NETSUITE Integration Guide

LiveEngage CRM Widget

by LivePerson, INC

last revised on: 2019-03-27

Table of Contents

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

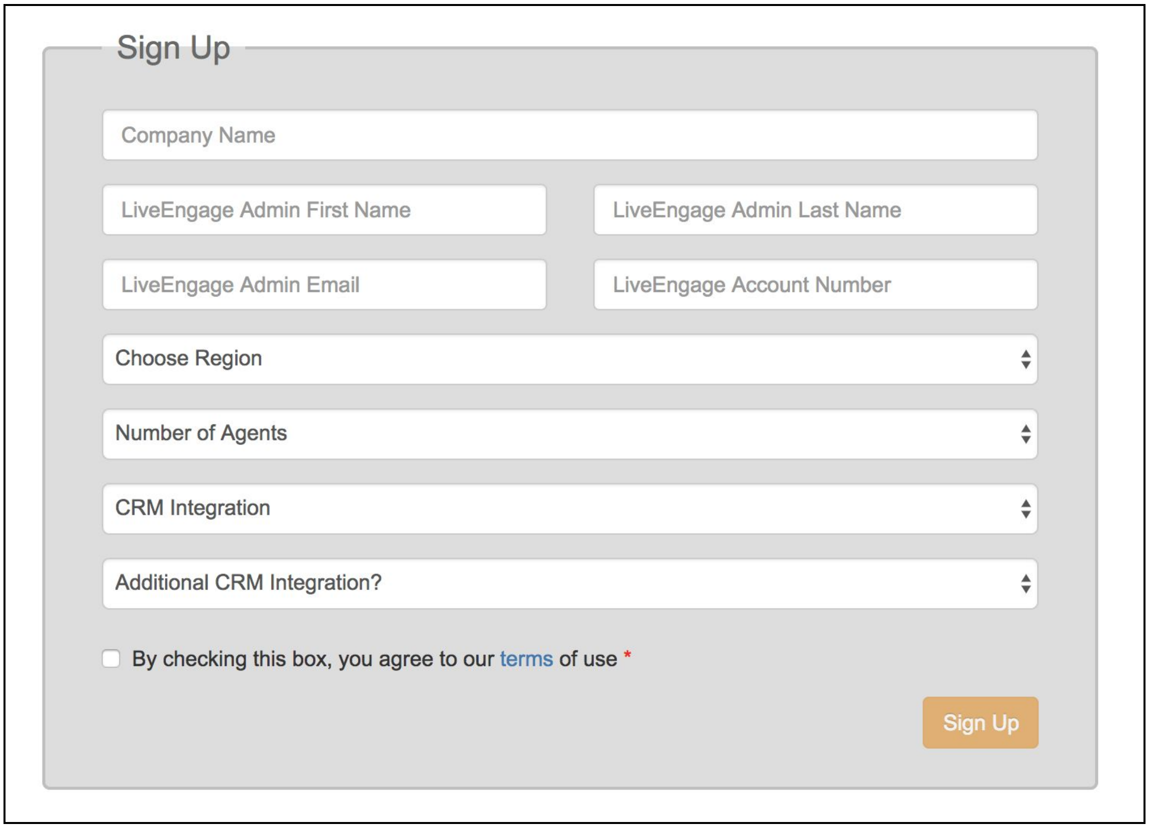
Below is an overview of the required widget settings:

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

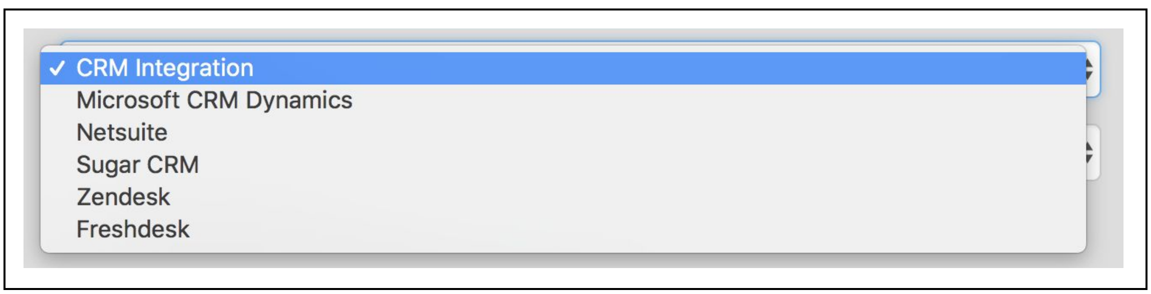
Widget Sign Up

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



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

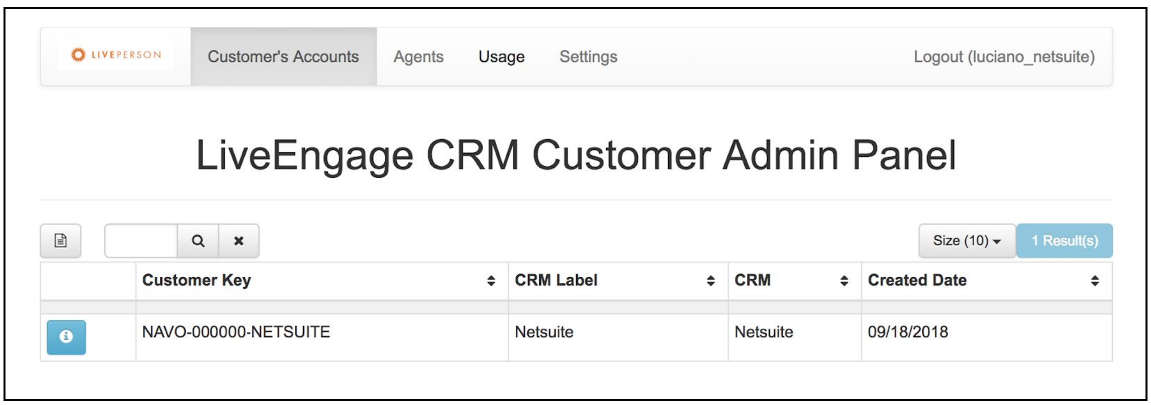
1. Make sure you receive the username and password from your Account Manager.
2. Go to the installation URL: https://lpcrm.fs.liveperson.com/admin-panel

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

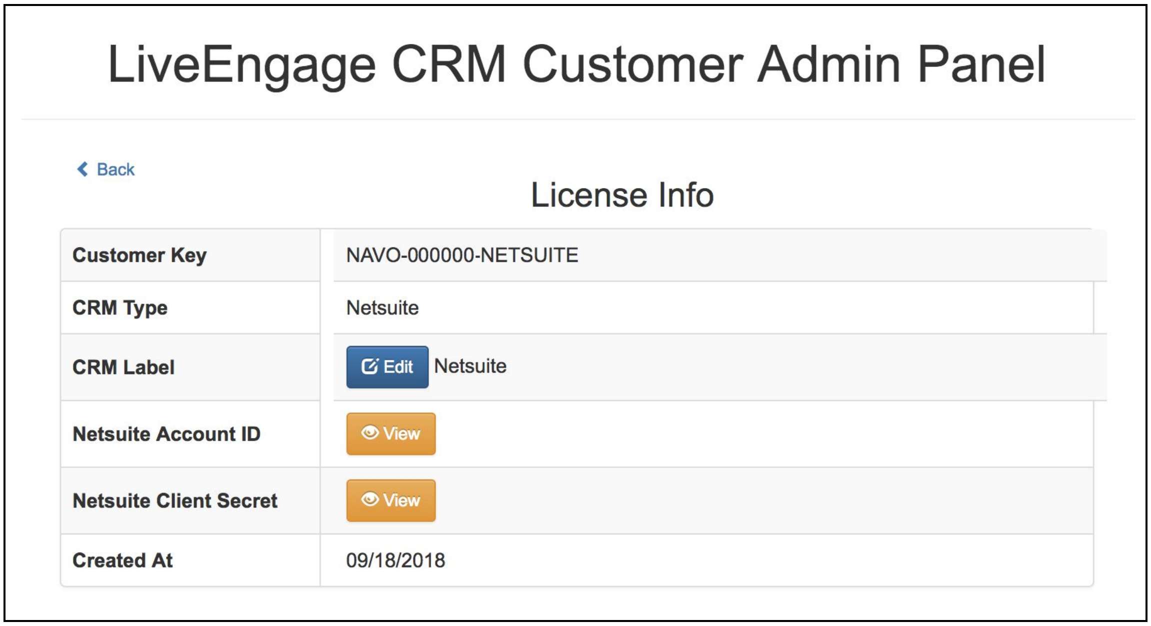


c. Click on the "info" icon next to the details of the customer key to modify connection to your CRM instance. Will be opened the License Info window.

License Info

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

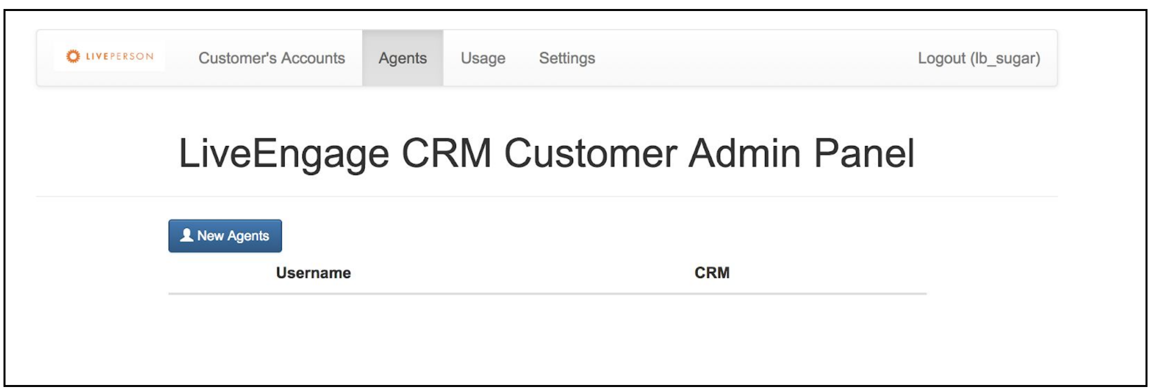
Here must be configures the connection to your CRM account. This is detailed in the next section Customer Accounts.



Agents (Deprecated)

Link: Admin Panel → Agents

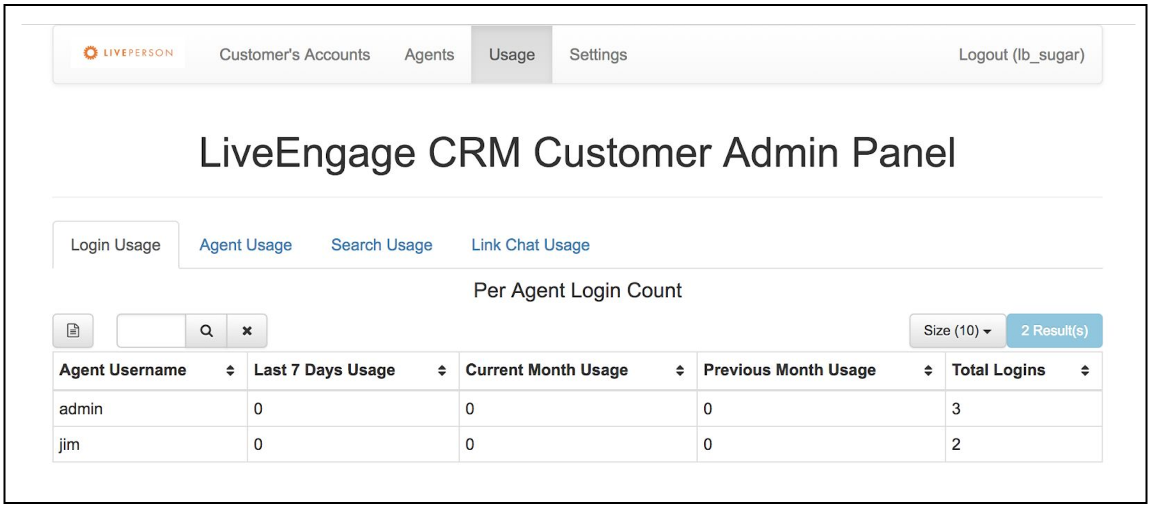
This session will not be addressed as it is deprecated



Usage

Link: Admin Panel → Usage

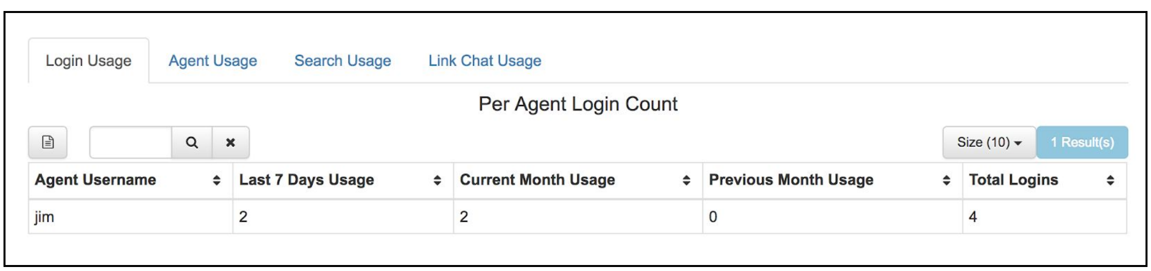
See the following usage statistics from the account:



Login Usage

See the login statistics from each Agent by:

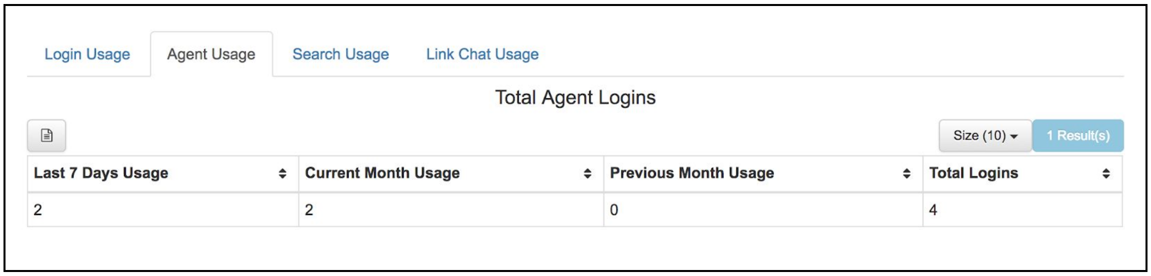
- Last 7 Days
- Currently Month
- Previous Month
- Total Logins



