

SUGARCRM Integration Guide

LiveEngage CRM Widget

by LivePerson, INC

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Version Management

Date	Version	Owner	Change History
	1.0		Full Final Document
11/12/2018	1.1	Luciano Buhler	Update links and references
03/20/2019	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 SugarCRM Widget. The LiveEngage SugarCRM 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 or Messaging

Set Up Guide

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

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 SugarCRM.

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

The screenshot 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 screenshot shows the 'CRM Integration' dropdown menu 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>, 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

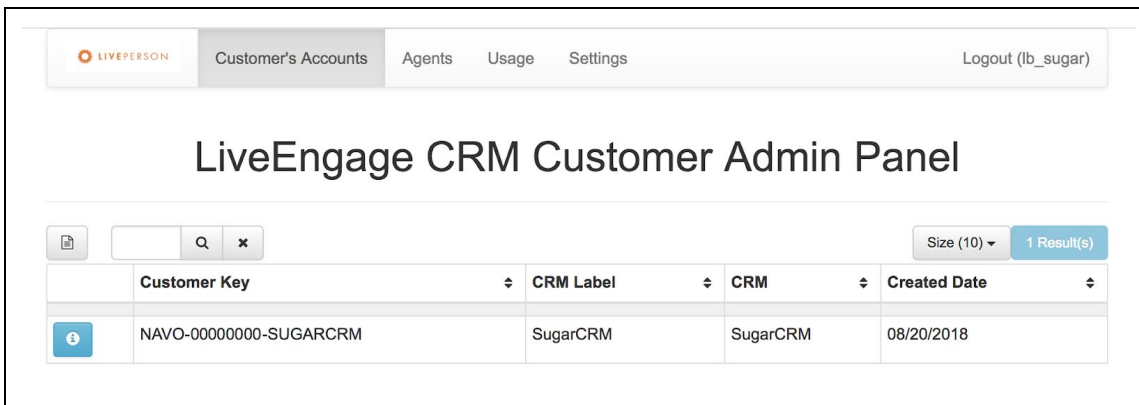
1. Make sure you receive the username and password from your Account Manager.
2. Go to the installation URL: <https://lpcrm.fs.liveperson.com/admin-panel>

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 'LIVEPERSON' logo, 'Customer's Accounts' (selected), 'Agents', 'Usage', 'Settings', and a 'Logout (lb_sugar)' button. Below the navigation bar, the title 'LiveEngage CRM Customer Admin Panel' is displayed. A search bar with a magnifying glass icon and a close button is present. To the right of the search bar, there is a 'Size (10)' dropdown and a '1 Result(s)' button. Below these elements is a table with the following columns: 'Customer Key', 'CRM Label', 'CRM', and 'Created Date'. The table contains one row with the following data: 'NAVO-00000000-SUGARCRM', 'SugarCRM', 'SugarCRM', and '08/20/2018'. An 'info' icon is visible in the first column of the row.

Customer Key	CRM Label	CRM	Created Date
NAVO-00000000-SUGARCRM	SugarCRM	SugarCRM	08/20/2018

- 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 next section [Customer Accounts](#).

LiveEngage CRM Customer Admin Panel

[← Back](#)

License Info

Customer Key	NAVO-00000000-SUGARCRM
CRM Type	SugarCRM
CRM Label	Edit SugarCRM
Subdomain	Edit sdbcbe9806.trial
OAuth Client ID	View
OAuth Client Secret	View
Created At	08/20/2018

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](#)

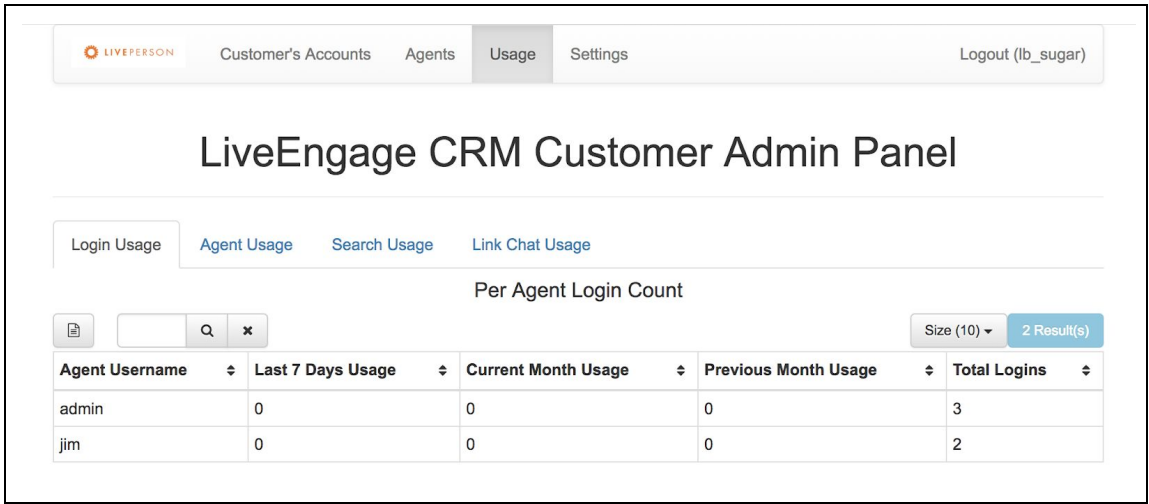
Username CRM

Usage

Link: Admin Panel → Usage



See the following usage statistics from the account:



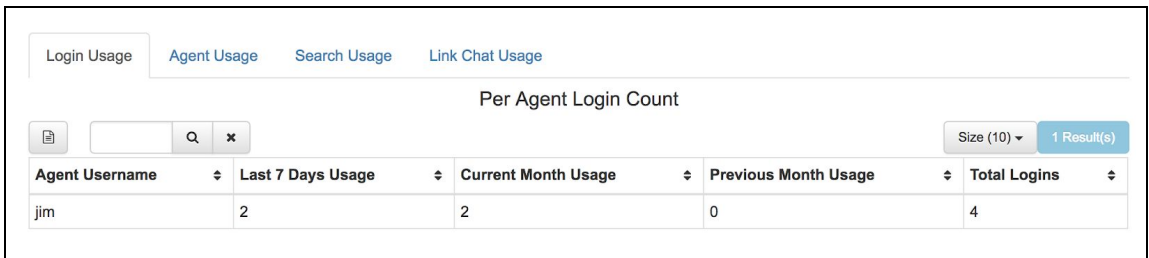
The screenshot shows the LiveEngage CRM Customer Admin Panel. The navigation bar includes 'LIVEPERSON', 'Customer's Accounts', 'Agents', 'Usage' (selected), and 'Settings'. A 'Logout (lb_sugar)' link is in the top right. The main heading is 'LiveEngage CRM Customer Admin Panel'. Below it are tabs for 'Login Usage', 'Agent Usage', 'Search Usage', and 'Link Chat Usage'. The current view is 'Per Agent Login Count'. There is a search bar and a 'Size (10)' dropdown. The table below shows usage statistics for two agents: 'admin' and 'jim'.

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 'Per Agent Login Count' view for a single agent, 'jim'. The table displays usage statistics for 'jim'.

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 report titled "Total Agent Logins". At the top, there are tabs for "Login Usage", "Agent Usage", "Search Usage", and "Link Chat Usage". Below the tabs, the report title "Total Agent Logins" is centered. On the right side, there is a "Size (10)" dropdown and a "1 Result(s)" button. The data is presented in a table with the following columns and values:

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 report titled "Search Count". At the top, there are tabs for "Login Usage", "Agent Usage", "Search Usage", and "Link Chat Usage". Below the tabs, the report title "Search Count" is centered. On the right side, there is a "Size (10)" dropdown and a "1 Result(s)" button. The data is presented in a table with the following columns and values:

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



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](#)

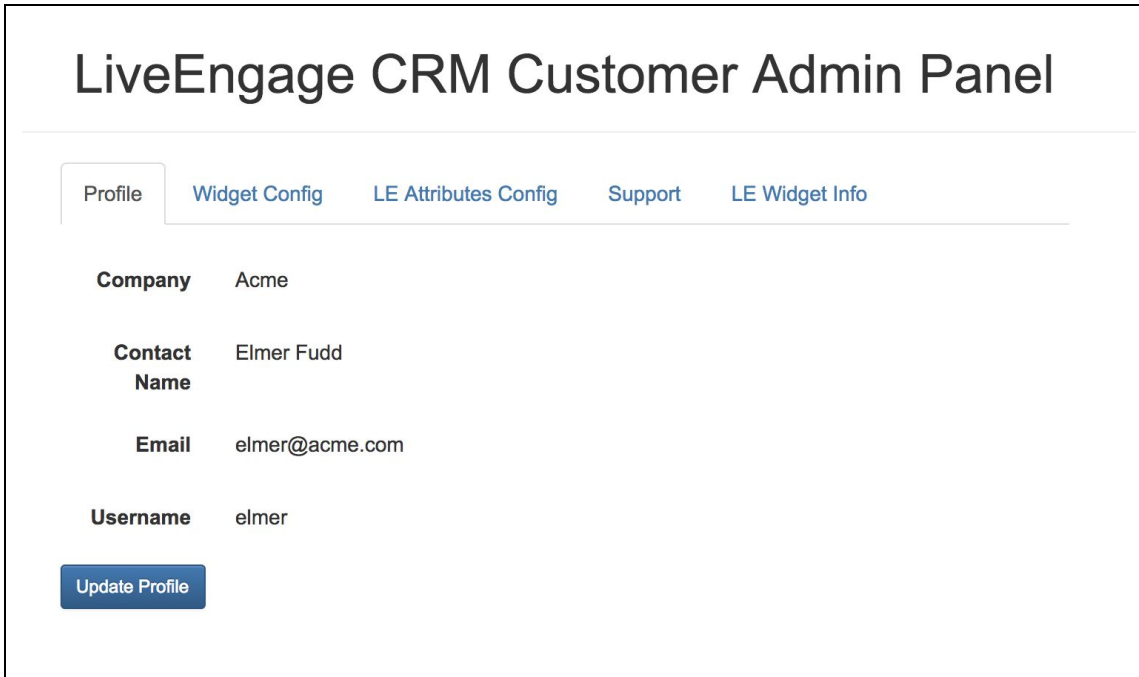
Profile

Link: Admin Panel → Settings → Profile



Here can verified your company profile information.

