SUGARCRM 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
	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

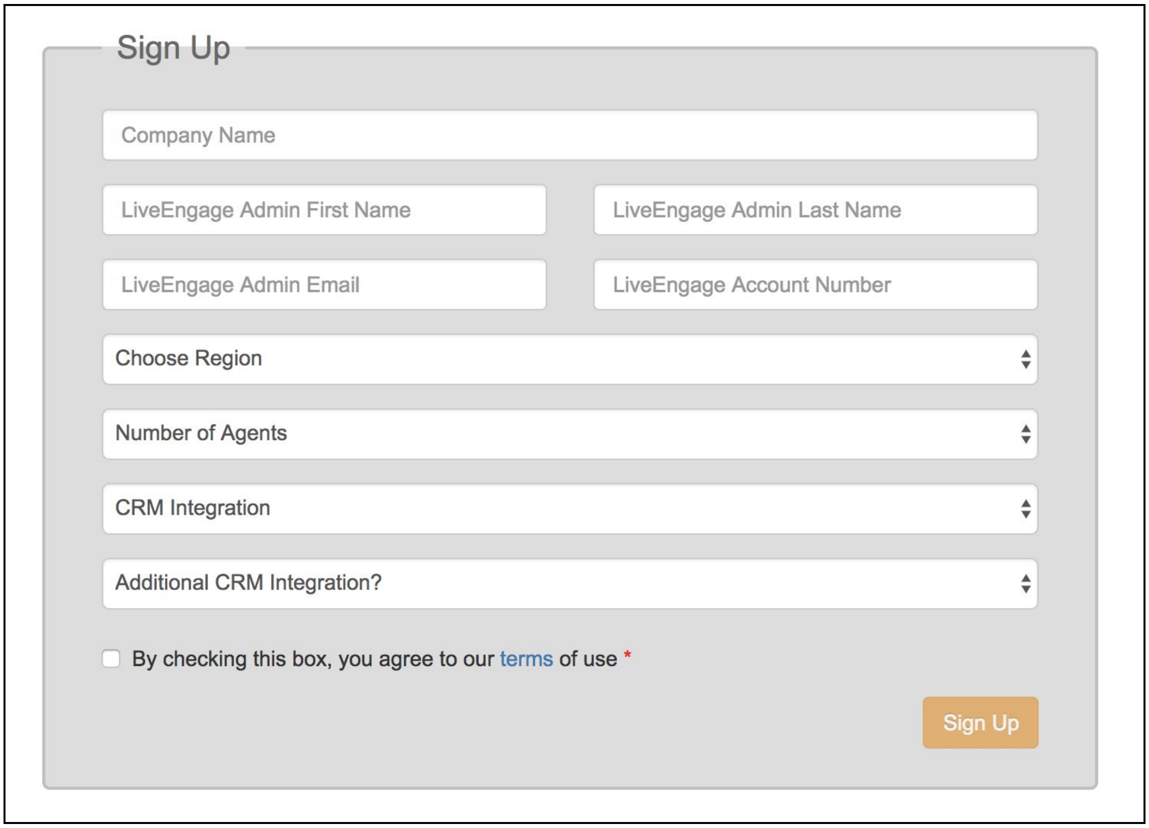
Below is an overview of the required widget settings:

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

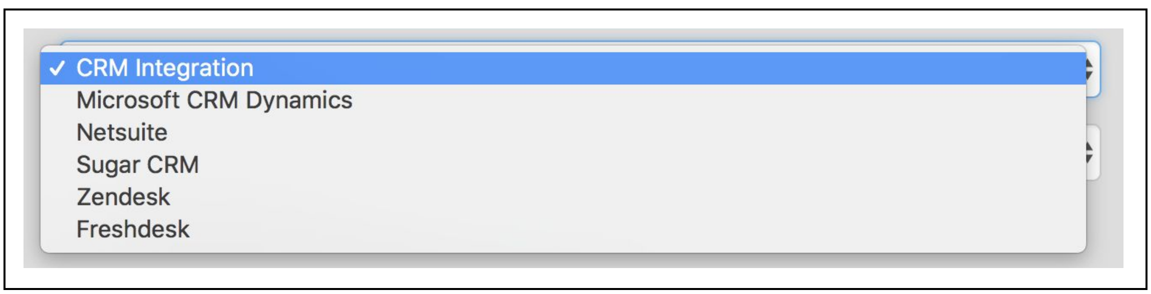
Widget Sign Up

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



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

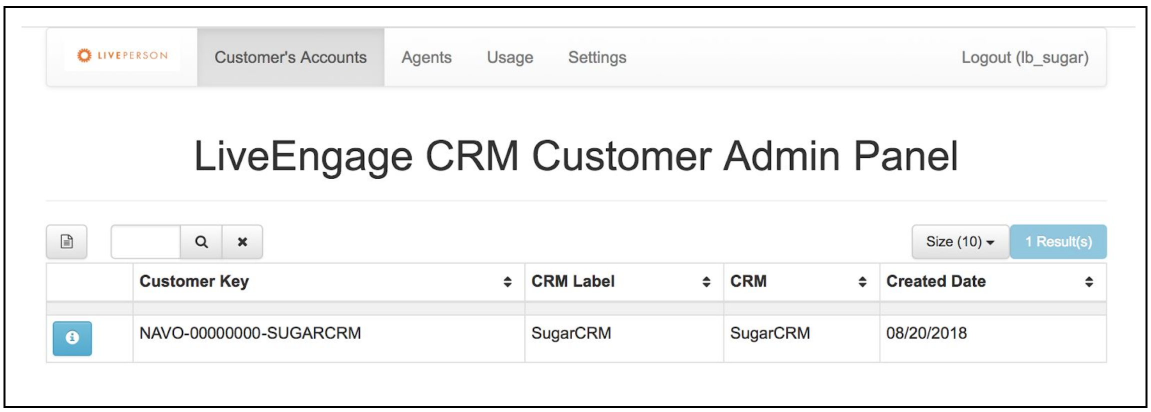
1. Make sure you receive the username and password from your Account Manager.
2. Go to the installation URL: https://lpcrm.fs.liveperson.com/admin-panel

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

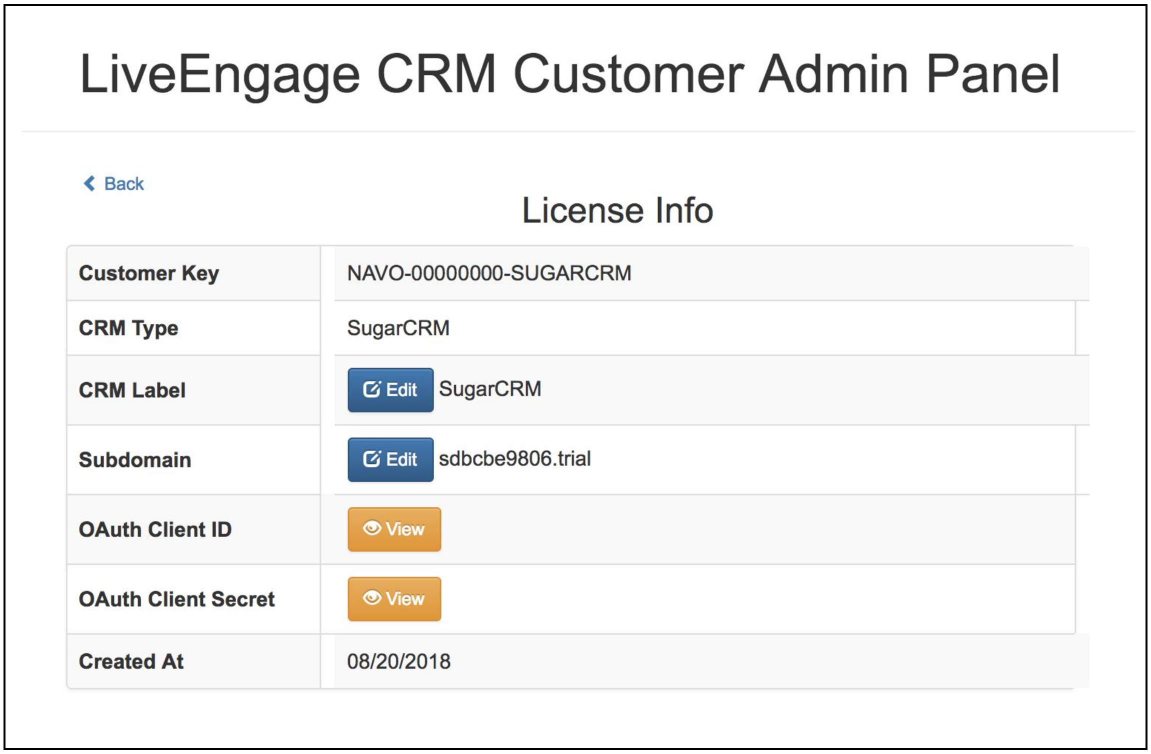


c. Click on the "info" icon next to the details of the customer key to modify connection to your CRM instance. Will be opened the License Info window.