Agent Usage

See the login statistics from all Agents by:

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

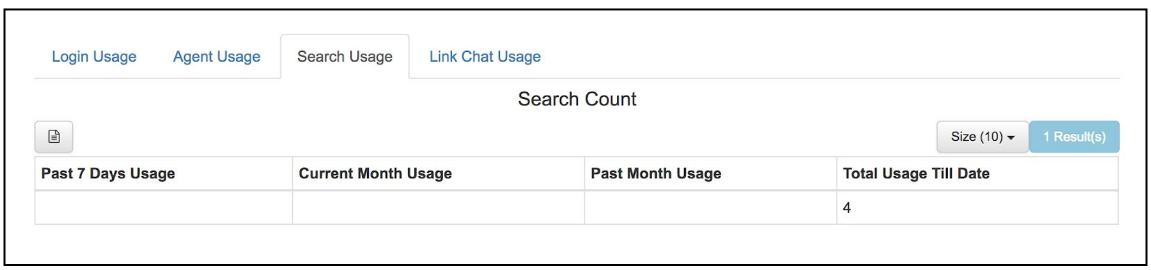


Last 7 Days Usage	Current Month Usage	Previous Month Usage	Total Logins
2	2	0	4

Search Usage:

See the search statistics from all Agents by:

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

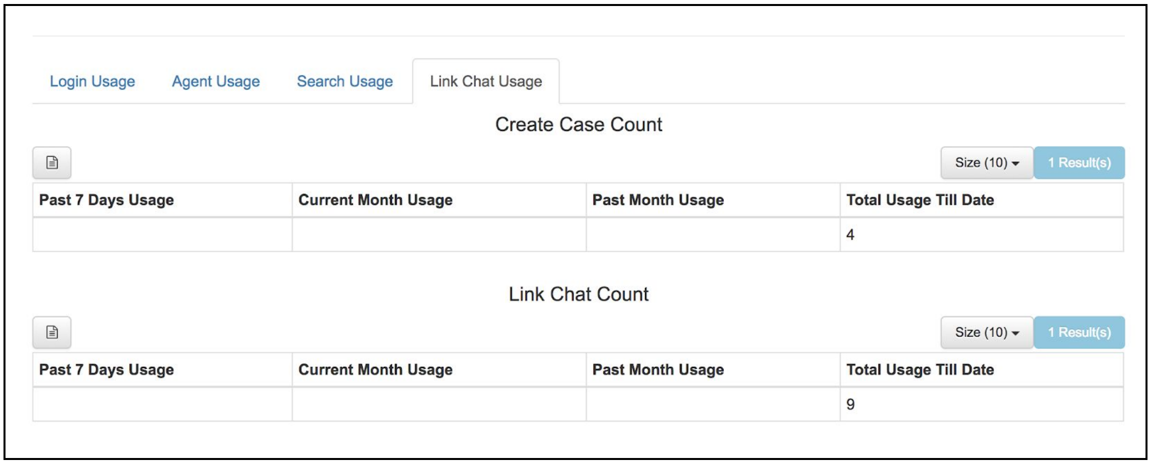


Past 7 Days Usage	Current Month Usage	Past Month Usage	Total Usage Till Date
			4

Link Chat Usage:

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

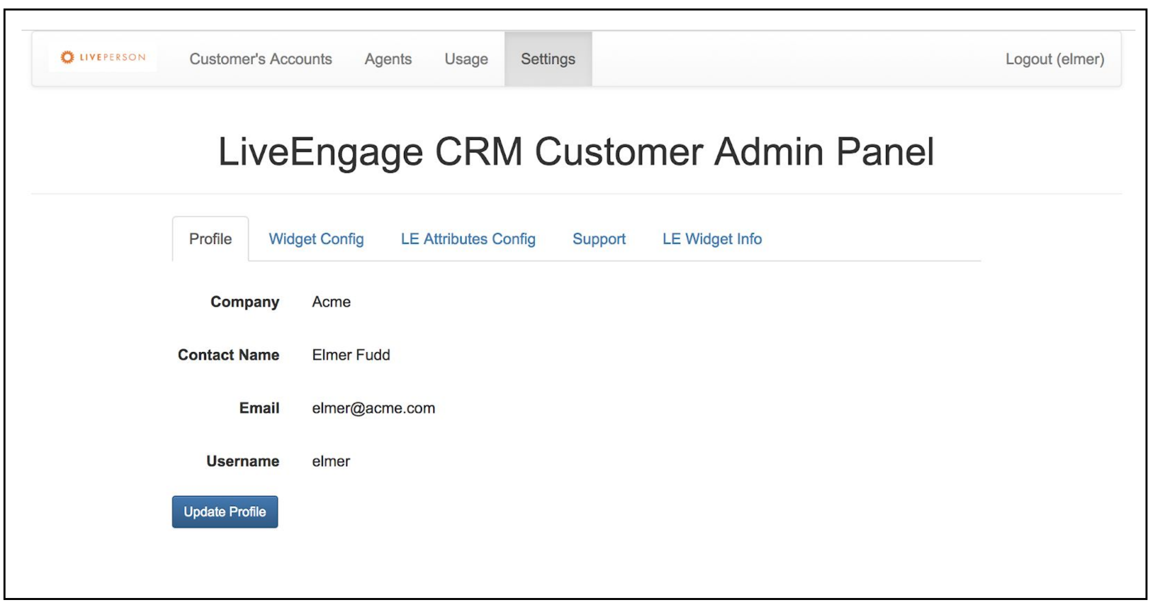
- Last 7 Days
- Currently Month
- Previous Month
- Total Usage Till Date



Settings

Link: Admin Panel → Settings

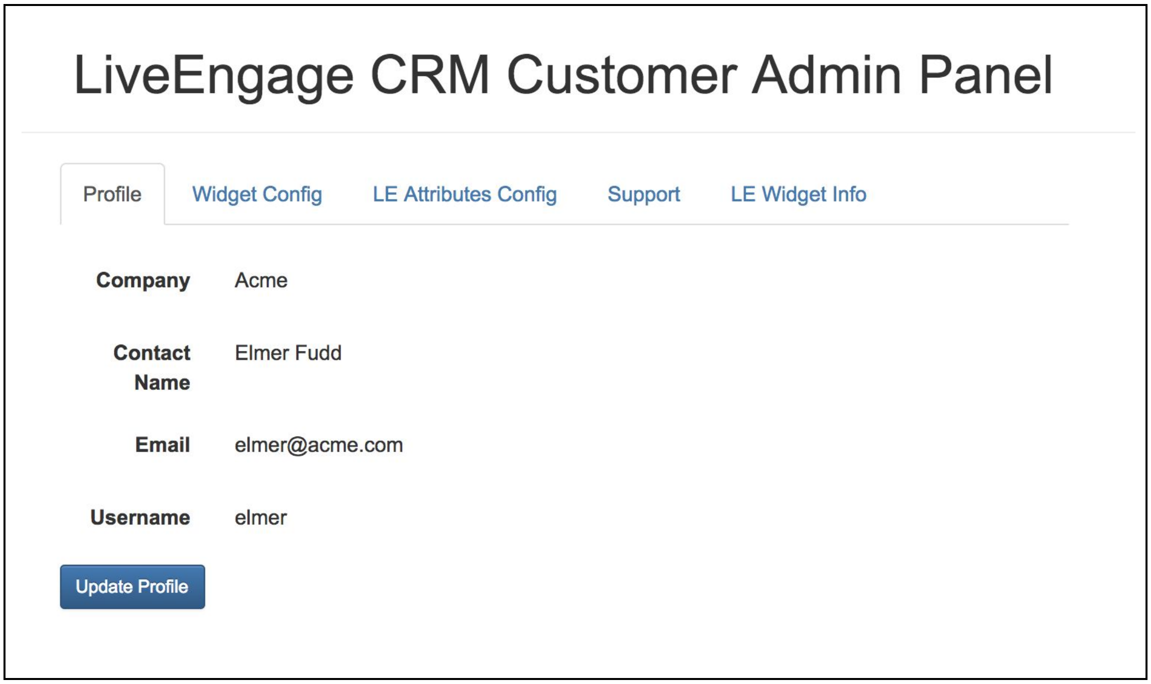
Here you can check and update your profile information.



Profile

Link: Admin Panel → Settings → Profile

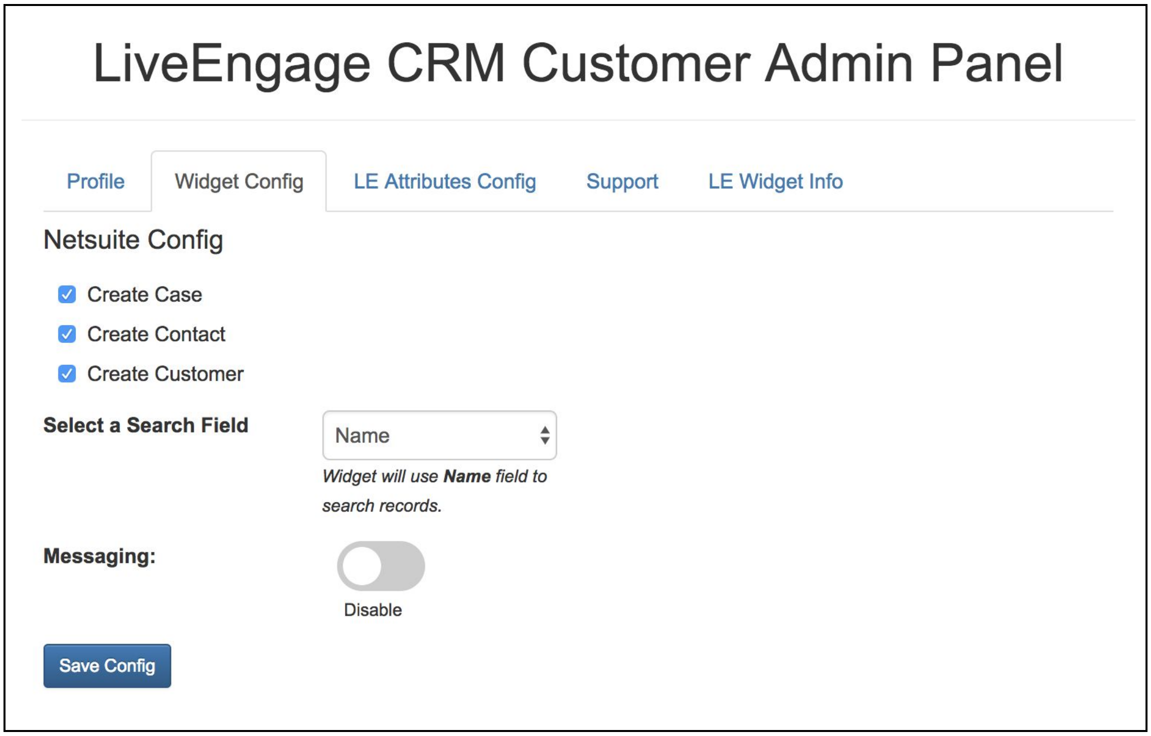
Here can verified your company profile information.
To update/change company profile information: Company Name, Contact Name, Email, Username, and Password.



Widget Config

Link: Admin Panel → Settings → Widget Config

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



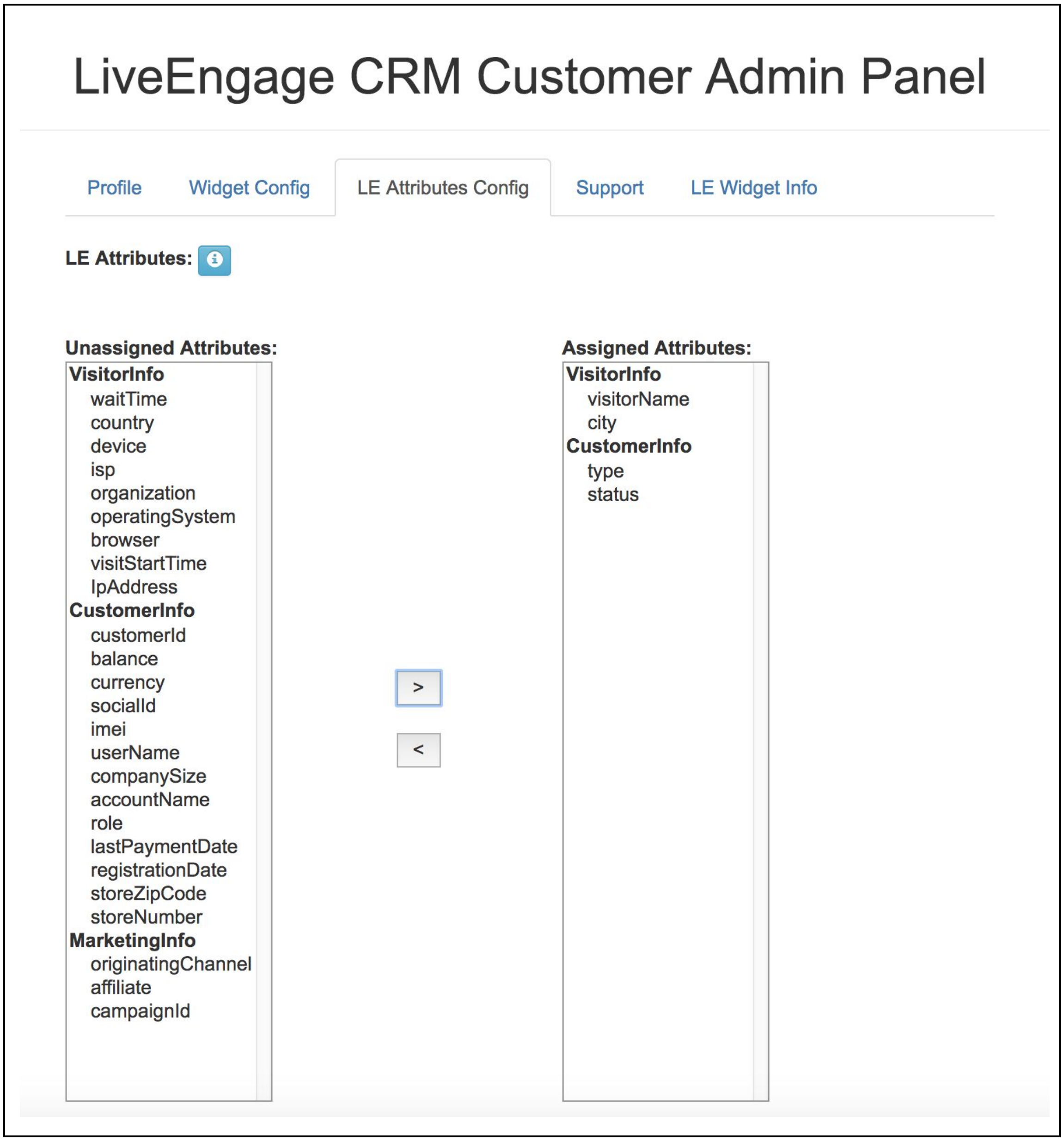
LE Attributes Config

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 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 < .