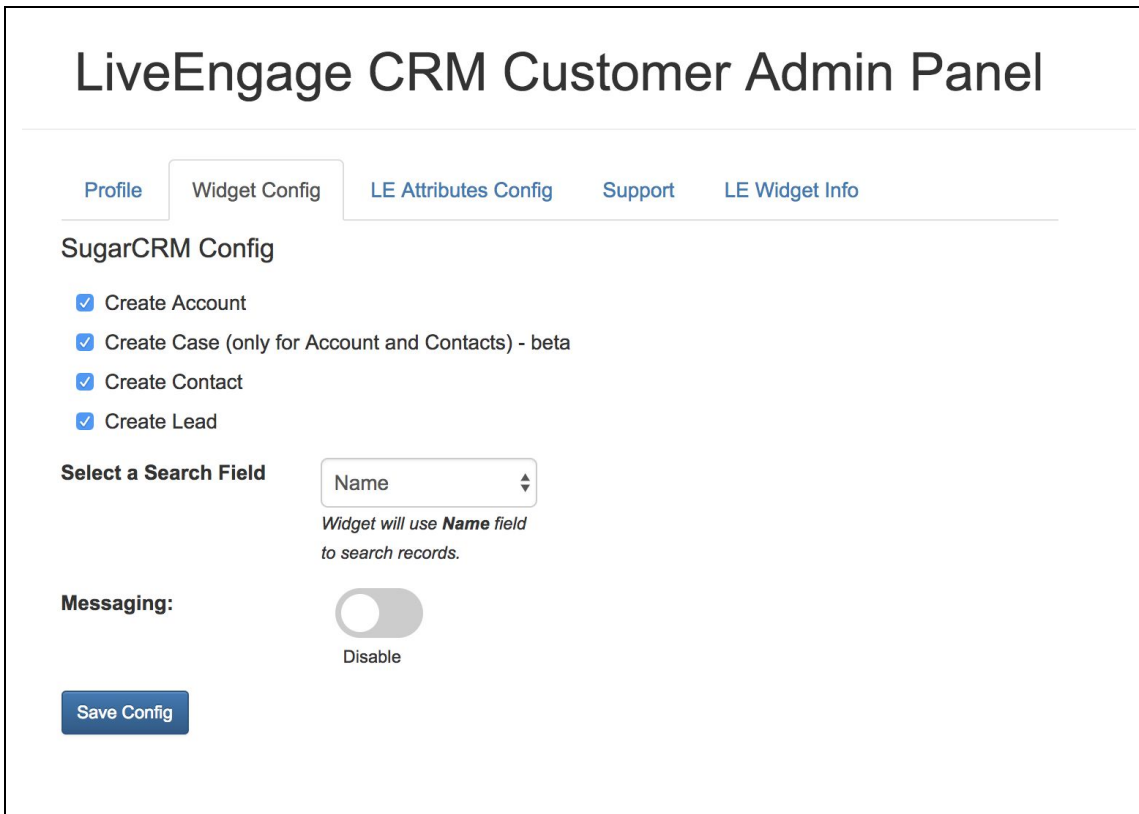
To update/change company profile information: Company Name, Contact Name, Email, Username, and Password.



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

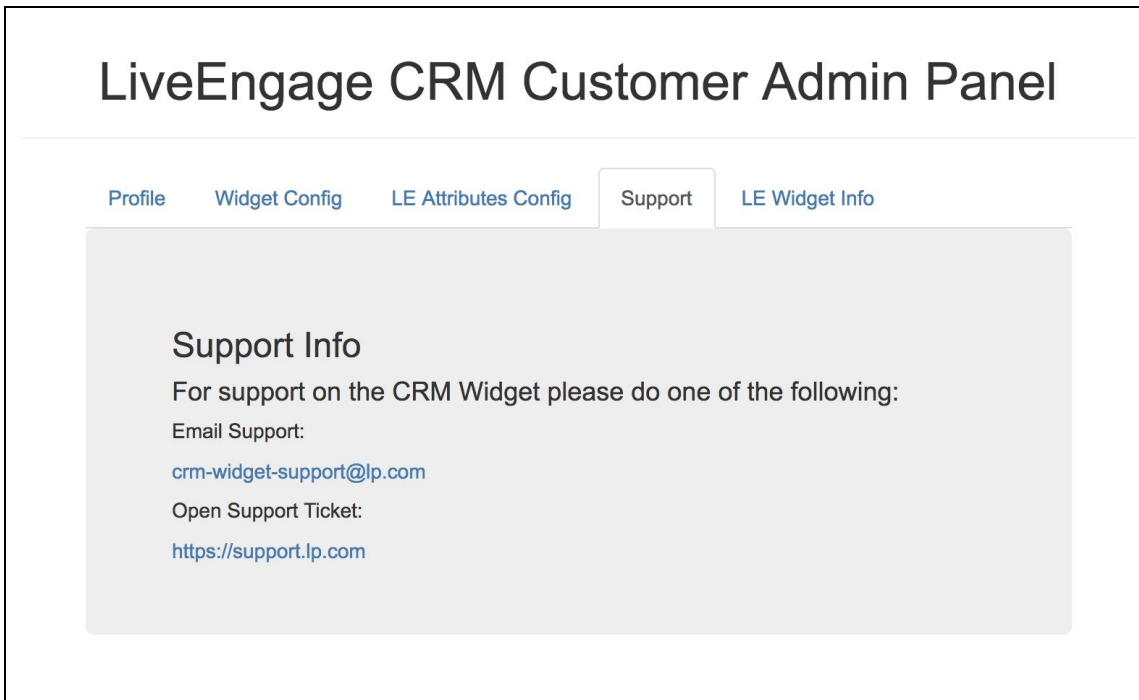
>

<

Support

Link: Admin Panel → Settings → Support

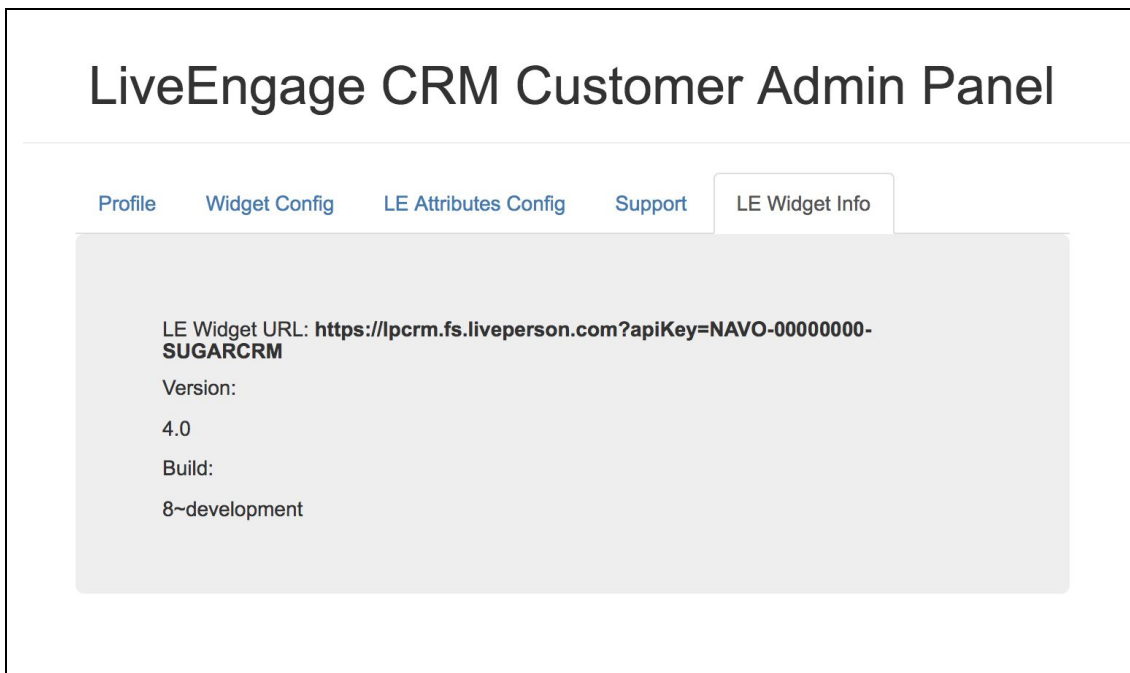
See support email and process to open a ticket for support.



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.



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.
- Subdomain: The main link part of CRM address. (<https://<subdomain>.sugarcrm.com>)
- OAuth Client ID: [Consumer Key value from SugarCRM](#)
- OAuth Client Secret: [Consumer Secret value from SugarCRM](#)

LiveEngage CRM Customer Admin Panel

[← Back](#)

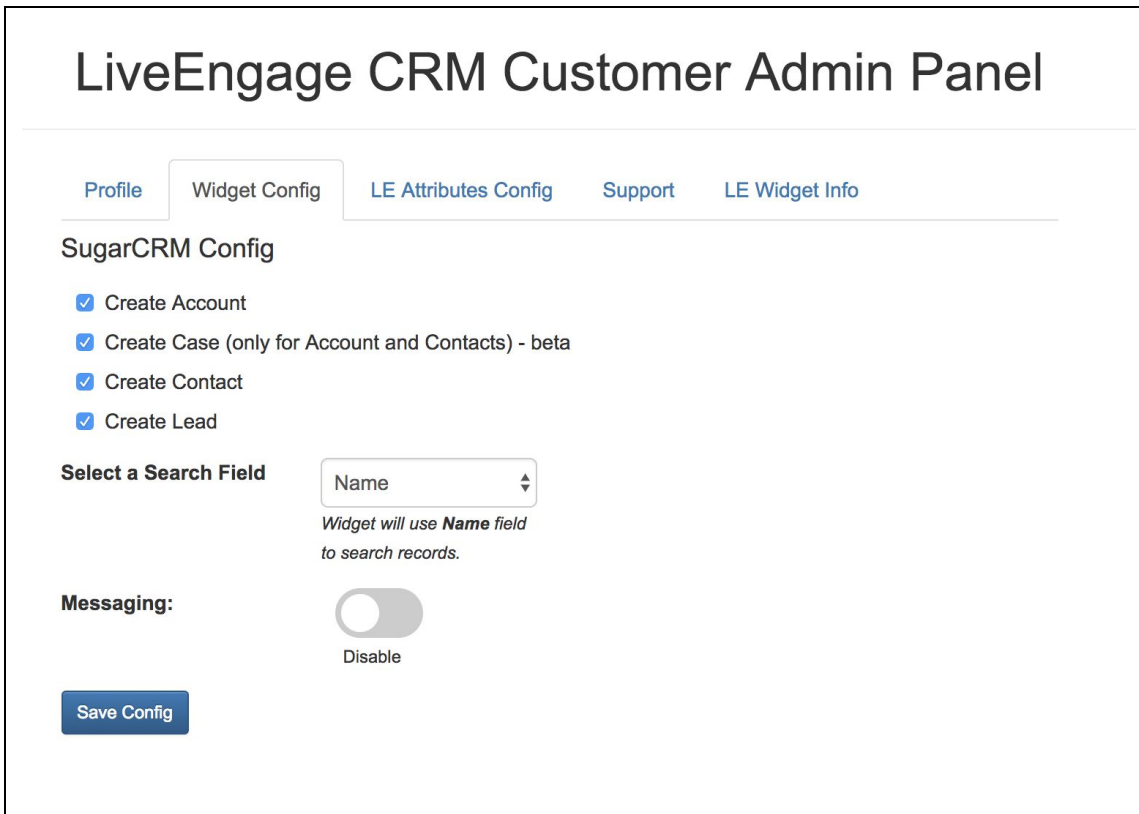
License Info

Customer Key	NAVO-00000000-SUGARCRM
CRM Type	SugarCRM
CRM Label	Edit SugarCRM
Subdomain	Edit sdbcbe9806.trial
OAuth Client ID	Hide Edit crmwidget_oauth2
OAuth Client Secret	View
Created At	08/20/2018