License Info

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

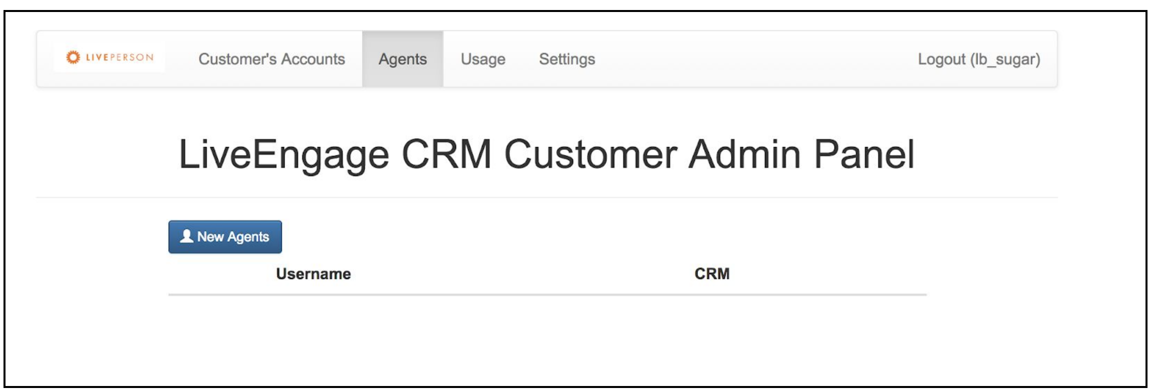
Here must be configures the connection to your CRM account. This is detailed in next section [Customer Accounts](#).



Agents (Deprecated)

Link: Admin Panel → Agents

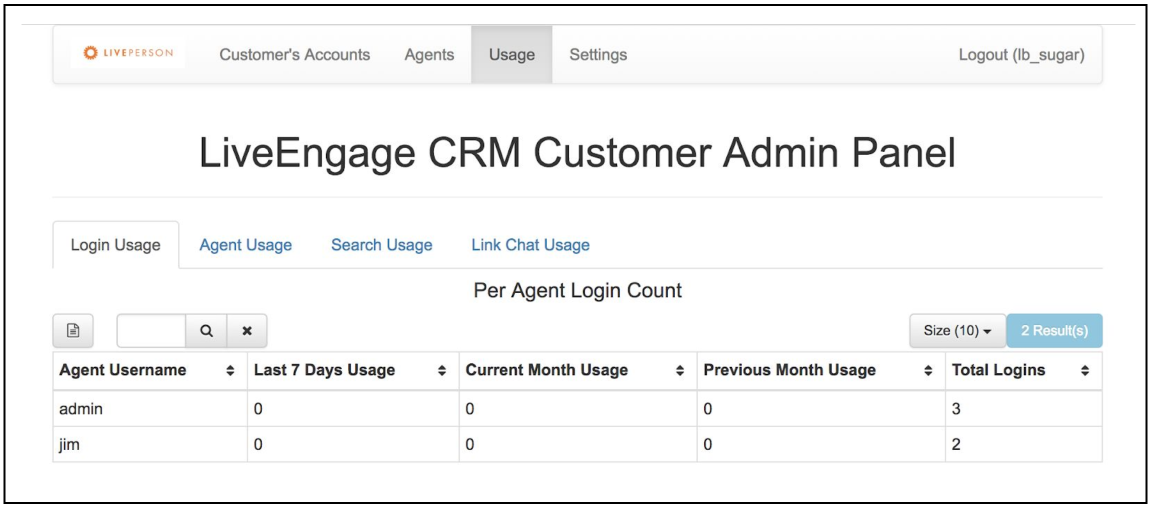
This session will not be addressed as it is deprecated



Usage

Link: Admin Panel → Usage

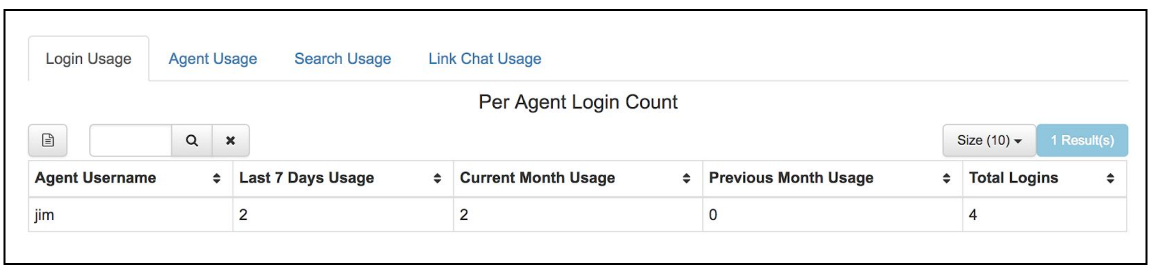
See the following usage statistics from the account:



Login Usage

See the login statistics from each Agent by:

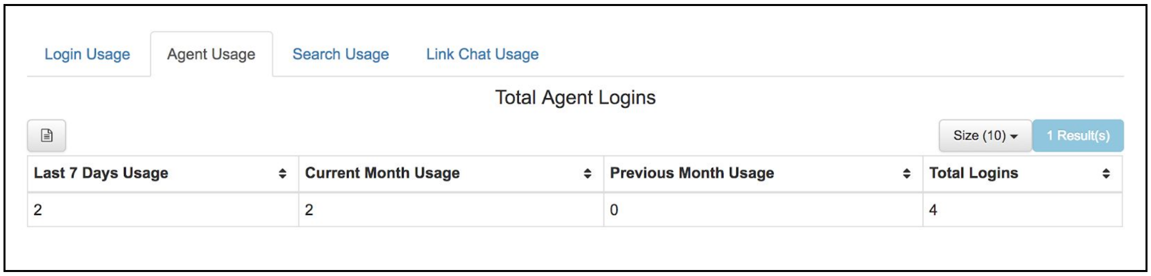
- Last 7 Days
- Currently Month
- Previous Month
- Total Logins



Agent Usage

See the login statistics from all Agents by:

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

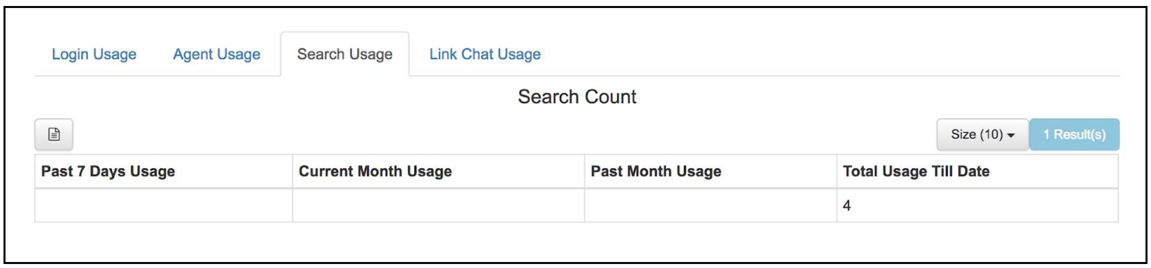


Last 7 Days Usage	Current Month Usage	Previous Month Usage	Total Logins
2	2	0	4

Search Usage:

See the search statistics from all Agents by:

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

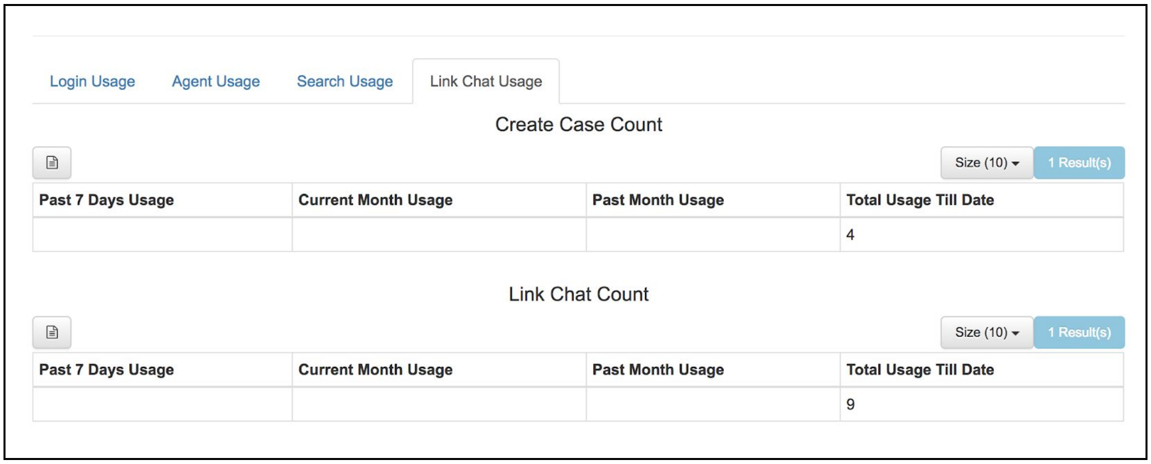


Past 7 Days Usage	Current Month Usage	Past Month Usage	Total Usage Till Date
			4