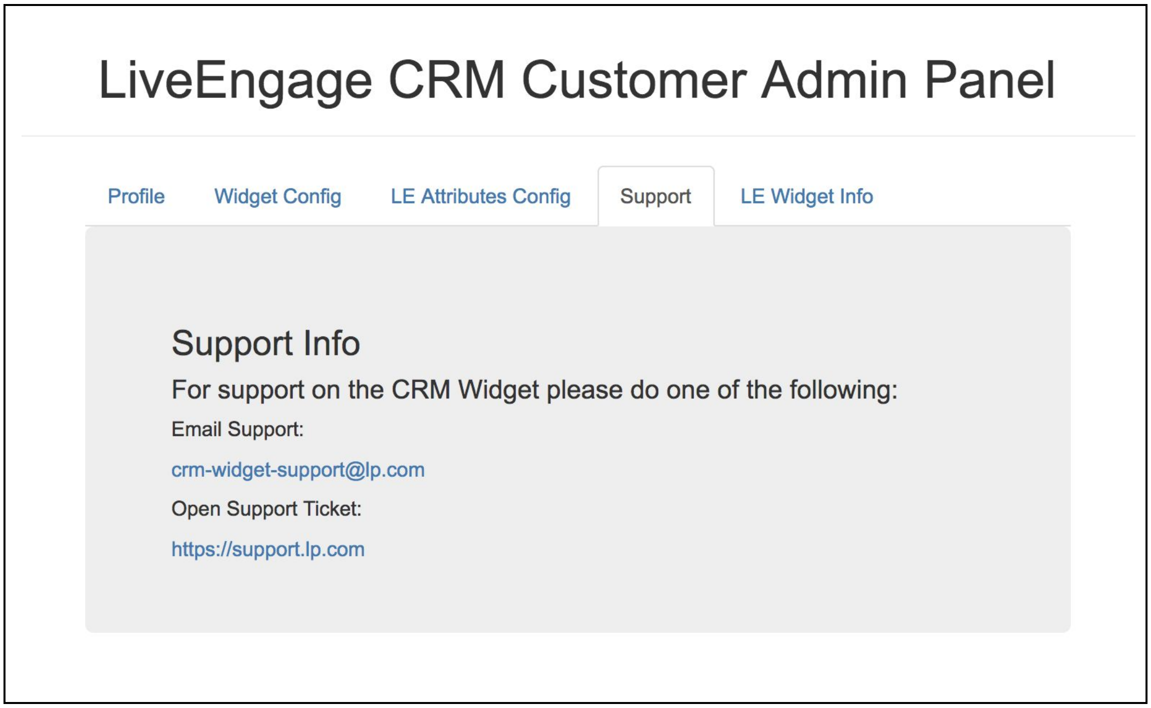
Note! For default, no one attribute is captured by Widget.



Support

Link: Admin Panel → Settings → Support

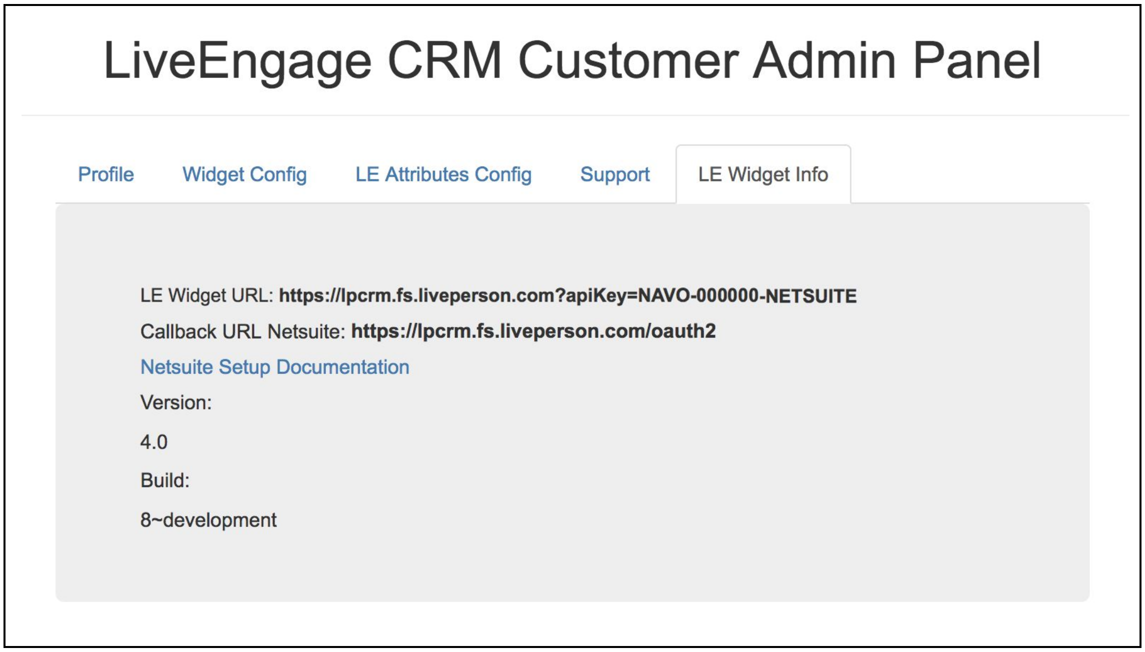
See support email and process to open a ticket for support.



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.

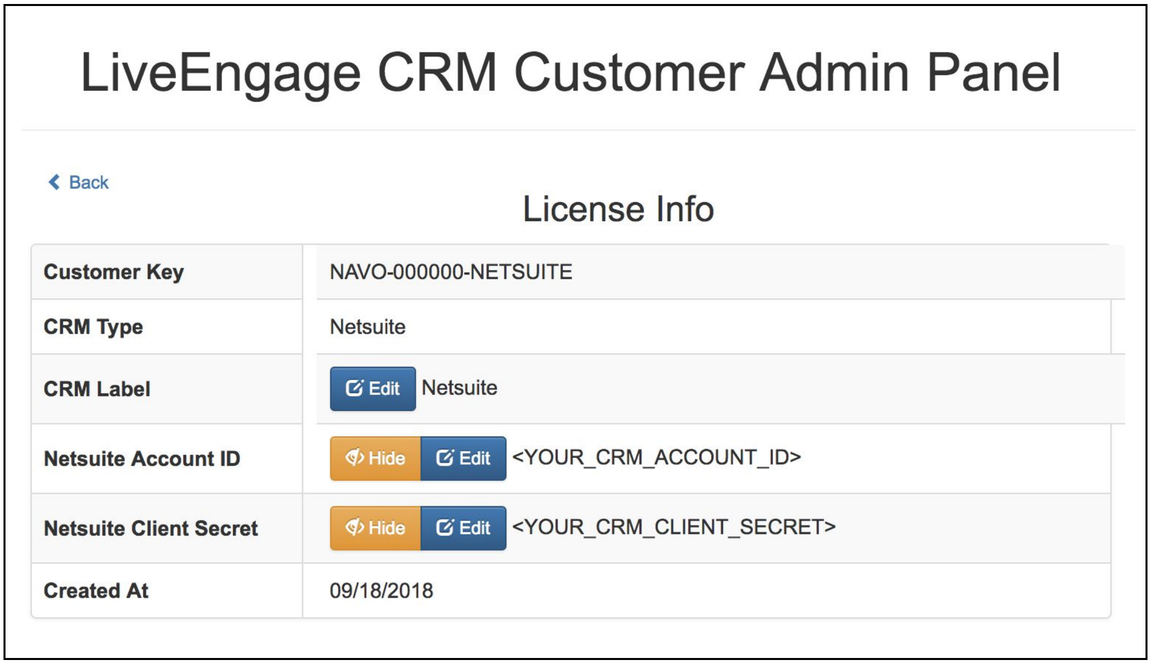


Customer Accounts

Link: Admin Panel → Customer's Accounts

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

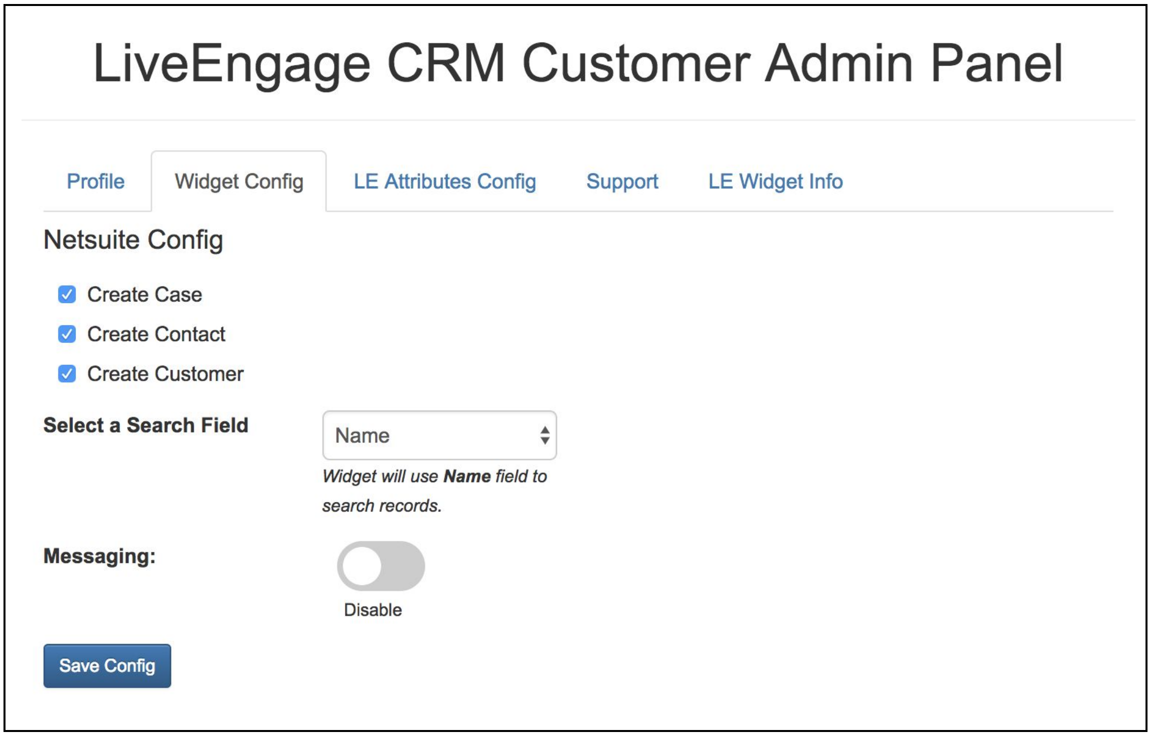
- Customer Key: This value is used to identify the license in the Live Engage.
- CRM Type: Which CRM is registered to this license.
- CRM label: Name to identify the current license.
- Netsuite Account ID: Account ID from Netsuite.
- Netsuite Client Secret: Client Secret from Netsuite.



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 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.