Widget Config

Link: Admin Panel → Settings → Widget Config

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

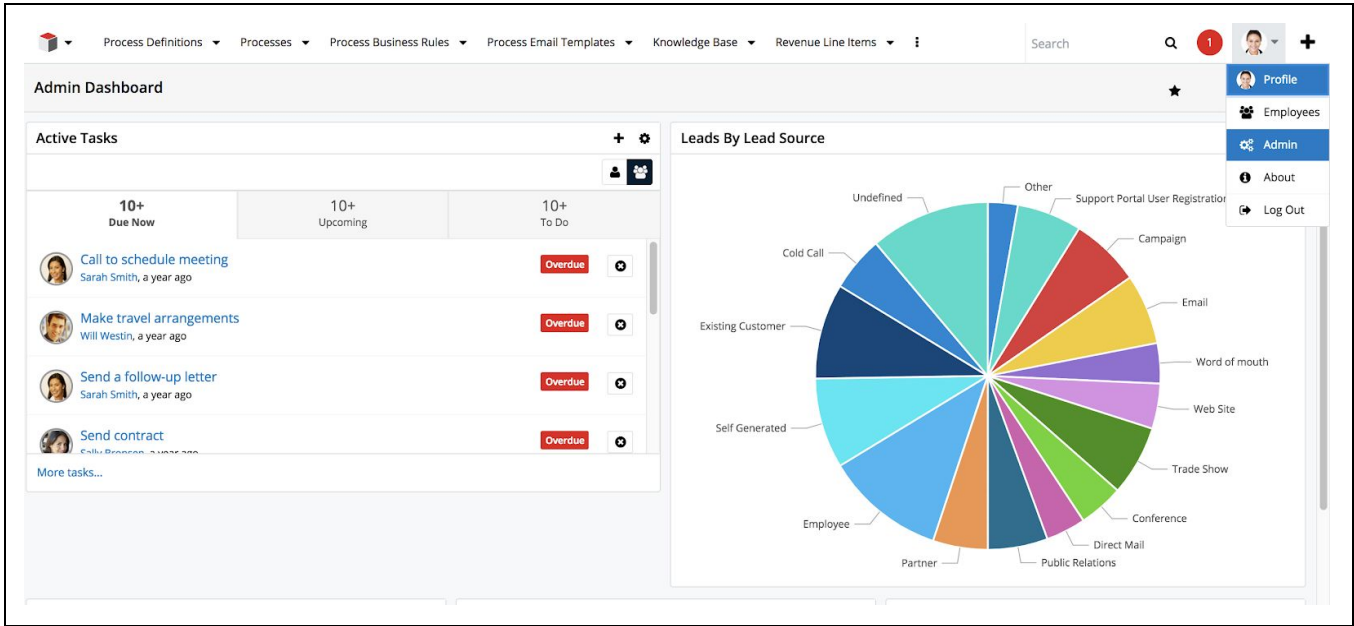


- Enabling/disabling entities that can be created within SugarCRM:
 - Create Account
 - Create Case
 - Create Contact
 - Create Lead
- Select a Search Field:
 - Name
 - Email
 - Phone
- Enabling/disabling Messaging

Configure CRM

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

1. Login into your SugarCRM in another browser tab.
2. Click on your profile icon on top right and click on "Administrator":

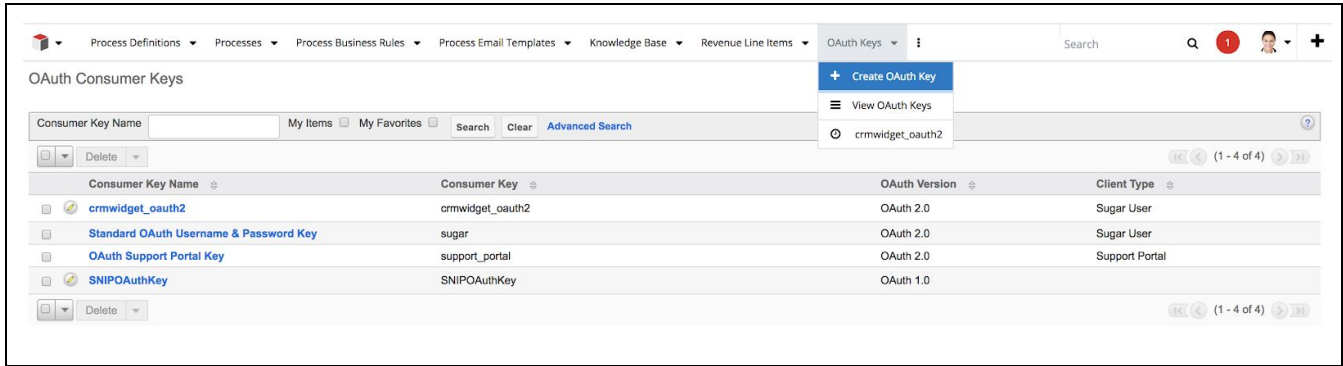


3. Click on "OAuth Keys" to setup a new oAuth.

The screenshot shows the SugarCRM Administration page. The 'Users' section includes links for 'User Management', 'Team Management', 'Password Management', 'Role Management', and 'Team-based Permissions'. The 'Sugar Connect' section includes 'Online Documentation' and 'Sugar Updates'. The 'System' section includes 'System Settings', 'Locale', 'Languages', 'Search', 'Connectors', 'Scheduler', 'Mobile', 'OAuth Keys', 'Import Wizard', 'Currencies', 'Repair', 'Diagnostic Tool', 'Tracker', 'PDF Manager', and 'Web Logic Hooks'. The 'Email' section is partially visible at the bottom.

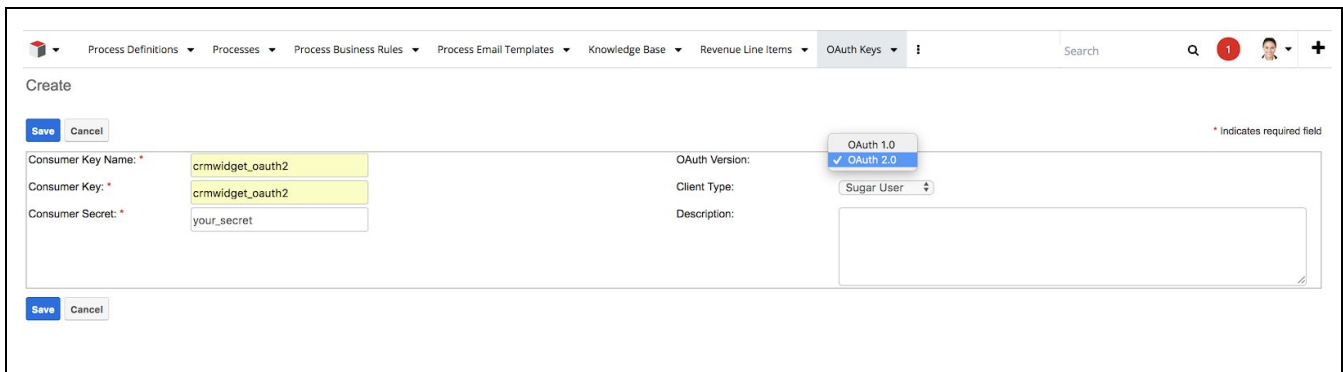
4. Then under "OAuth Keys" tab on the menu, click on "Create OAuth Key":





5. Complete the OAuth form and click "Save"
 - a. Consumer Key Name = <crmwidget>
 - b. Consumer Key = crmwidget
 - c. Consumer Secret = [your-hash-code-secret-code]
 - d. OAuth Version: OAuth 2.0

You will use above information in Admin Panel.



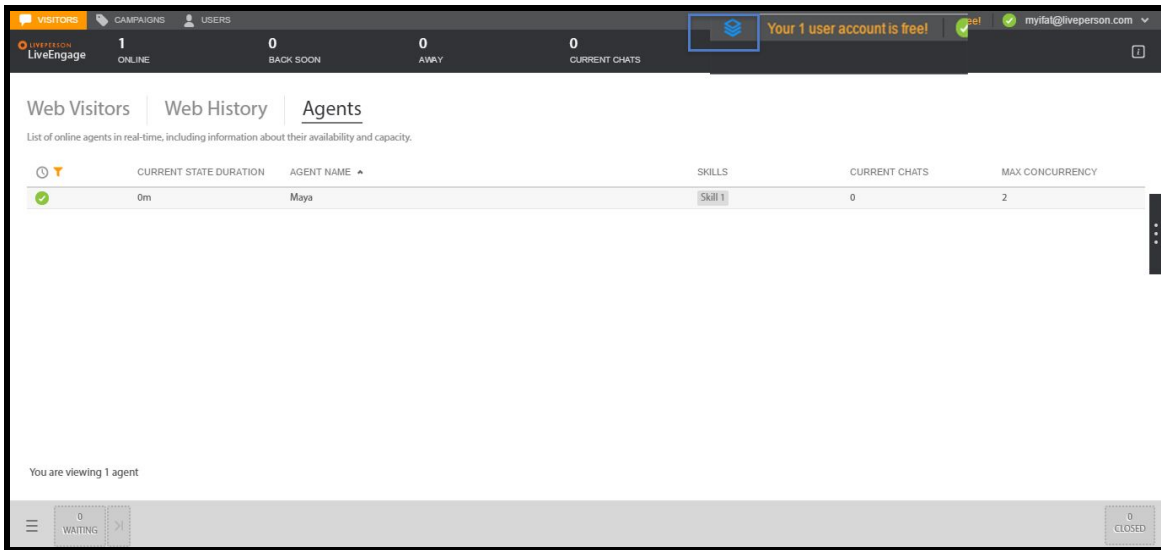
Adding Widget in LiveEngage Console

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

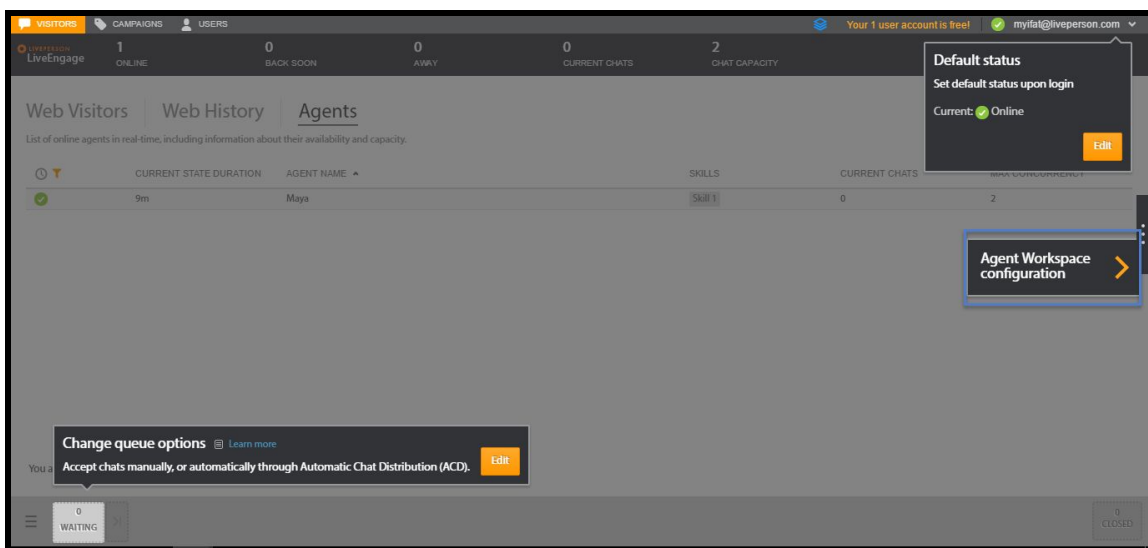
Note! Your LiveEngage user must be defined as an Administrator to configure the widget.