Link Chat Usage:

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

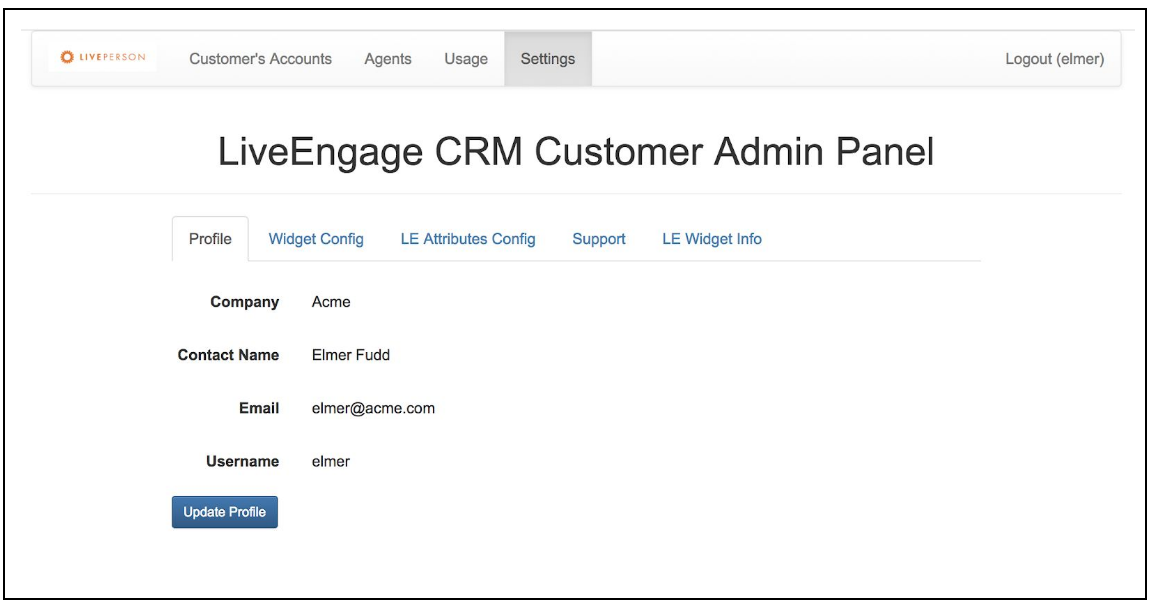
- Last 7 Days
- Currently Month
- Previous Month
- Total Usage Till Date



Settings

Link: Admin Panel → Settings

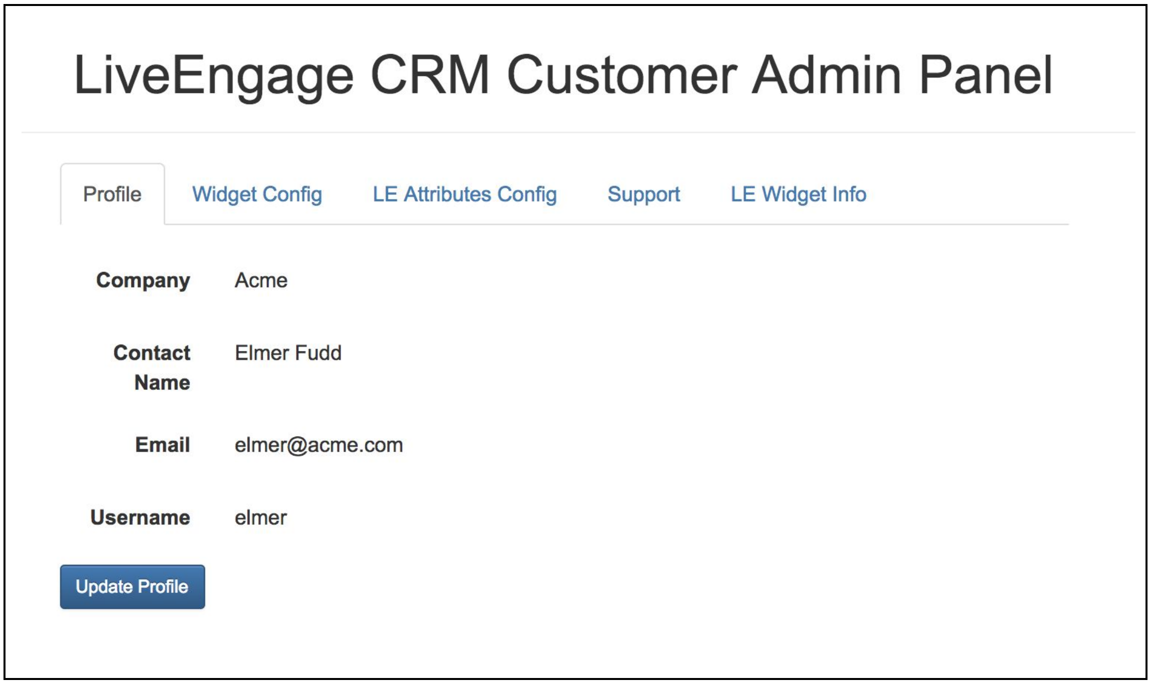
Here you can check and update your profile information.