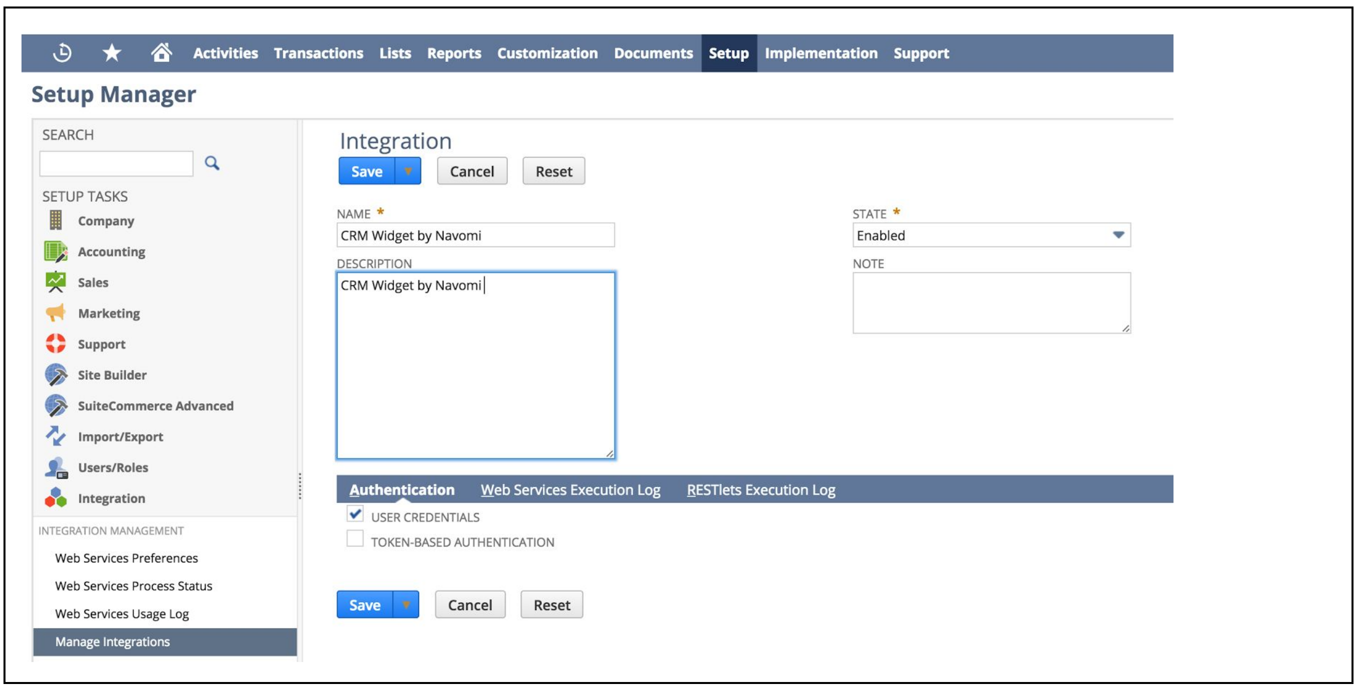
Create A New 'Web Service Integration' Entry

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

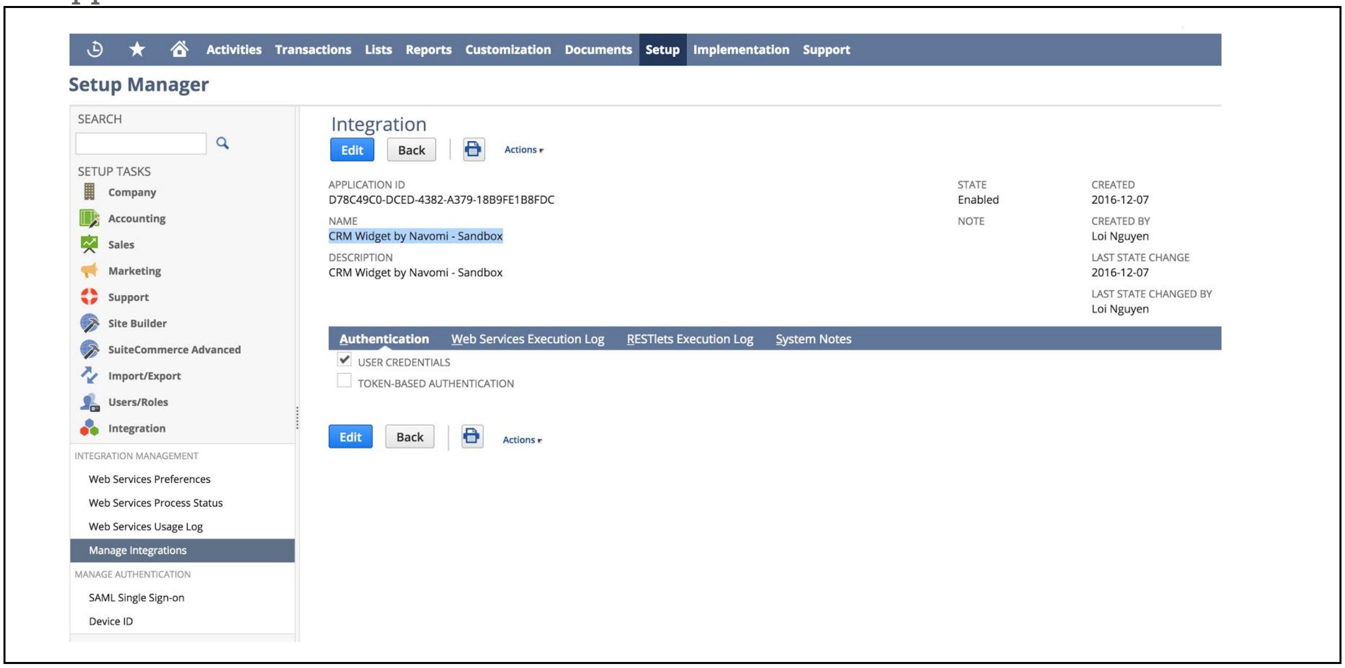
You will need to enter the following information, as shown in the image below:

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



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

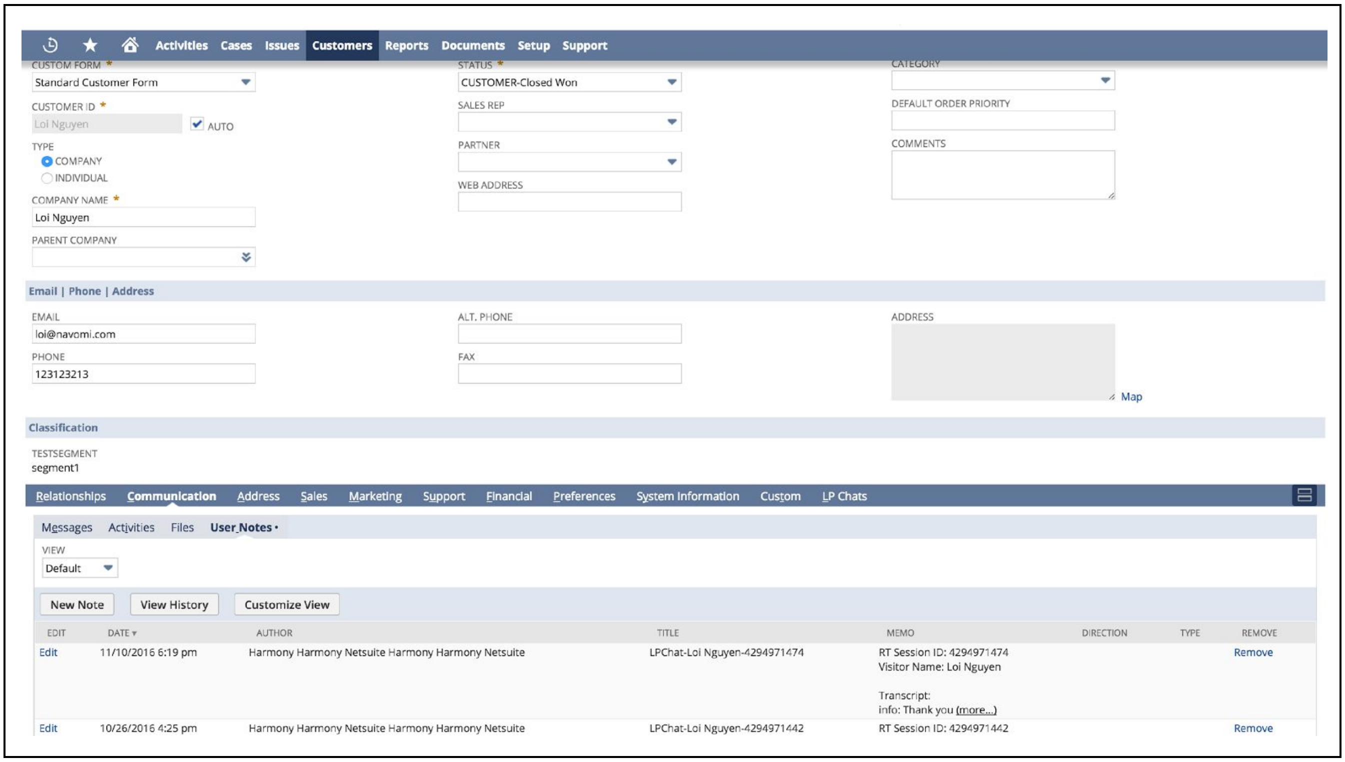
Since the CRM Widget will store chat transcripts within a Note object, the NetSuite Administrator must ensure that “Communication” “Note” is made available in the “Entry Forms”. If you use the standard Entry Forms, no further configuration is required. The chat transcript will be available under “Communication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

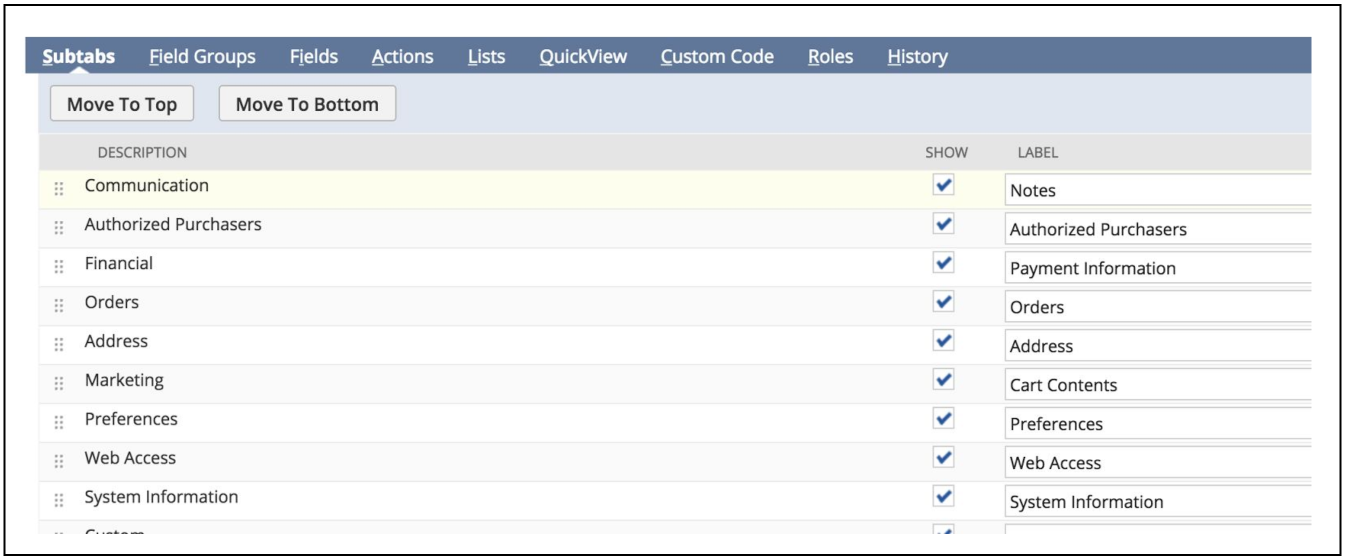
4. Then select "Entry Forms”
5. Once in “Entry Form” click on "Edit" on the Customer form currently being used:



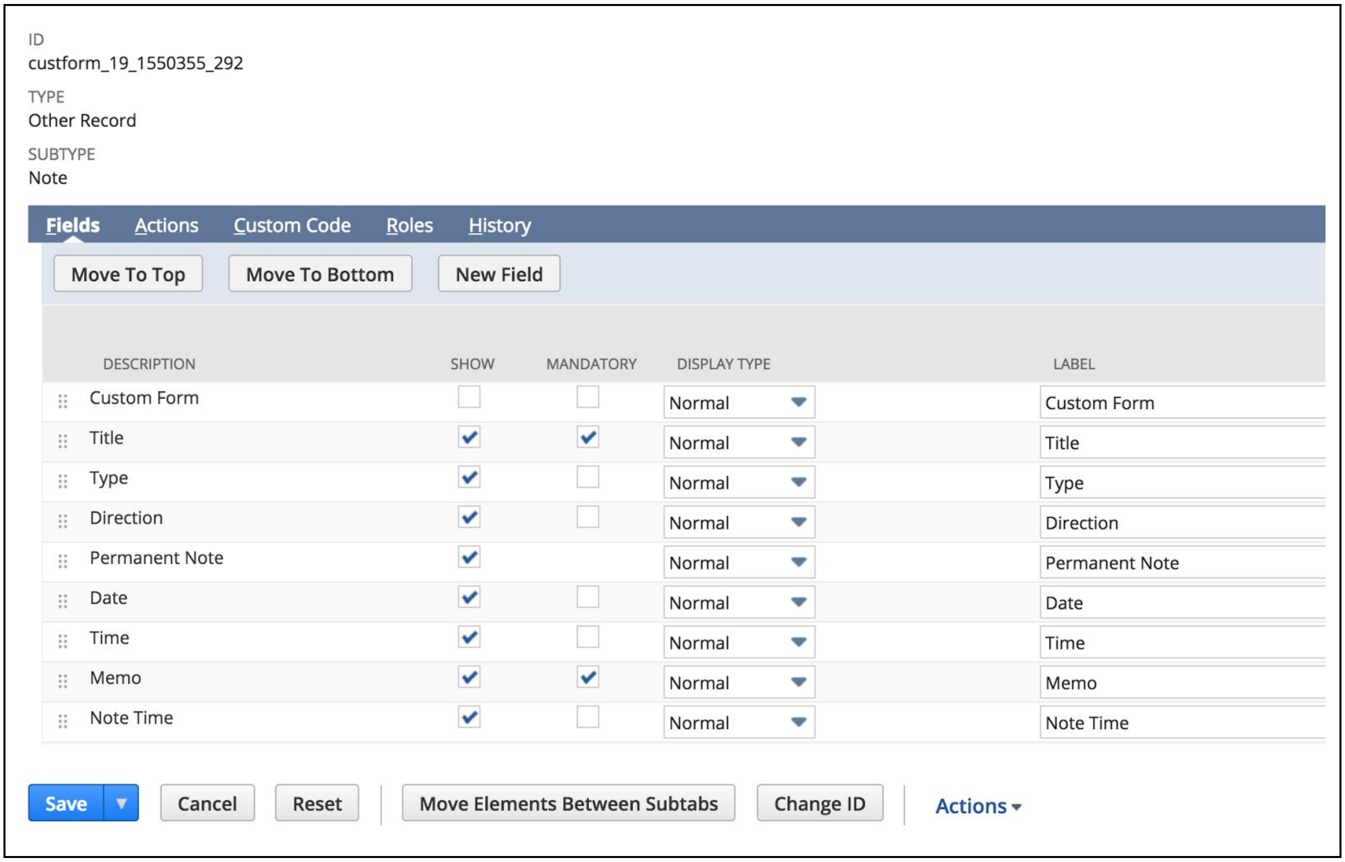
However, if you use customized Entry Forms, you will need to edit it and include Communication Notes there.