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

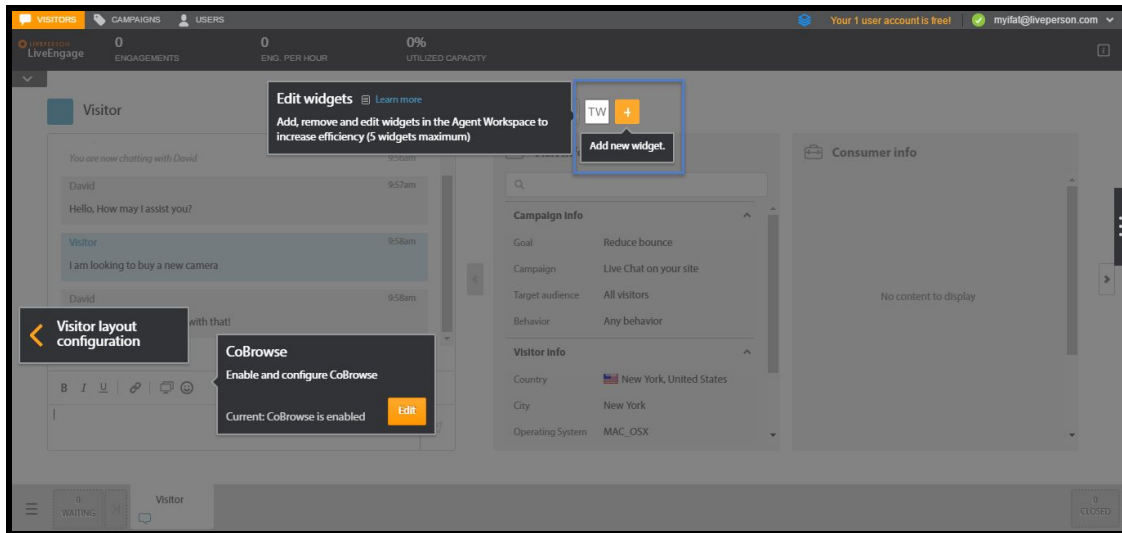


2. Once in Night Vision, click on “Agent Workspace Configuration”



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

LE - SUGARCRM Integration Guide



4. Choose the name for the Widget (you can use "SugarCRM" to have "SU" 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, 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 SUGARCRM.

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

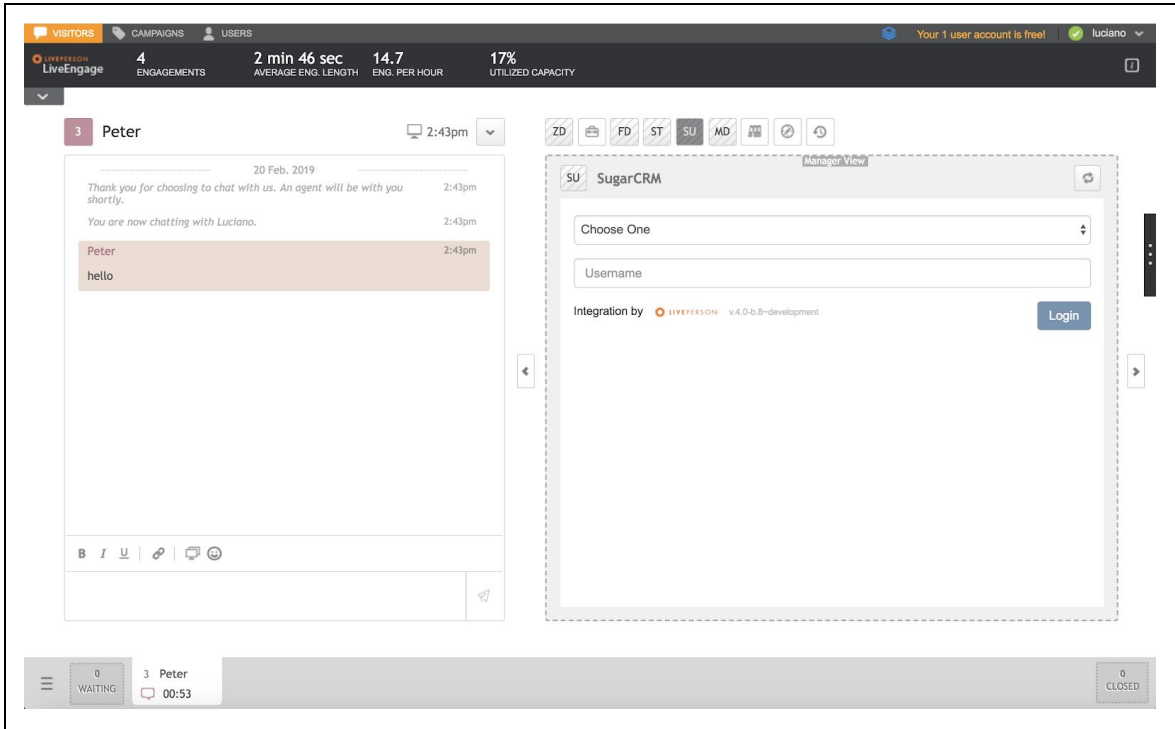
Overview

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

- Starting SugarCRM 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 SugarCRM Widget

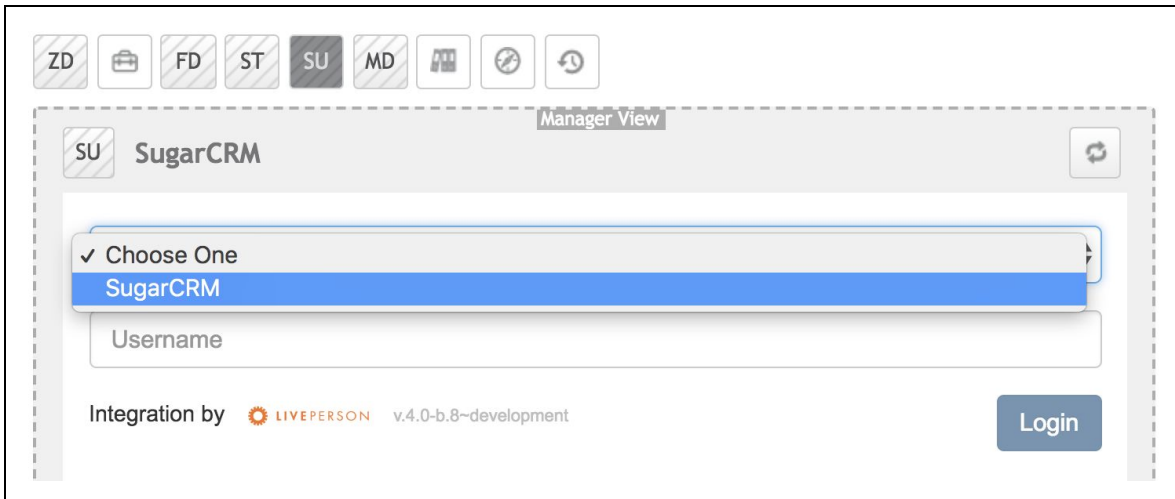
To start working on the new widget, accept a chat, click on "SugarCRM" widget, login and you can view Contacts and Leads and create Accounts, Leads, Contacts and Cases directly in LiveEngage.



Login Widget

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

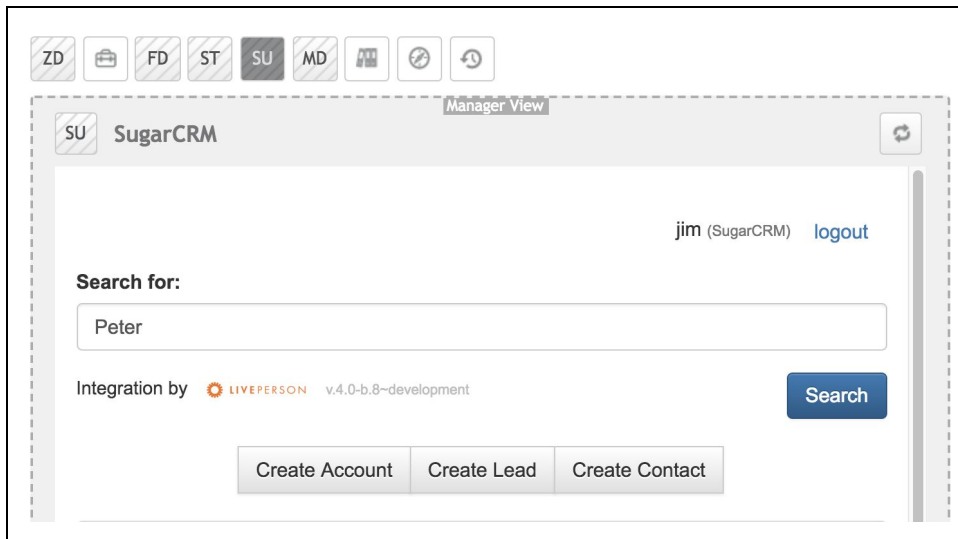
Select registered CRM:



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 Sugar CRM 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 SugarCRM 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

Profile

Widget Config

LE Attributes Config

Support

LE Widget Info

SugarCRM Config

- Create Account
- Create Case (only for Account and Contacts) - beta
- Create Contact
- Create Lead

Select a Search Field

- Name
- Email
- Phone

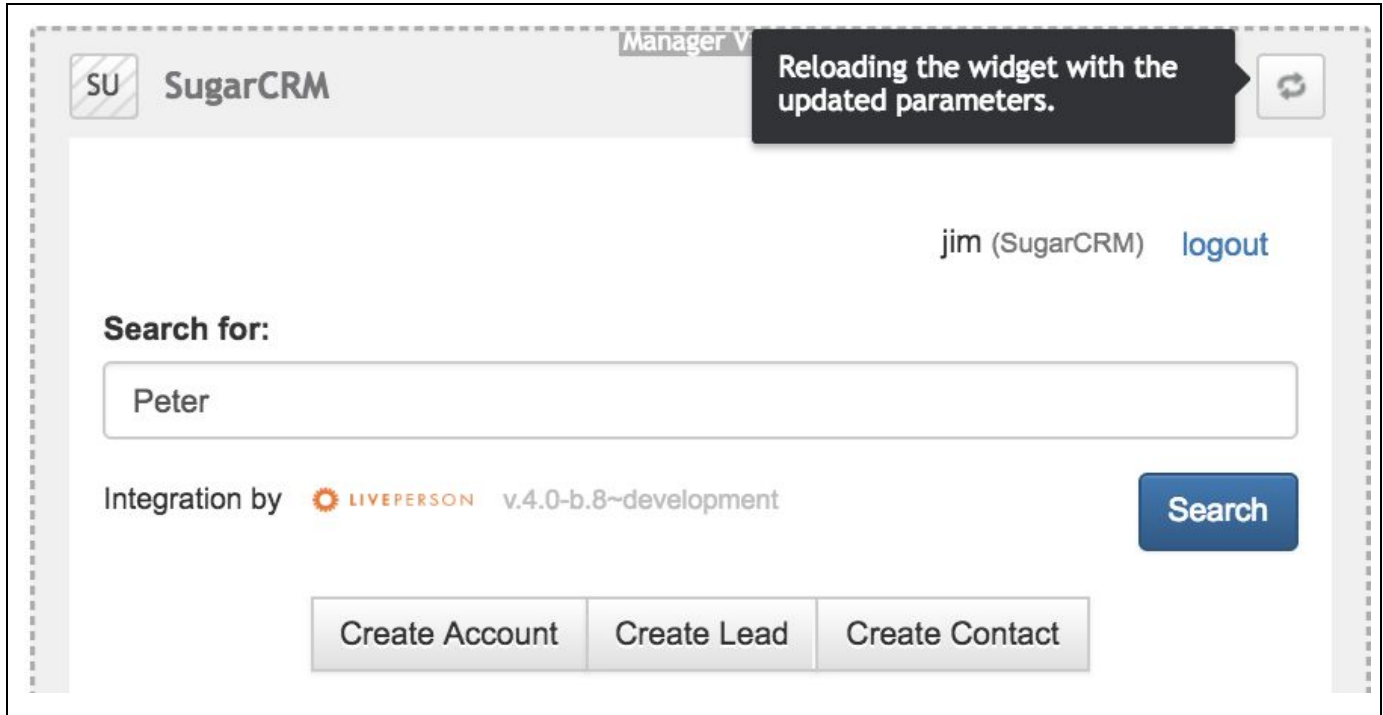
Messaging:



Disable

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:



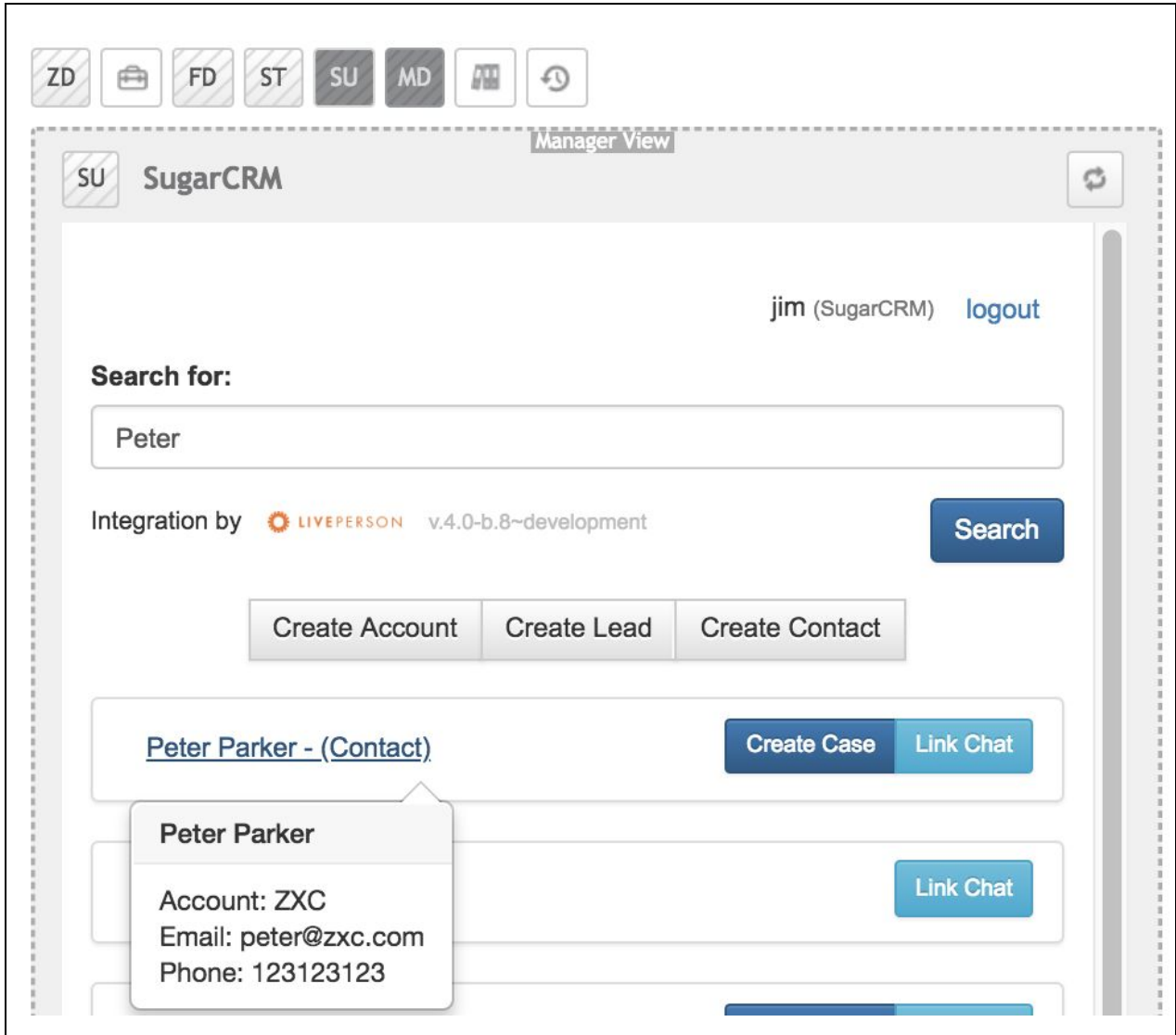
View Records

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 (LEAD and CONTACT in this case).

The screenshot displays the SugarCRM Manager View interface. At the top left, there is a user profile for 'SU SugarCRM' and a 'Manager View' tab. On the top right, the user 'jim (SugarCRM)' is logged in with a 'logout' link. A search bar contains the text 'Peter'. Below the search bar, it indicates 'Integration by LIVEPERSON v.4.0-b.8~development' and a 'Search' button. Three buttons are visible: 'Create Account', 'Create Lead', and 'Create Contact'. The search results are listed in a table-like format:

Name	Type	Actions
Peter Parker	(Contact)	Create Case, Link Chat
Peter Parker	(Lead)	Link Chat
Laura Peters	(Contact)	Create Case, Link Chat
Mary Peters	(Contact)	Create Case, Link Chat
Laura Peters	(Lead)	Link Chat

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:

[← Back](#)

Contact Details

Name	Peter Parker
Title	
Email	peter@zxc.com
Phone	123123123
Lead Source	
Record Owner	
Link	Open Contact in SugarCRM

And here is an example of LEAD:

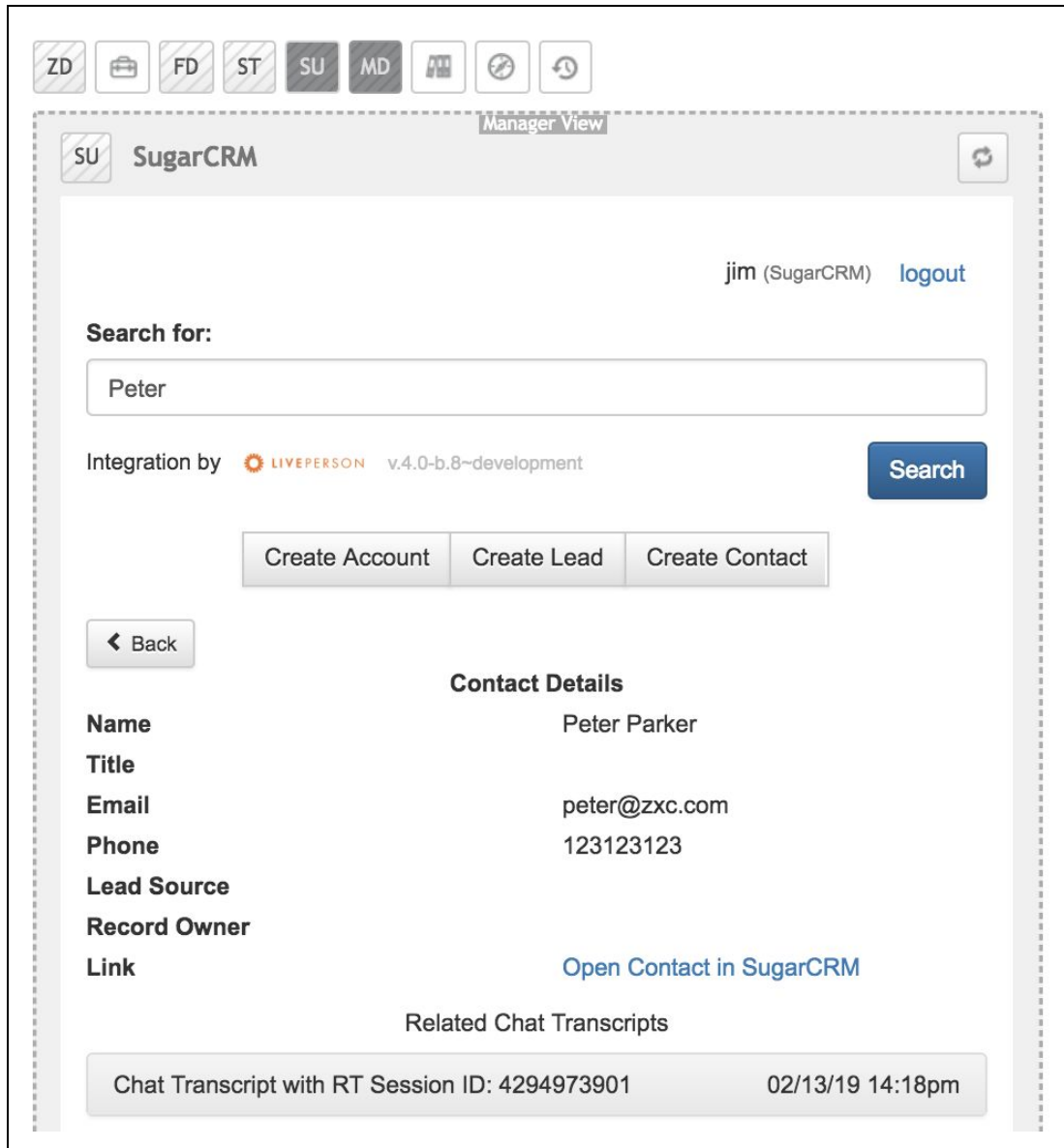
[← Back](#)

Lead Details

Name	Peter Parker
Company	
Title	
Email	peter@zxc.com
Phone	123123123
Lead Source	
Lead Status	
Record Owner	
Link	Open Lead in SugarCRM

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](#)

Contact Details

Name Peter Parker
Title
Email peter@zxc.com
Phone 123123123
Lead Source
Record Owner
Link [Open Contact in SugarCRM](#)

Related Chat Transcripts

[Chat Transcript with RT Session ID: 4294973901](#) 02/13/19 14:18pm

RT Session ID: 4294973901

Visitor Name: Peter

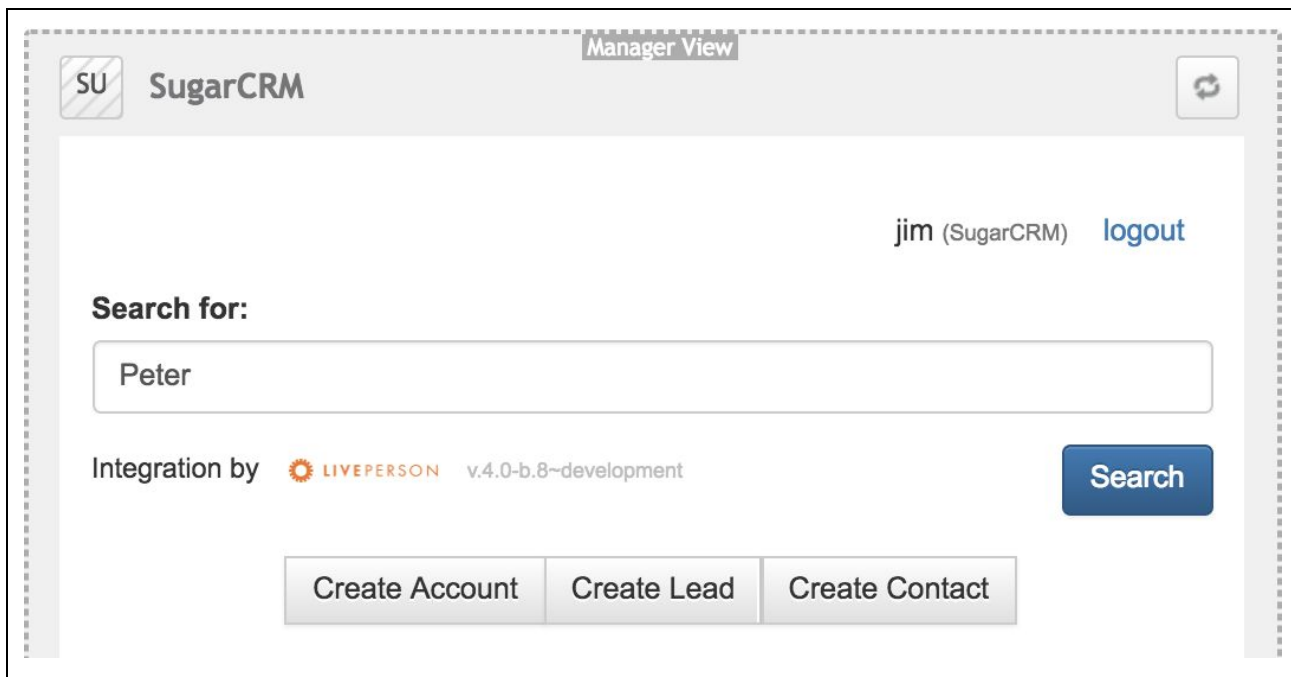
Transcript:
info: Thank you for choosing to chat with us. An agent will be with you shortly.
info: You are now chatting with Luciano.
Peter: hello
Luciano: I'm sorry for the delay. I'll be right with you.
Luciano: I'll be right with you.
Luciano: Thank you for waiting. I'll be with you in just a moment.
Luciano: I'm sorry for the delay. I'll be right with you.
Peter: well
Luciano: I'll be right with you.
info: Thank you for chatting with us.

