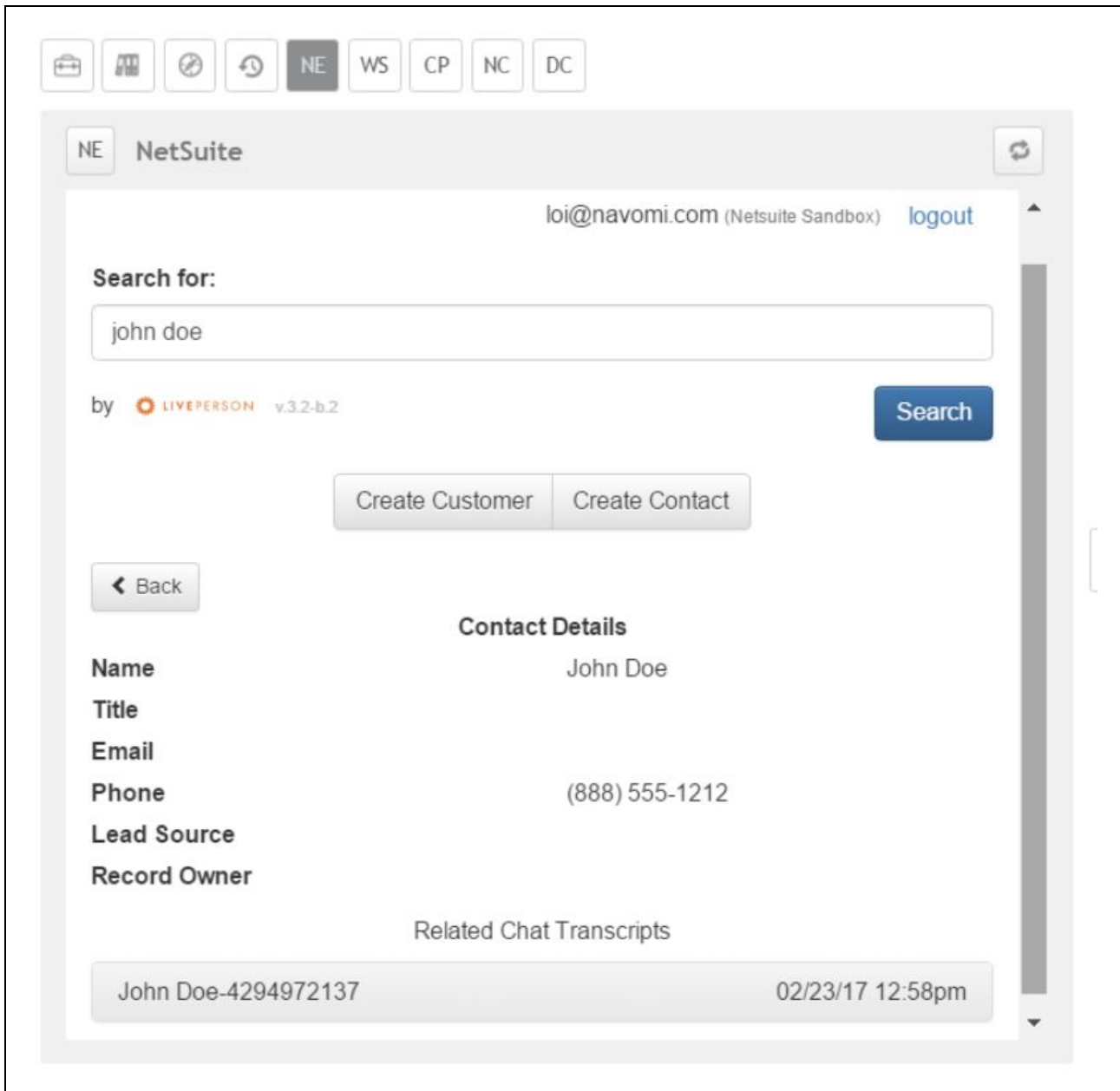
In case the chat is related to an existing record, you can link the chat to that relevant record in Netsuite:

- You can attach a current chat transcript to a Netsuite record by clicking on the “Link Chat” button once the session has ended.



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 shown in the screen below:

The screenshot shows a web interface for NetSuite. At the top, there is a navigation bar with icons for Home, Reports, Settings, and a menu containing 'NE', 'WS', 'CP', 'NC', and 'DC'. Below this is a header for 'NetSuite' with a refresh icon. A 'Back' button is visible. The main content area is titled 'Contact Details' and lists the following information:

- Name:** John Doe
- Title:**
- Email:**
- Phone:** (888) 555-1212
- Lead Source:**
- Record Owner:**

Below the contact details is a section for 'Related Chat Transcripts'. One transcript is shown with the following details:

- Link:** [John Doe-4294972137](#)
- Time:** 02/23/17 12:58pm

The transcript content is as follows:

RT Session ID: 4294972137  
Visitor Name: John Doe

Transcript:  
info: Thank you for choosing to chat with us. An agent will be with you shortly.  
info: You are now chatting with vinod.  
vinod: Hi John how may I help you ?  
John Doe: I need help with my recent bill  
vinod: Can you provide more details ? account# and bill month ?  
John Doe: Sure, I believe both my equipment insurance and installment fee are charged even though they should have stopped prior to last month. So my issue

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 Netsuite 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 Netsuite from a separate browser and make a change from there.

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