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.



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.



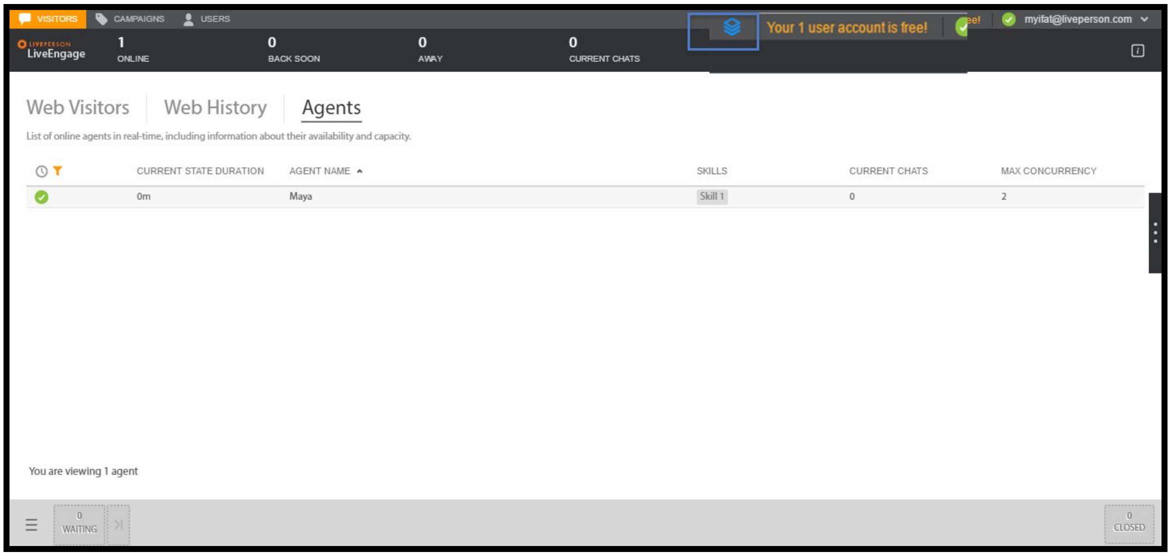
Note! In the event that the Netsuite Admin is not able to find or select the Communication Notes, please contact NetSuite Support or NetSuite Account manager to get access.

Adding Widget in LiveEngage Console

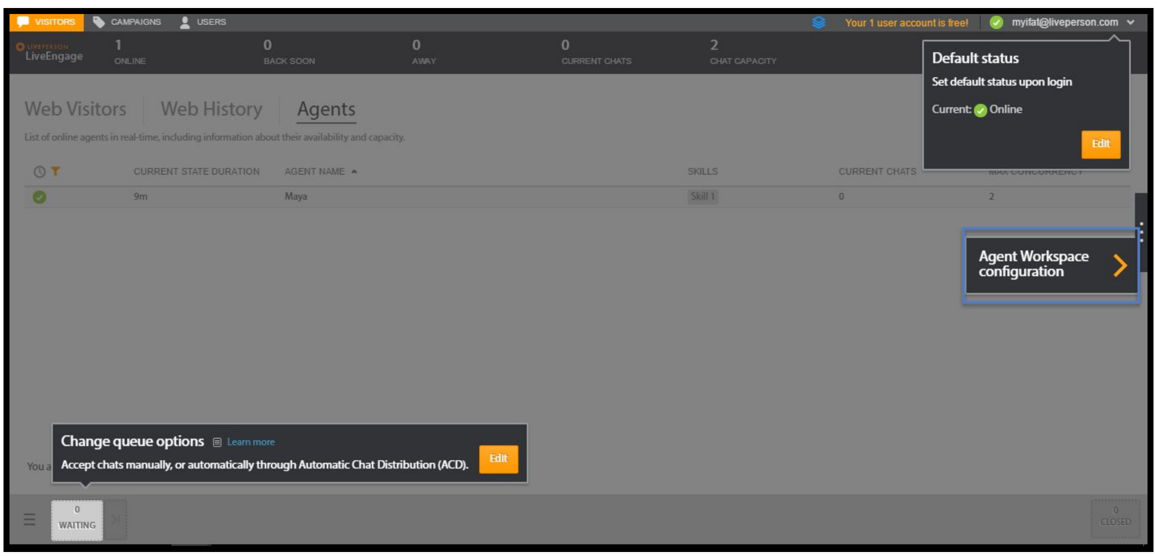
Now that you've updated the CRM Widget profile and license information, it is time to go to LiveEngage and configure the widget.

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

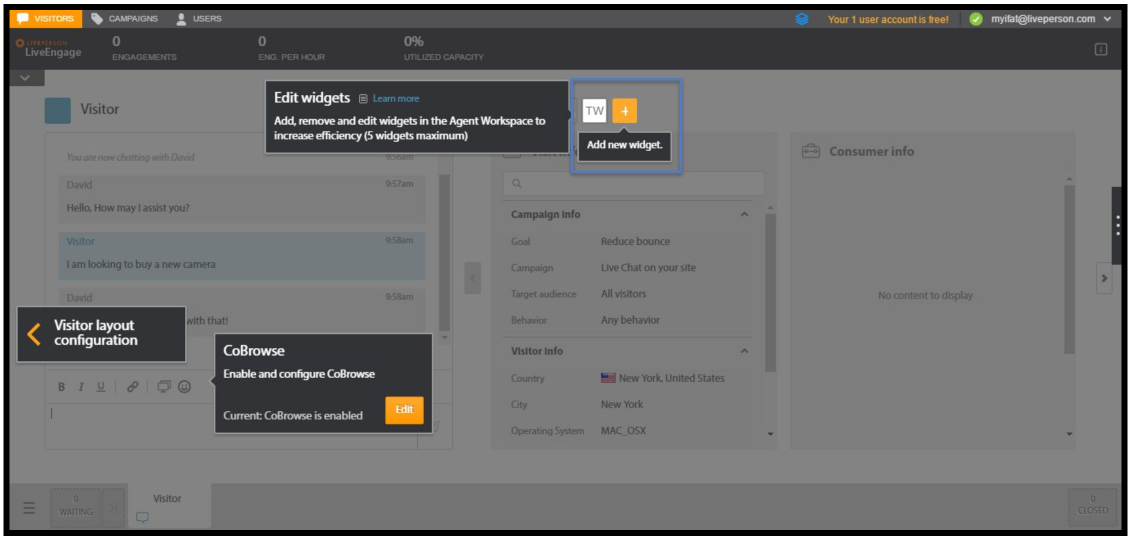
1. Access "Night Vision" settings menu: click on the icon on the top right of your screen as shown in the screenshot below:



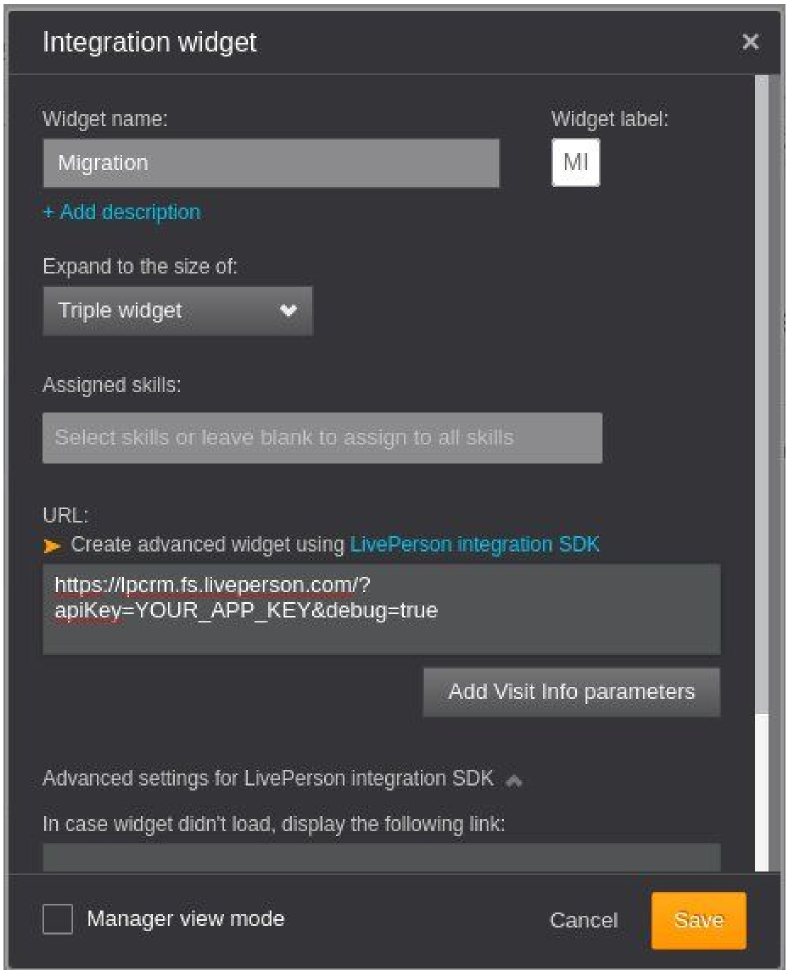
2. Once in Night Vision, click on “Agent Workspace Configuration”



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



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”



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 NETSUITE.

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

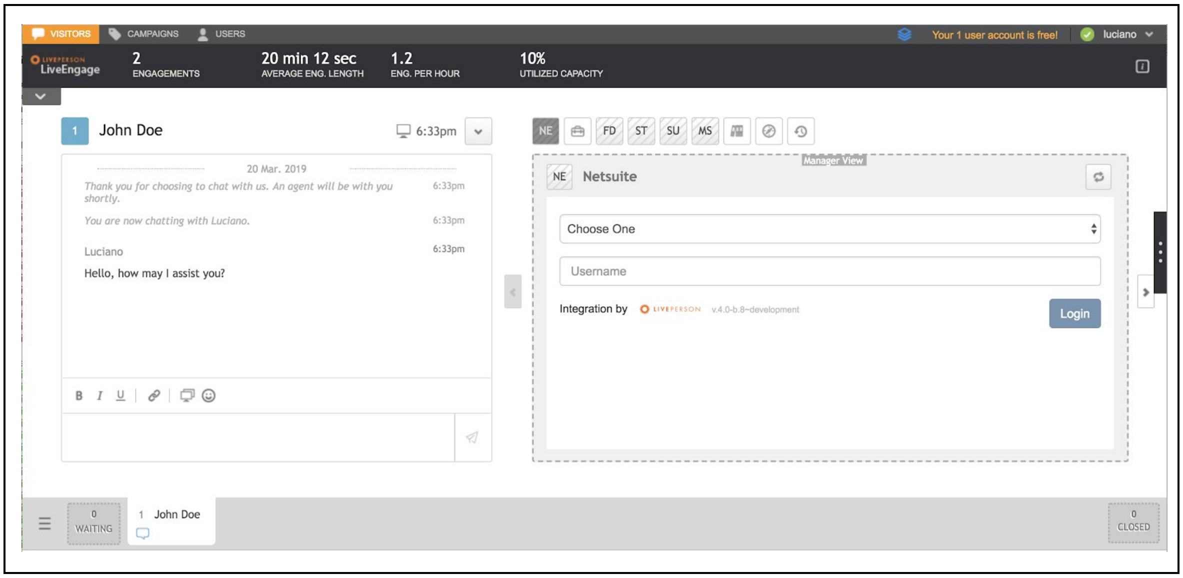
Overview

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

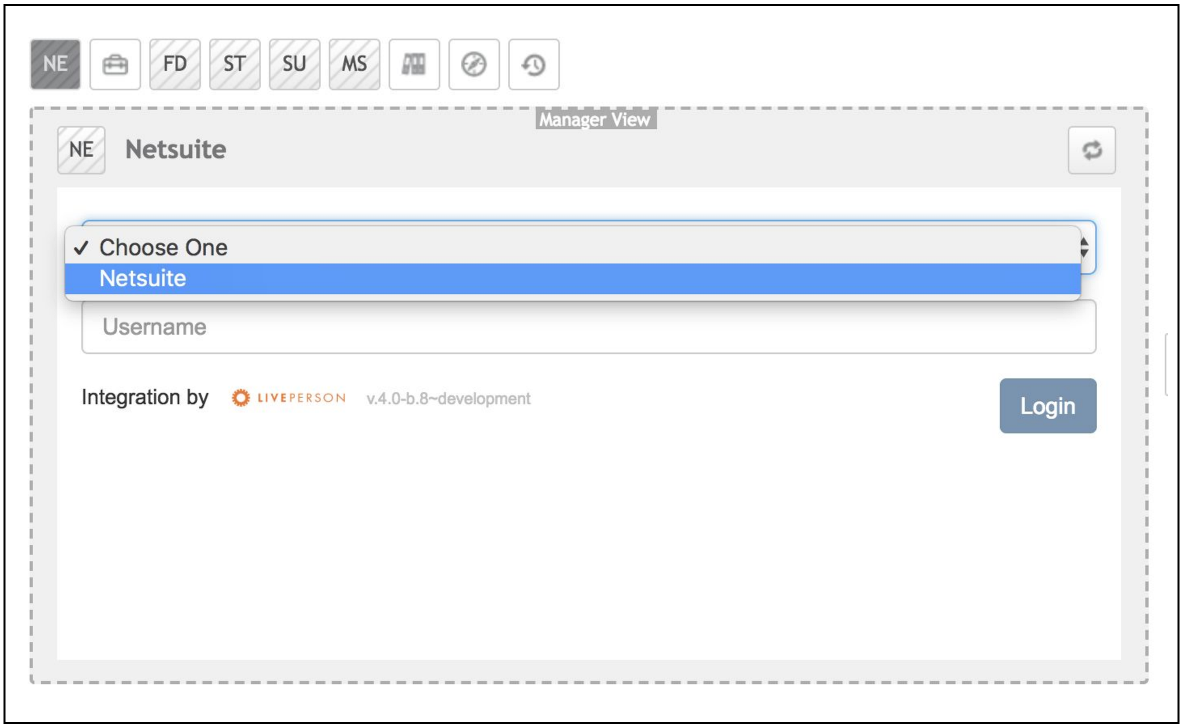
To start working on the new widget, accept a chat, click on "Netsuite" widget, login and you can view Contacts and Leads and create Accounts, Leads, Contacts and Cases directly in LiveEngage.