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

Create New Records

The SugarCRM 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 "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 *

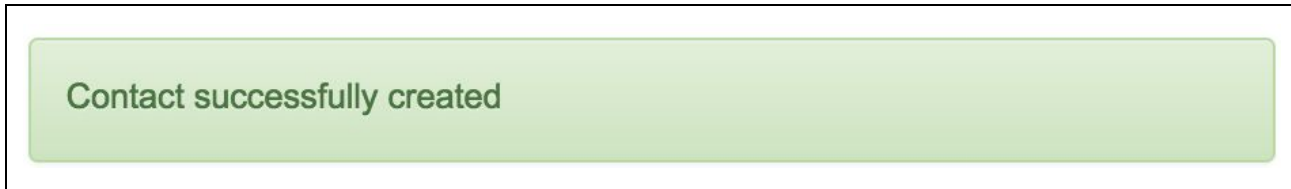
Last Name *

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:

Process Definitions Processes Process Business Rules Process Email Templates Knowledge Base Revenue Line Items Customer Journeys **Contacts**

Contacts (20 of 21+) [Create](#) > **Contacts Intelligence**

Filter [Create](#) Search by first name, last name...

	Name	Title	Account Name	Email Address	Office Phone	Mobile	User	Date Modified	
<input type="checkbox"/>	<input type="checkbox"/> ☆ Peter Parker		ZXC	peter@zxc.com		123123123		02/13/2019 14:...	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/> ☆ Xen Xol			xen@zxc.com		458458458		02/08/2019 14:...	<input type="checkbox"/>

Call Volume by Week
Total is 4

And when you click on a Contact, the window with the detailed data of this record opens:

The screenshot displays a contact record for Peter Parker in a web interface. At the top, there is a header bar with a green circular icon containing 'Co', a star icon, a 'Follow' button, the name 'Peter Parker', and an 'Edit' button with a dropdown arrow. Below the header, the 'Business Card' tab is active. The data is presented in a two-column layout:

Title	Mobile
	123123123
Department	Do Not Call
	<input type="checkbox"/>
Account Name	Email Address
	peter@zxc.com
Tags	

Below the business card information, there is a 'Show More' button with a downward arrow and a 'Hint' button with an upward arrow. Under the 'Hint' section, a list of additional fields is shown in two columns:

Company Website	Education
Education Additional	Previous Jobs
Company Size	Industry
Company Location	Company Description
Year Founded	Industry Tags
NAICS Code	SIC Code
FY End	Annual Rev

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.

Quick Create Lead

First Name *	<input type="text" value="Peter"/>
Last Name *	<input type="text" value="Parker"/>
Email *	<input type="text" value="peter@zxc.com"/>
Phone *	<input type="text" value="123123123"/>

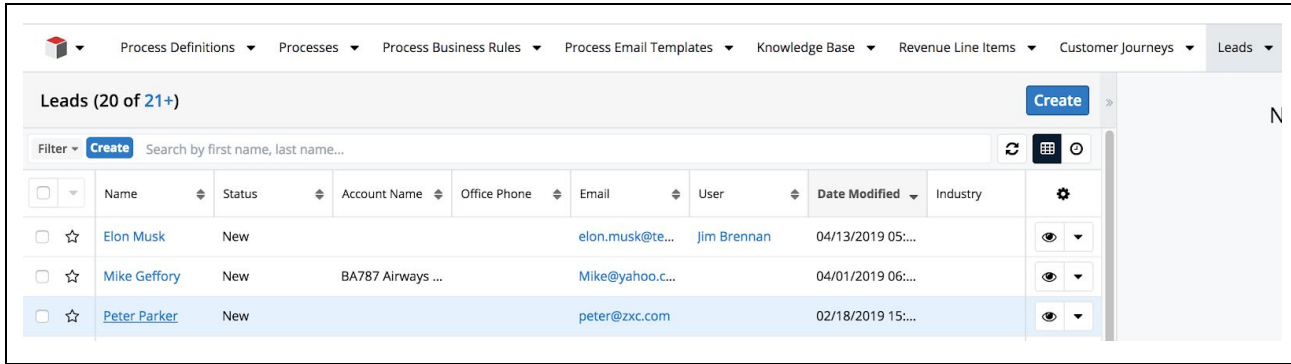
Cancel Create

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

Lead successfully created

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

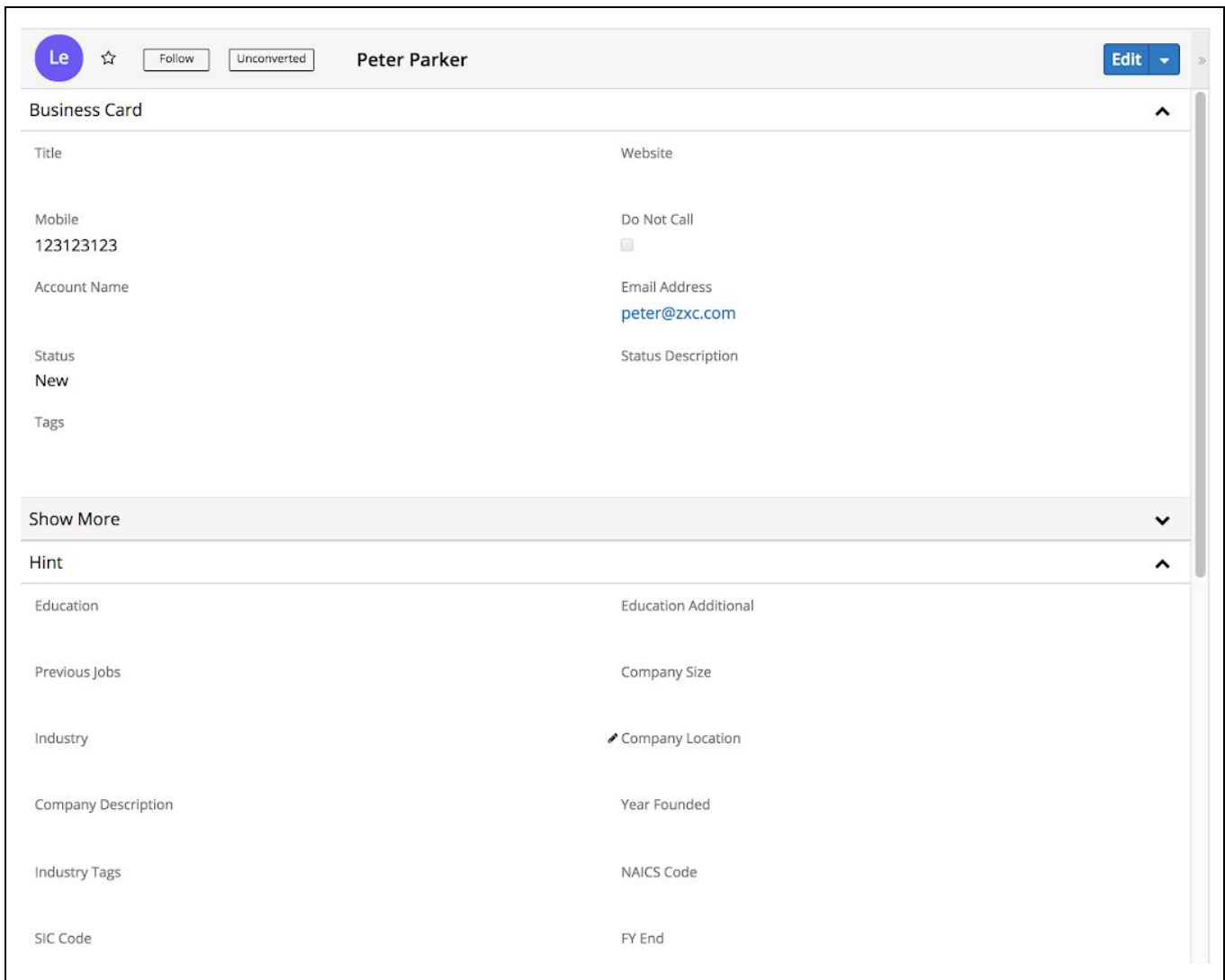
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The screenshot shows the SugarCRM interface for managing leads. At the top, there is a navigation bar with various menu items: Process Definitions, Processes, Process Business Rules, Process Email Templates, Knowledge Base, Revenue Line Items, Customer Journeys, and Leads. Below this, the page title is "Leads (20 of 21+)" with a "Create" button. A search bar is present with the text "Filter Create Search by first name, last name...". Below the search bar is a table with columns: Name, Status, Account Name, Office Phone, Email, User, Date Modified, and Industry. Three leads are listed: Elon Musk (New, elon.musk@te..., Jim Brennan, 04/13/2019 05:...), Mike Geffory (New, BA787 Airways ..., Mike@yahoo.c..., 04/01/2019 06:...), and Peter Parker (New, peter@zxc.com, 02/18/2019 15:...).

	Name	Status	Account Name	Office Phone	Email	User	Date Modified	Industry
<input type="checkbox"/>	Elon Musk	New			elon.musk@te...	Jim Brennan	04/13/2019 05:...	
<input type="checkbox"/>	Mike Geffory	New	BA787 Airways ...		Mike@yahoo.c...		04/01/2019 06:...	
<input type="checkbox"/>	Peter Parker	New			peter@zxc.com		02/18/2019 15:...	