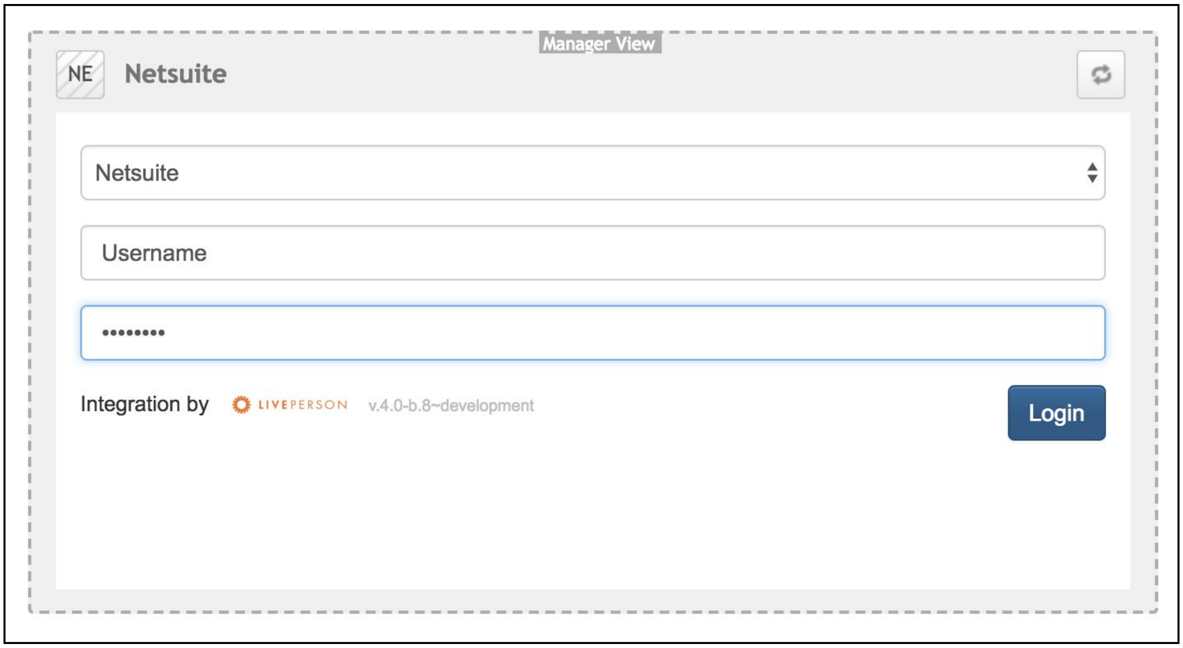
Login Widget

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

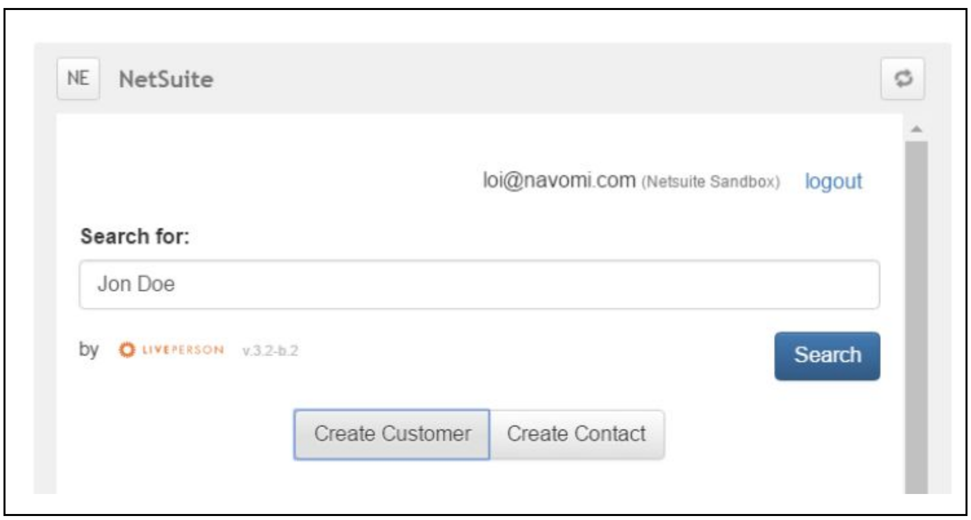
Select registered CRM:



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

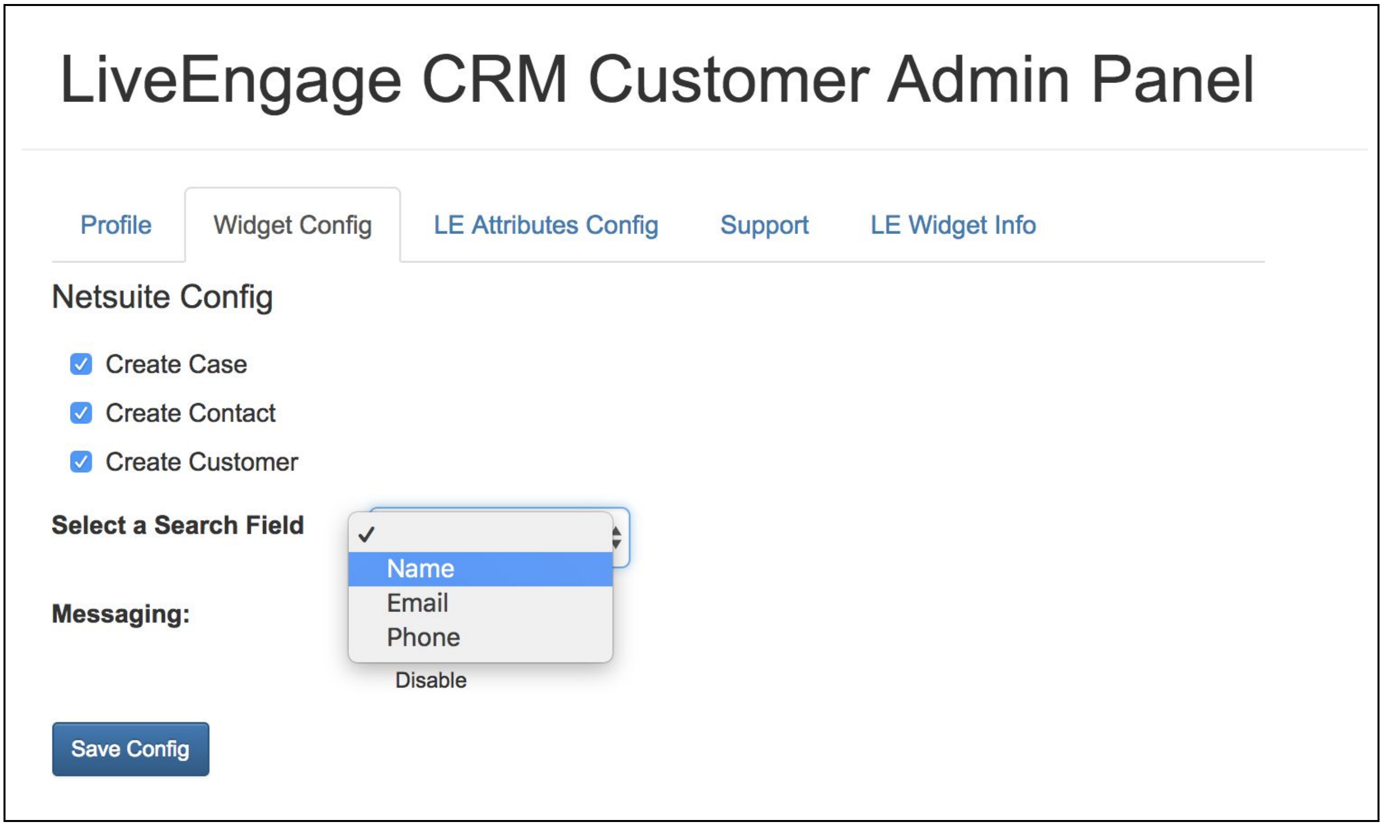
Note! If you have a visitor name in your pre-chat survey, the visitor name value will be automatically populated in the search string and the search will be performed once you click on the widget icon.

Search Records Filter/Fields

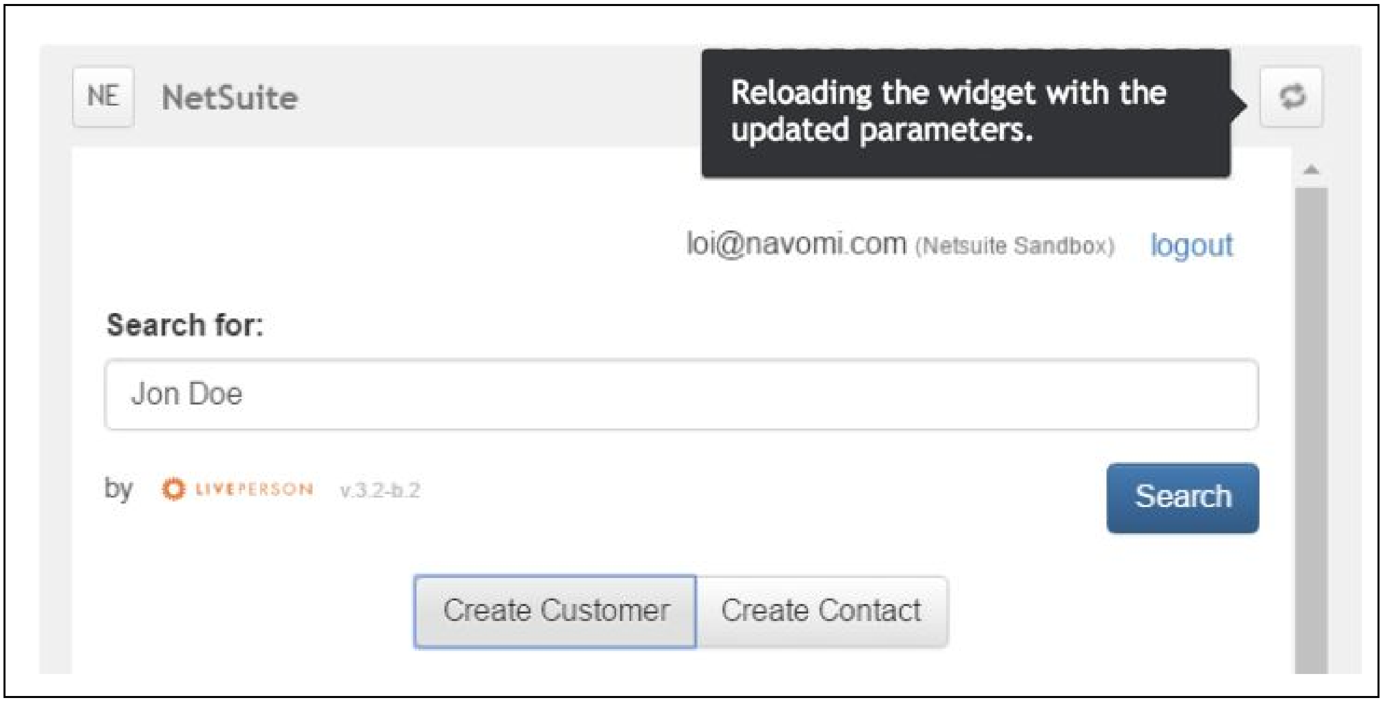
For Netsuite there are options to filter searches by:

- 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.

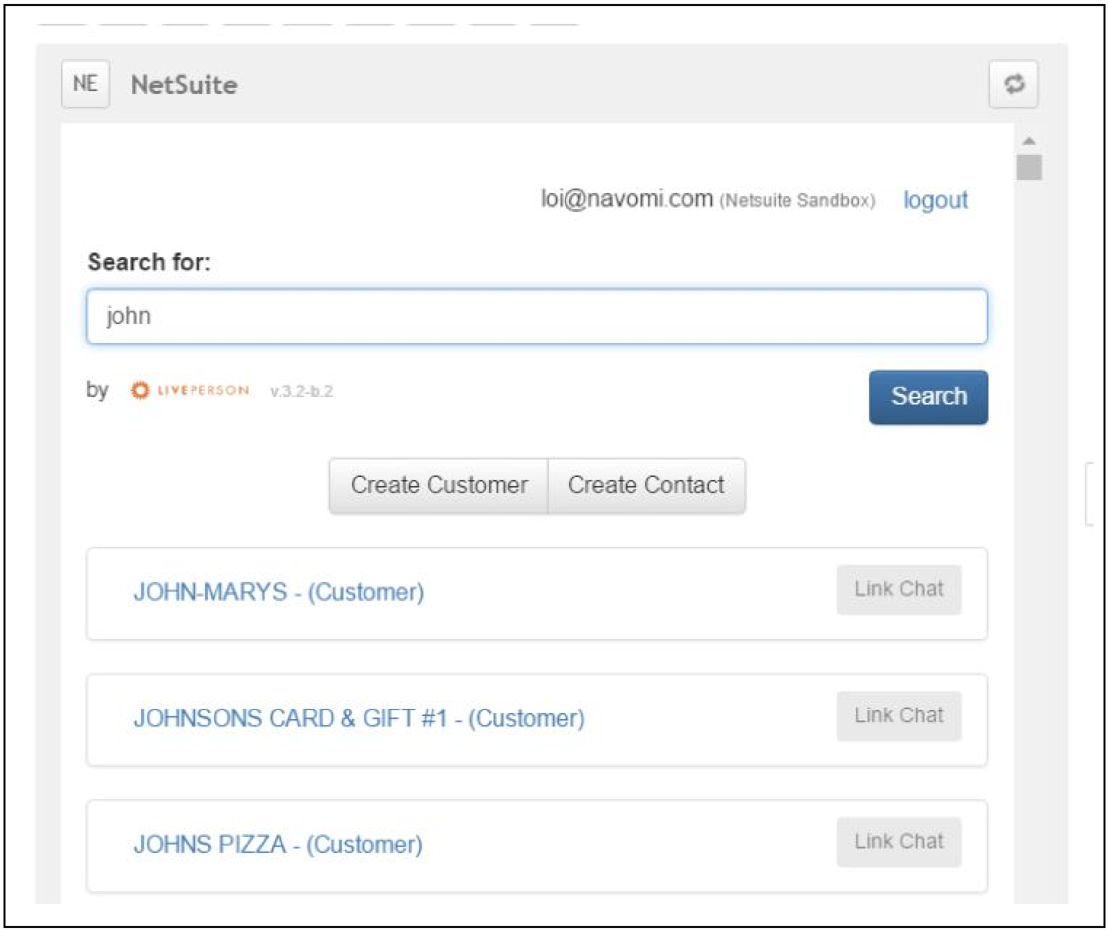


For new settings to take effect, you need to reload the widget in Live Engage. To do this, just click on the icon at the top of the widget on the right:



View Records

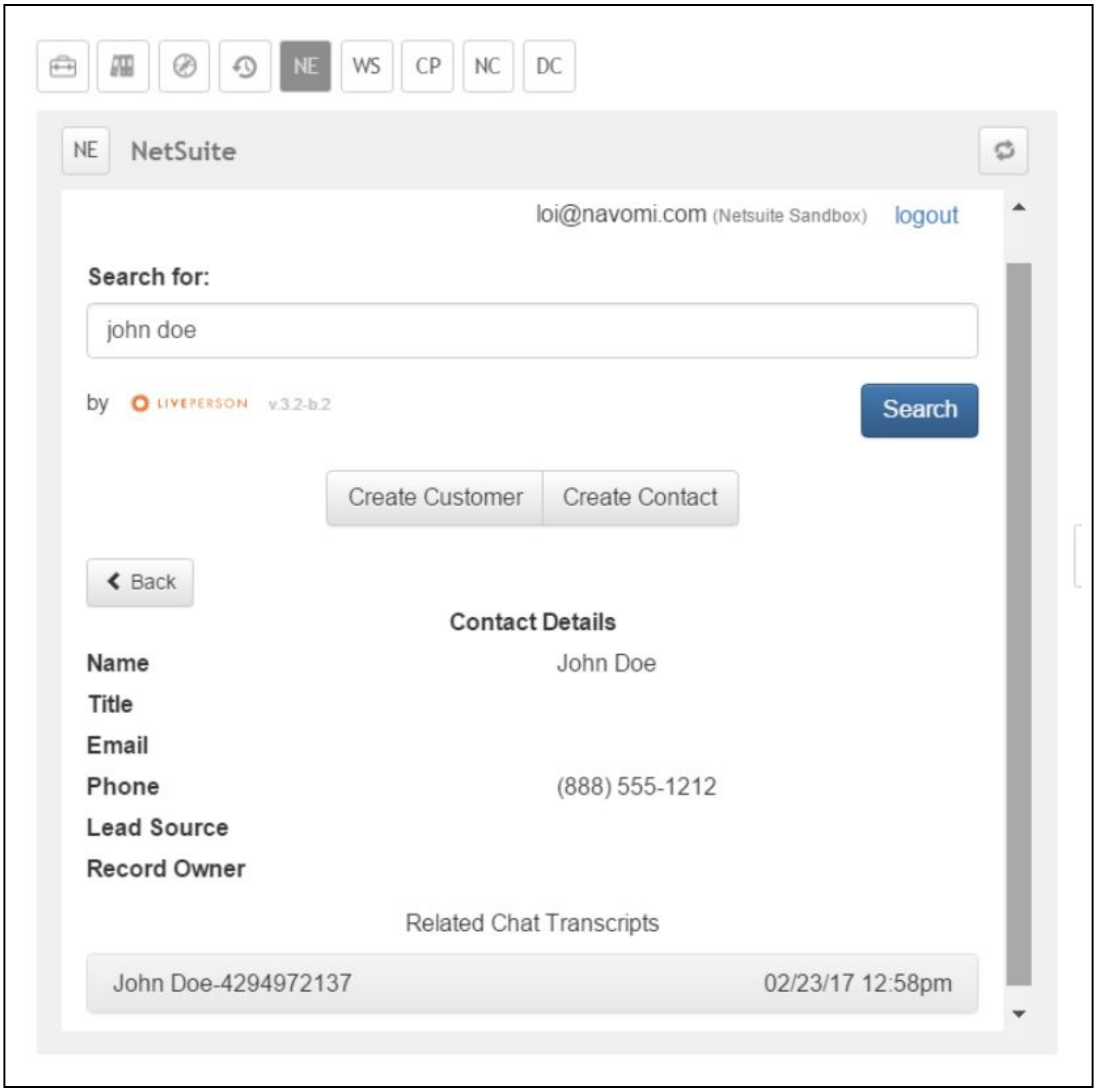
Here is a sample listing of search records. In this case, the search is configured with the filter by NAME, and all data that has the search field value as part of the data are listed. Beside the value of each data, in parentheses one can observe the type .



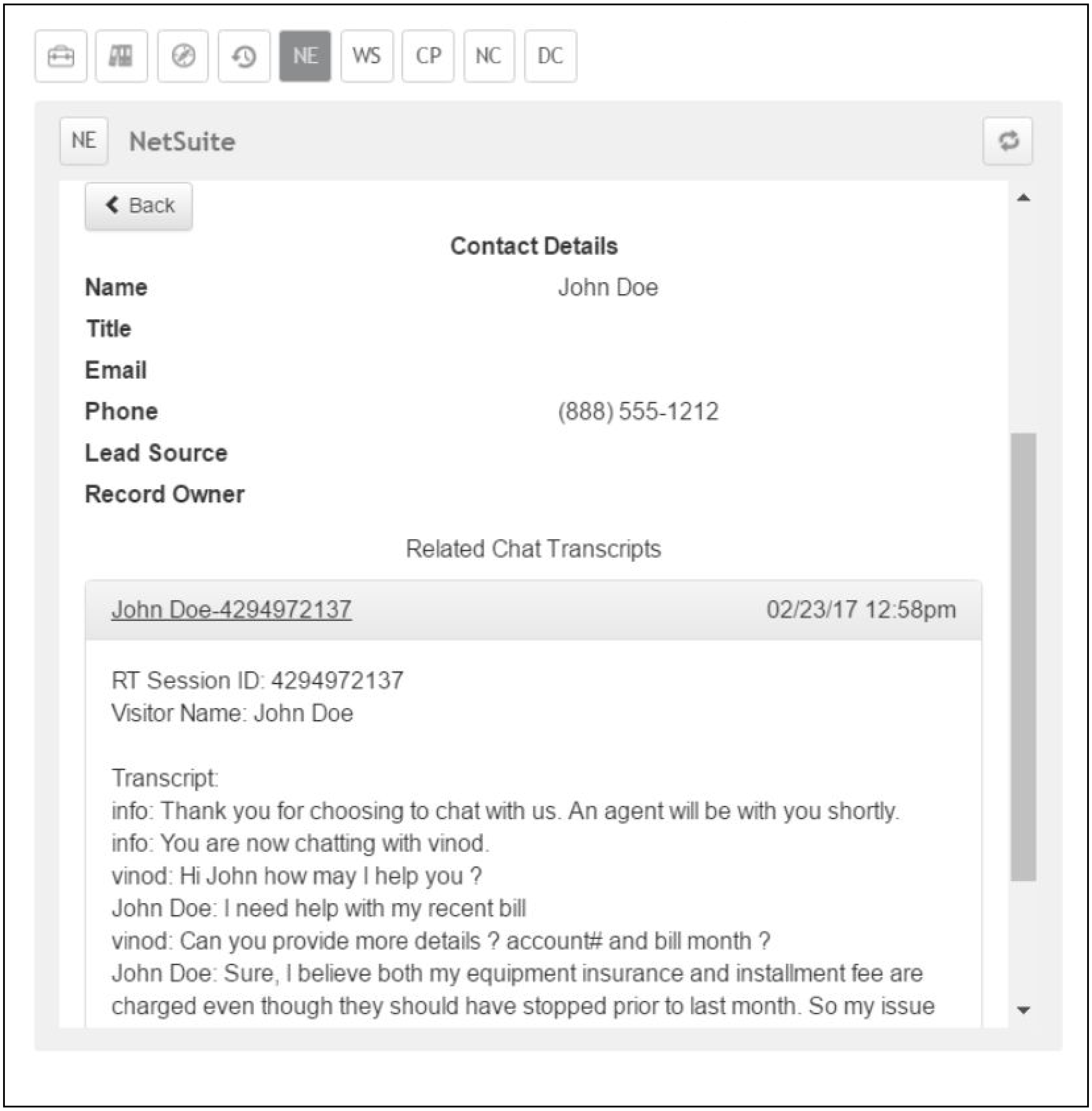
Clicking will display the item details. Here is an example of CONTACT:

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:

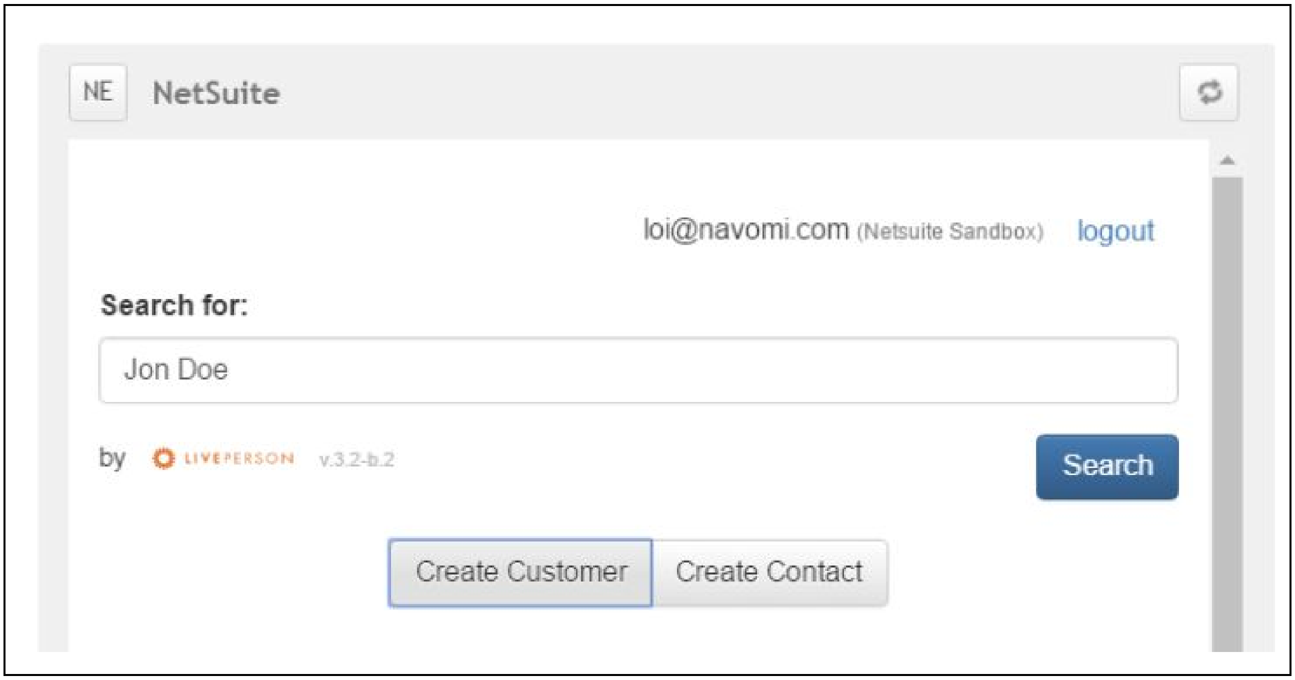


This is Out of Box. Custom storage of Transcript are subject to be discussed

Create New Records

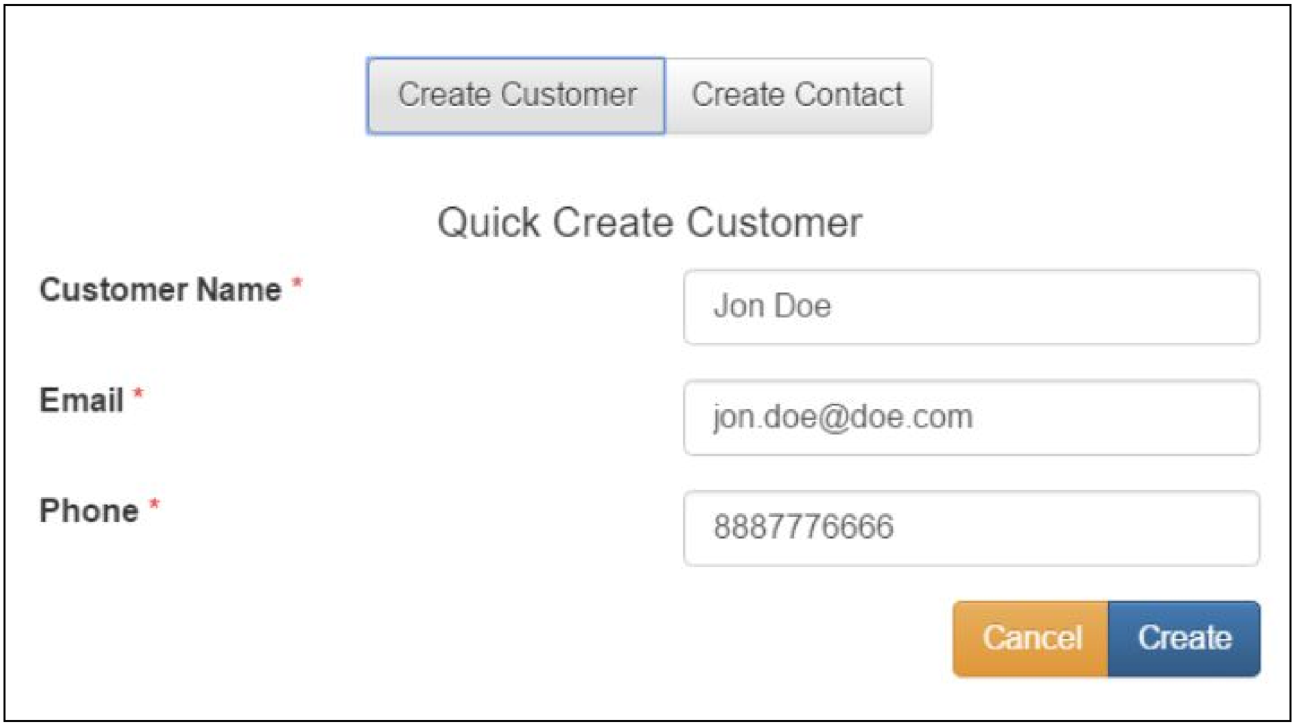
The Netsuite provide the following features:

- Create Customer
- Create Contact



Create Customer

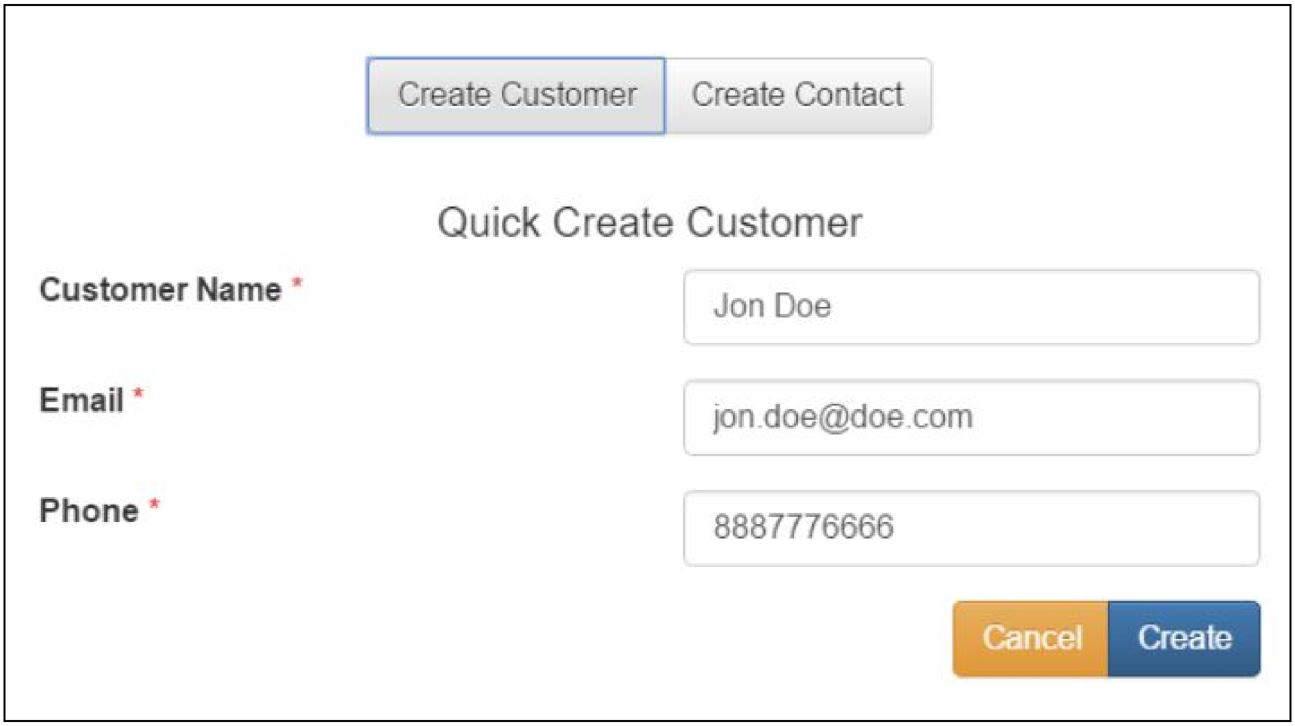
Click on "Create Customer" button and fill out the relevant fields and click on "Create". Some of the field values are automatically copied over from pre-chat survey, if the user fill out one before initiating the Chat.


Create Customer
Create Contact
Quick Create Customer
Customer Name *
Jon Doe
Email *
jon.doe@doe.com
Phone *
8887776666
Cancel
Create

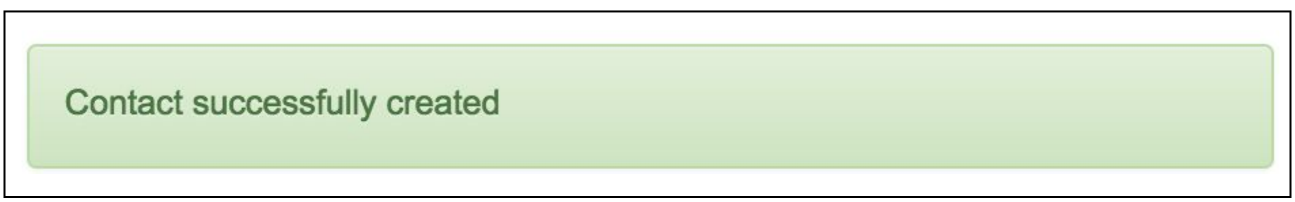
Create Contact

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.



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



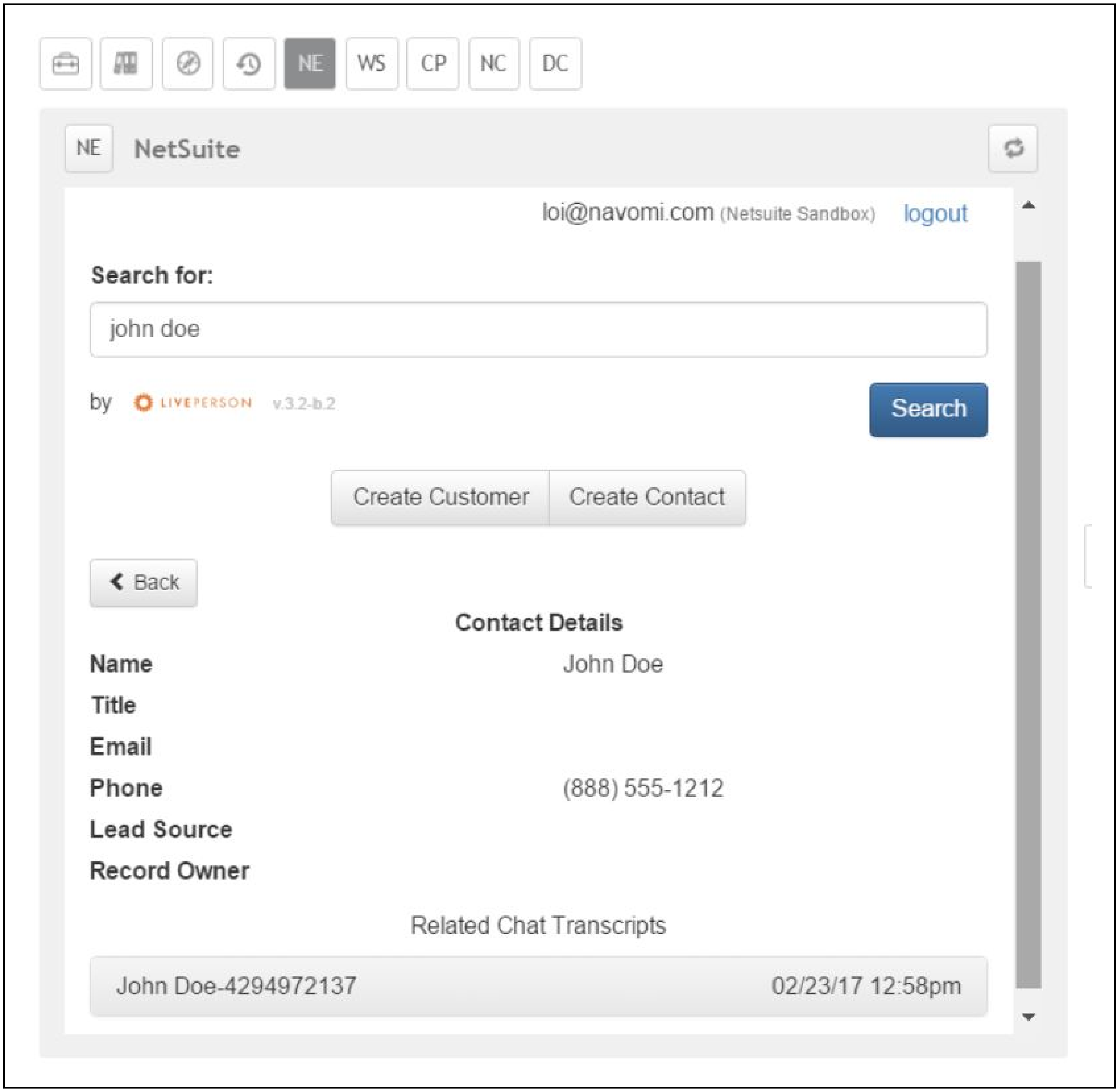
Link Chat Transcripts to Entity

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

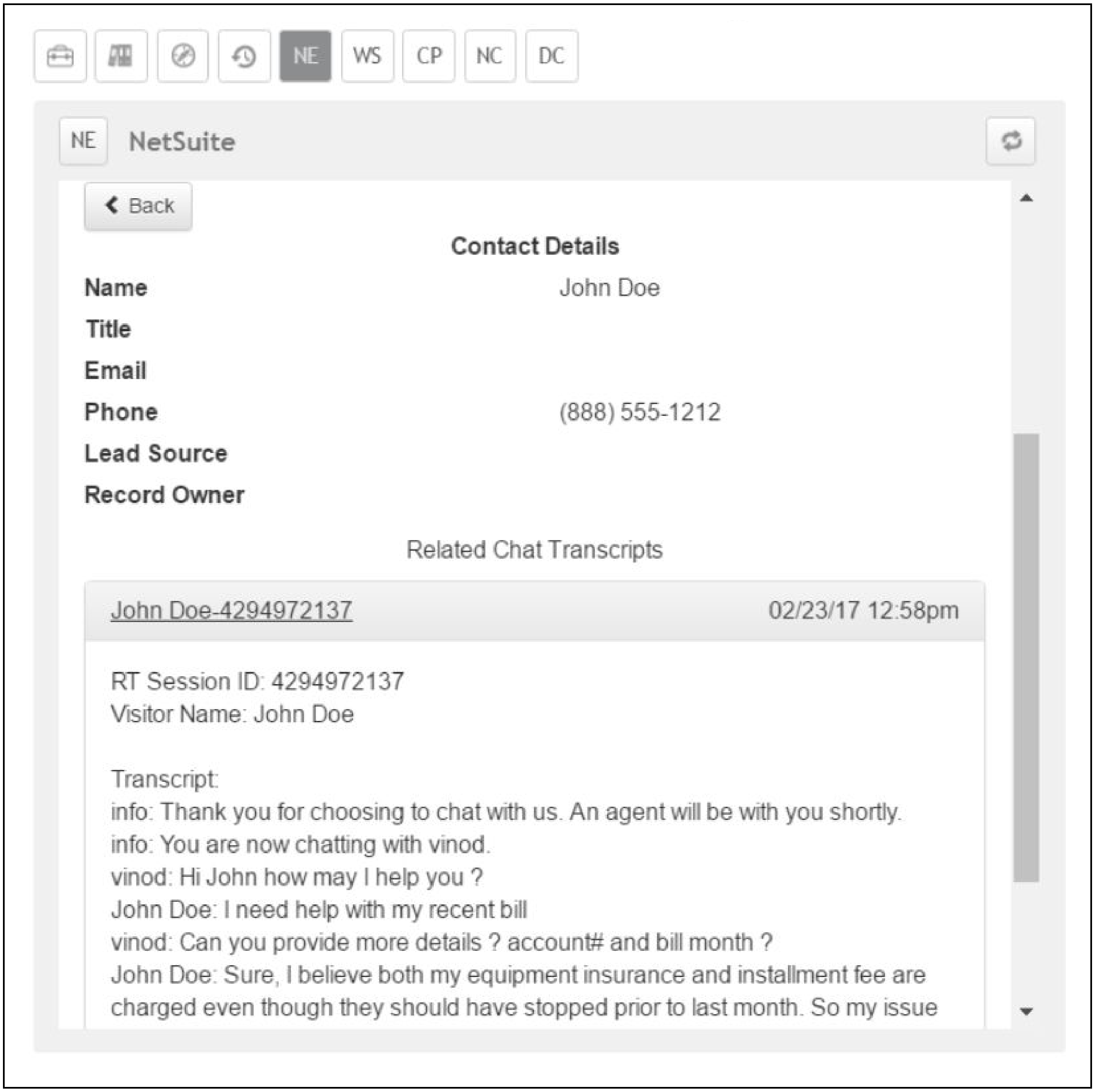
- You can attach a current chat transcript to a Netsuite record by clicking on the "Link Chat" button once the session has ended.

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:


NE
WS
CP
NC
DC
NE
NetSuite
Back
Contact Details
Name
John Doe
Title
Email
Phone
(888) 555-1212
Lead Source
Record Owner
Related Chat Transcripts
John Doe-4294972137
02/23/17 12:58pm
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.