And when you click on a Lead, the window with the detailed data of this record opens:



The screenshot shows the detailed view of a lead record for "Peter Parker". The record is marked as "Unconverted" and has an "Edit" button. The "Business Card" section contains the following information:

Title	Website
Mobile 123123123	Do Not Call <input type="checkbox"/>
Account Name	Email Address peter@zxc.com
Status New	Status Description
Tags	

Below the Business Card section is a "Show More" button. The "Hint" section contains the following information:

Education	Education Additional
Previous Jobs	Company Size
Industry	Company Location
Company Description	Year Founded
Industry Tags	NAICS Code
SIC Code	FY End



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 *

Website

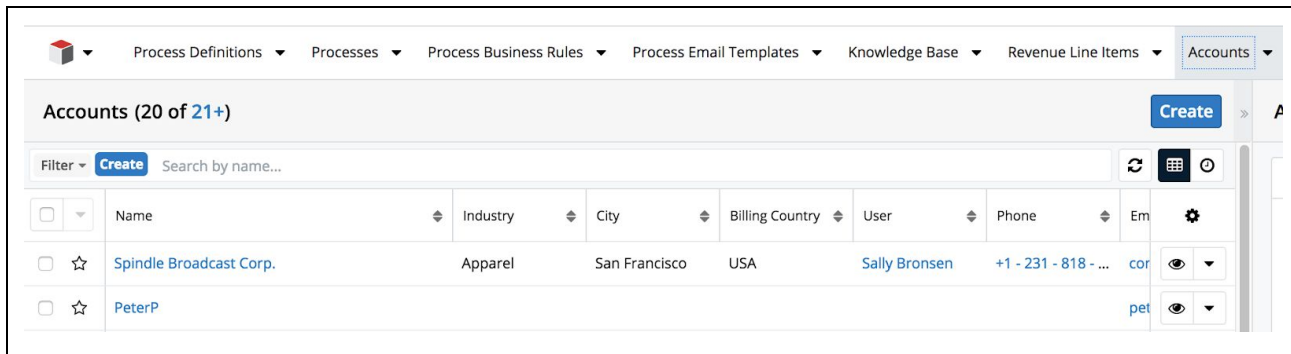
Cancel Create

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:

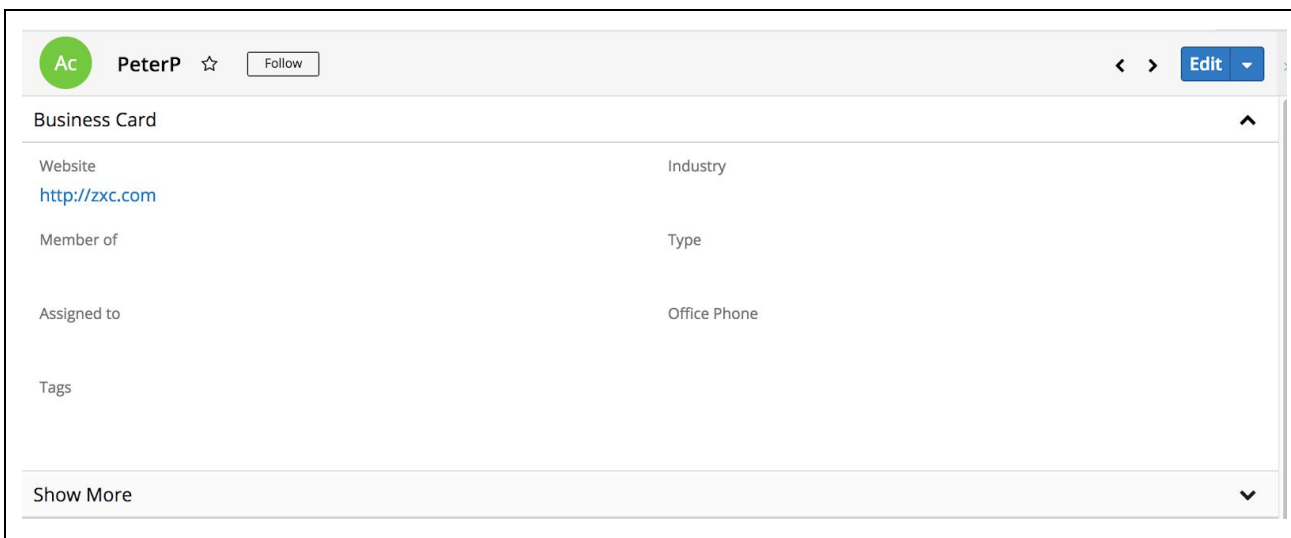
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The screenshot shows the 'Accounts' section of a CRM interface. At the top, there is a navigation bar with various menu items: Process Definitions, Processes, Process Business Rules, Process Email Templates, Knowledge Base, Revenue Line Items, and Accounts. Below the navigation bar, the title 'Accounts (20 of 21+)' is displayed, along with a 'Create' button. A search bar with the placeholder 'Search by name...' and a 'Filter' dropdown is present. Below the search bar is a table with columns: Name, Industry, City, Billing Country, User, Phone, and Email. Two accounts are visible: 'Spindle Broadcast Corp.' and 'PeterP'. The 'Spindle Broadcast Corp.' row shows 'Apparel' as the industry, 'San Francisco' as the city, 'USA' as the billing country, 'Sally Bronsen' as the user, and '+1 - 231 - 818 - ...' as the phone number. The 'PeterP' row shows 'pet' as the email address. Each row has a checkbox, a star icon, and a gear icon for settings.

<input type="checkbox"/>	Name	Industry	City	Billing Country	User	Phone	Em	
<input type="checkbox"/>	Spindle Broadcast Corp.	Apparel	San Francisco	USA	Sally Bronsen	+1 - 231 - 818 - ...	cor	
<input type="checkbox"/>	PeterP						pet	

And when you click on an Account, the window with the detailed data of this record opens:



The screenshot shows the detailed view of the 'PeterP' account. At the top, there is a header with a green circle containing 'Ac', the name 'PeterP', a star icon, and a 'Follow' button. To the right of the header are navigation arrows and an 'Edit' button. Below the header is a section titled 'Business Card' with an upward arrow. The 'Business Card' section contains several fields: 'Website' with the value 'http://zxc.com', 'Industry', 'Member of', 'Type', 'Assigned to', and 'Office Phone'. There is also a 'Tags' section. At the bottom of the 'Business Card' section is a 'Show More' button with a downward arrow.

Create Case

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

Additional Info: Peter Parker

Subject*

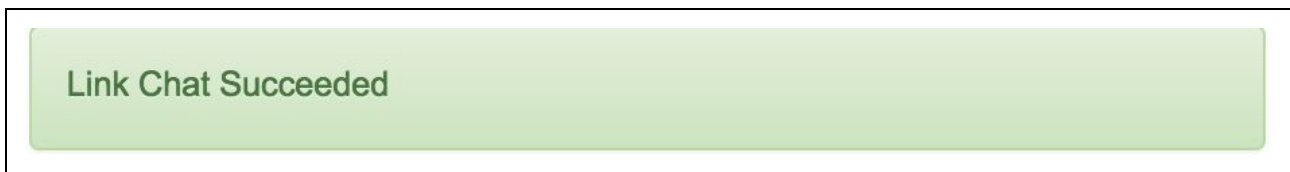
Status*

Priority*

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:

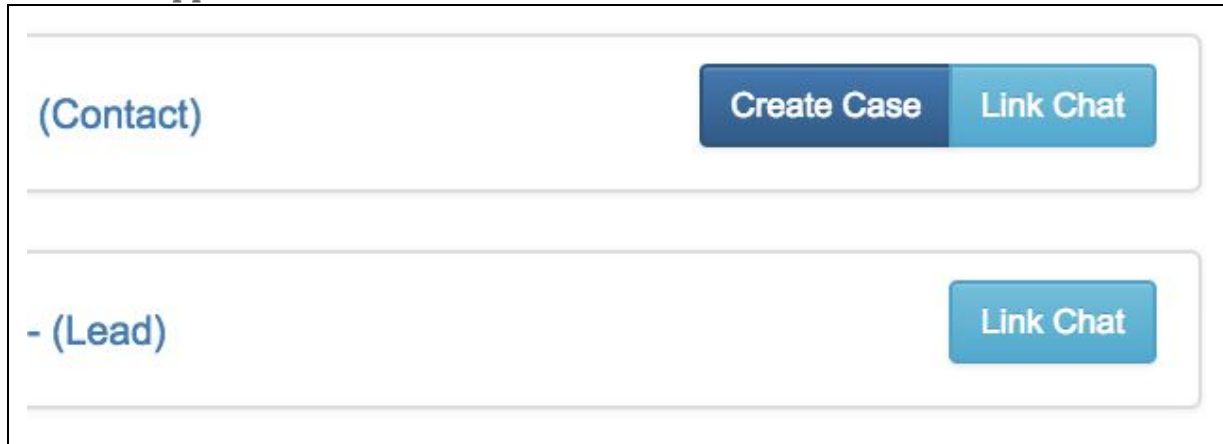


Note! *“Create Case” can only be done when the chat session has ended. The “Create Case” button is disabled throughout an active engagement.*

Disabled buttons appearance:

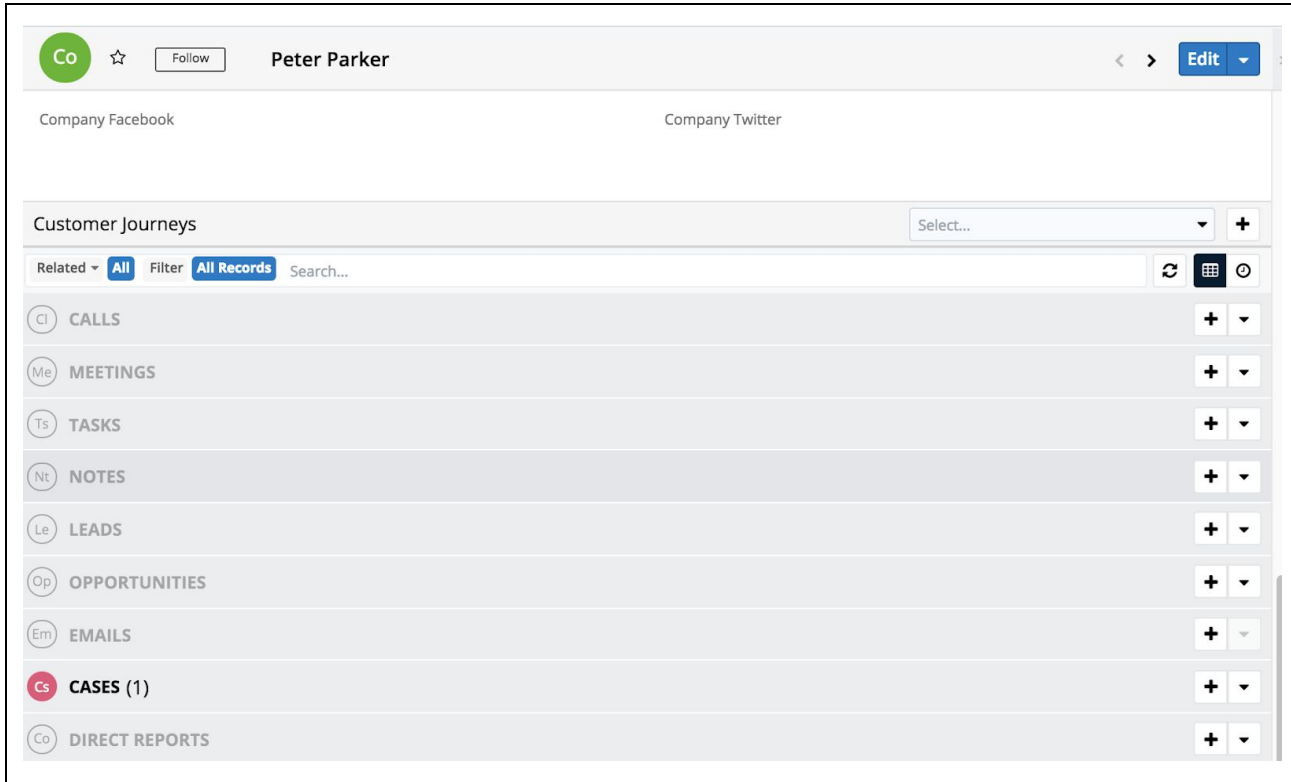


Enabled buttons appearance:

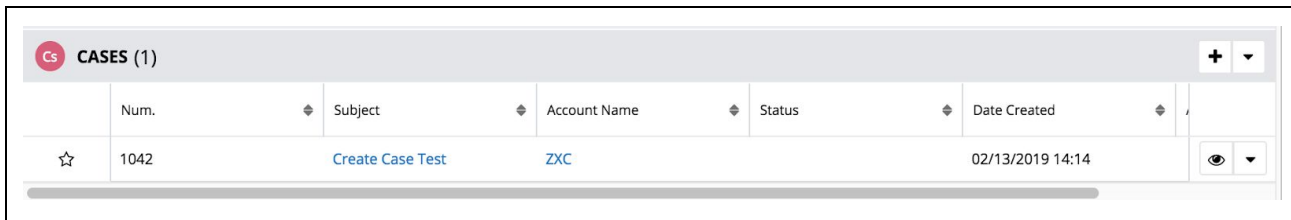


Note where this record will be stored in CRM system itself. You can access in Top Menu "Cases" or open the Contact / Lead and going to Customer Journeys session:

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Click on "Cases" and all records for the user will be shown:



And when you click on a Case, the window with the detailed data of this record opens:

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The screenshot displays a CRM record for 'Create Case Test'. The record details are as follows:

Number	1042	Priority	Low
Account Name	ZXC	Show in Portal	<input type="checkbox"/>
Type	User	Source	
Status		Assigned to	
Description	Description Test		
Comment Log			
Tags			

Below the record details is a 'Customer Journeys' section with a 'Select...' dropdown and a '+' icon. It includes a filter for 'All Records' and a search bar. The list of related items is:

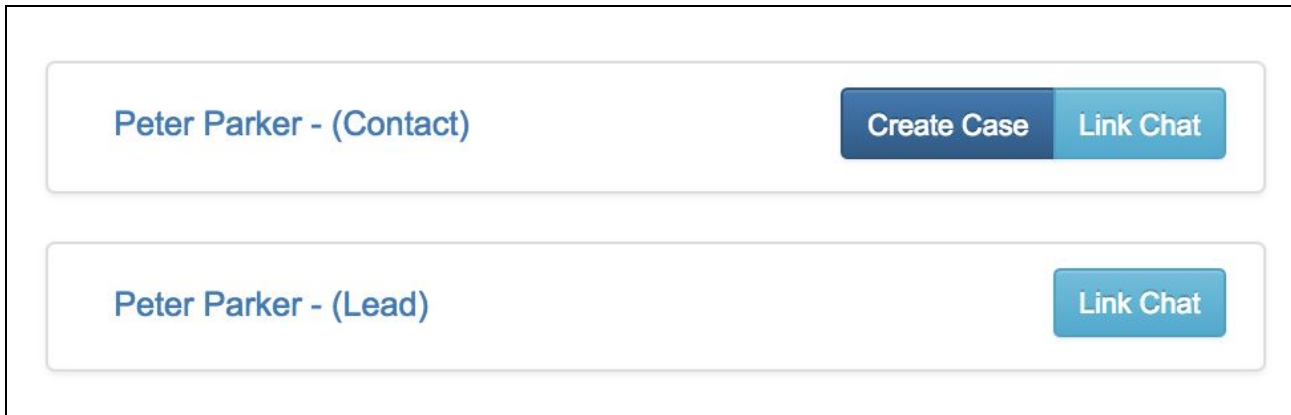
- Cl CALLS
- Me MEETINGS
- Ts TASKS
- Nt NOTES (1)



Link Chat Transcripts to Entity

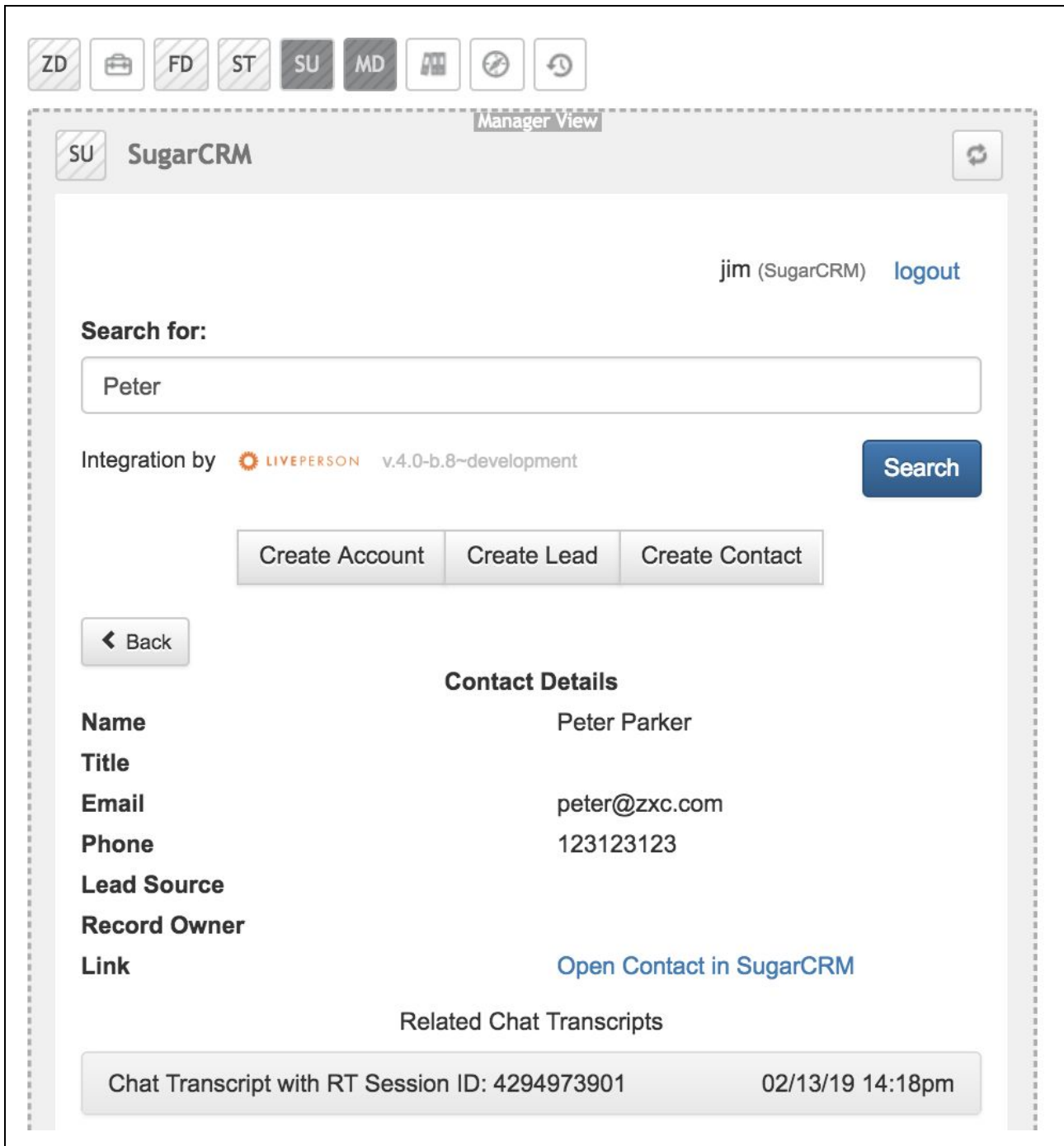
In case the chat is related to an existing Contact or Lead, you can link the chat to that relevant record in Sugar CRM

- You can attach a current chat transcript to a User or Case 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 show in the screen below:

[← Back](#)

Contact Details

Name Peter Parker
Title
Email peter@zxc.com
Phone 123123123
Lead Source
Record Owner
Link [Open Contact in SugarCRM](#)

Related Chat Transcripts

[Chat Transcript with RT Session ID: 4294973901](#)

02/13/19 14:18pm

RT Session ID: 4294973901

Visitor Name: Peter

Transcript:

info: Thank you for choosing to chat with us. An agent will be with you shortly.

info: You are now chatting with Luciano.

Peter: hello

Luciano: I'm sorry for the delay. I'll be right with you.

Luciano: I'll be right with you.

Luciano: Thank you for waiting. I'll be with you in just a moment.

Luciano: I'm sorry for the delay. I'll be right with you.

Peter: well

Luciano: I'll be right with you.

info: Thank you for chatting with us.

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

To see all Notes (linked chats), click on "Notes" in top menu:

	Subject	Contact	Related To	Attachment	Created By	Date Modified	Date Created	
<input type="checkbox"/>	Chat Transcript wi...		Peter Parker		Jim Brennan	02/13/2019 14:18	02/13/2019 14:18	<input type="checkbox"/> <input type="star"/>
<input type="checkbox"/>	Chat Transcript wi...		Create Case Test		Jim Brennan	02/13/2019 14:14	02/13/2019 14:14	<input type="checkbox"/> <input type="star"/>

To list just Lead / Case Notes (linked chat), select a specific Record, go to 'Customer Journeys' and click on "Notes":

	Subject	Last Modified	Date Created	Assigned User	
<input type="checkbox"/>	Chat Transcript with RT Session ID: 429...	02/13/2019 14:21	02/13/2019 14:21		<input type="checkbox"/> <input type="star"/>

And when you click on a specific Note, the window with the detailed data of this record opens:

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Process Definitions Processes Process Business Rules Process Email Templates Knowledge Base Revenue Line Items Customer Journeys Notes

Nt Chat Transcript with RT Session ID: 4294973901 Follow Edit

Contact Create Case Test

Description Teams
RT Session ID: 4294973901 Global (Primary)

Visitor Name: Peter

Transcript:
info: Thank you for choosing to chat with us. An agent will be with you shortly.
info: You are now chatting with Luciano.
Peter: hello
Luciano: I'm sorry for the delay. I'll be right with you.
Luciano: I'll be right with you.
Luciano: Thank you for waiting. I'll be with you in just a mo...
[more](#)

Attachment Assigned to

Tags

Show more...

Module **Notes** Filter **All Activity Stream** Refresh Grid Close

Type a note or drag and drop an attachment. Type @ to mention a user. Type # to reference a record. Submit

Nt Created Chat Transcript with RT Session ID: 4294973901 Note. Comment View
Jim Brennan 4 minutes ago

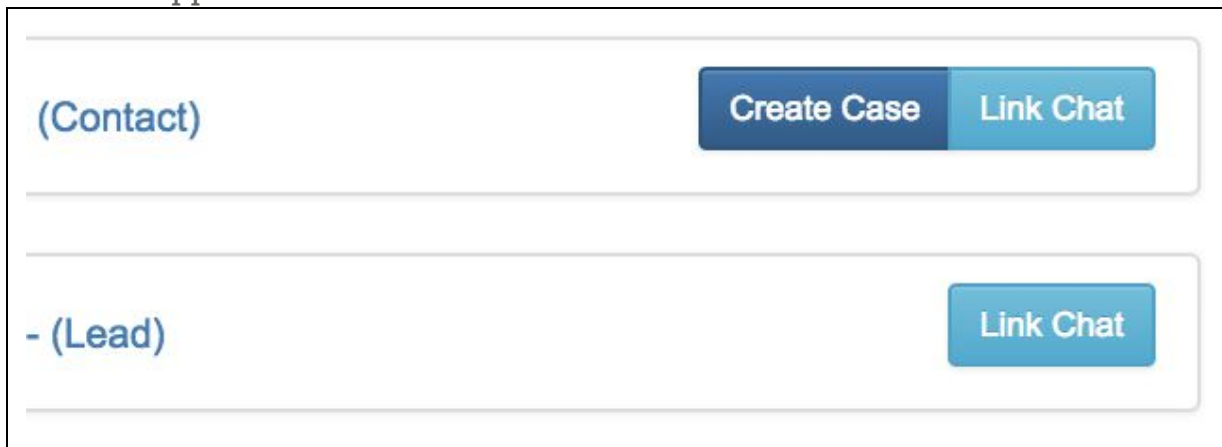
Cs Linked Chat Transcript with RT Session ID: 4294973901 to Create Case Test. Comment View
Jim Brennan 4 minutes ago

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:



Open in Sugar Link

In Contact and Lead details, is provided a link to open the current record directly in SugarCRM:



Updating Records

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

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