Profile

Link: Admin Panel → Settings → Profile

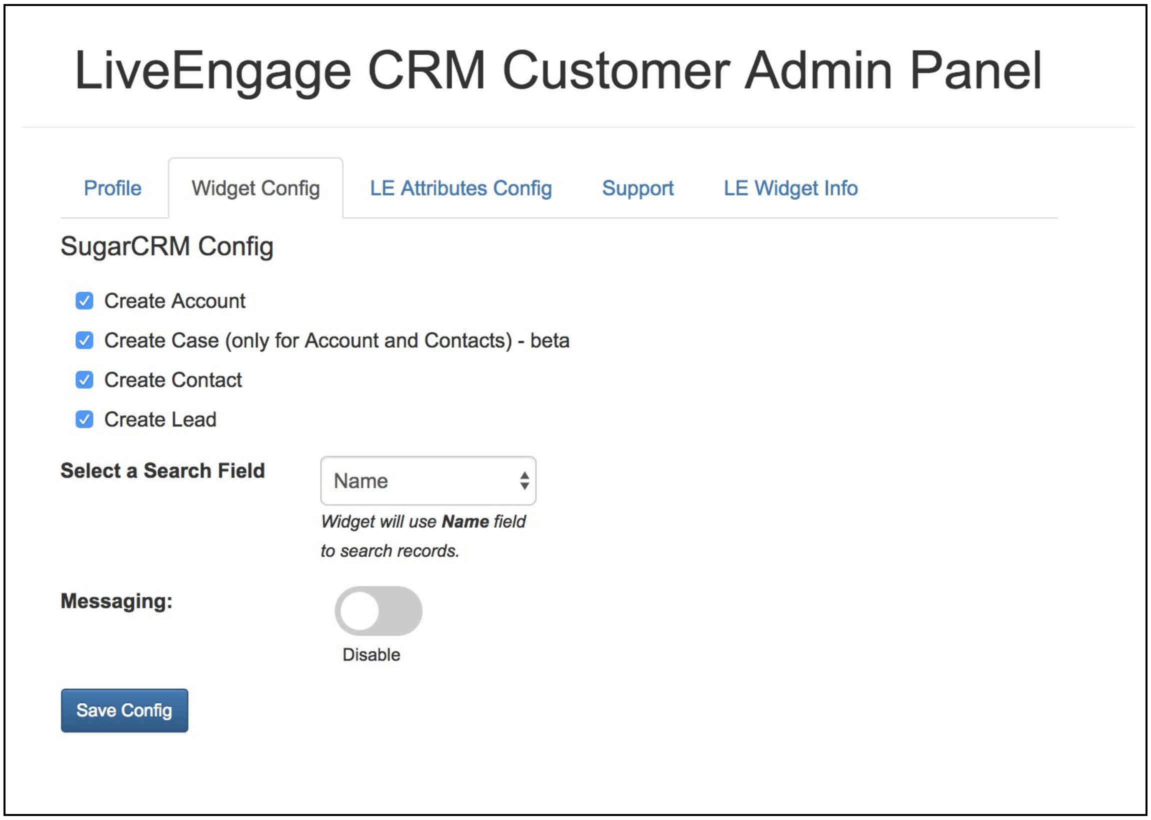
Here can verified your company profile information.
To update/change company profile information: Company Name, Contact Name, Email, Username, and Password.



Widget Config

Link: Admin Panel → Settings → Widget Config

This is detailed in the section Widget Config.



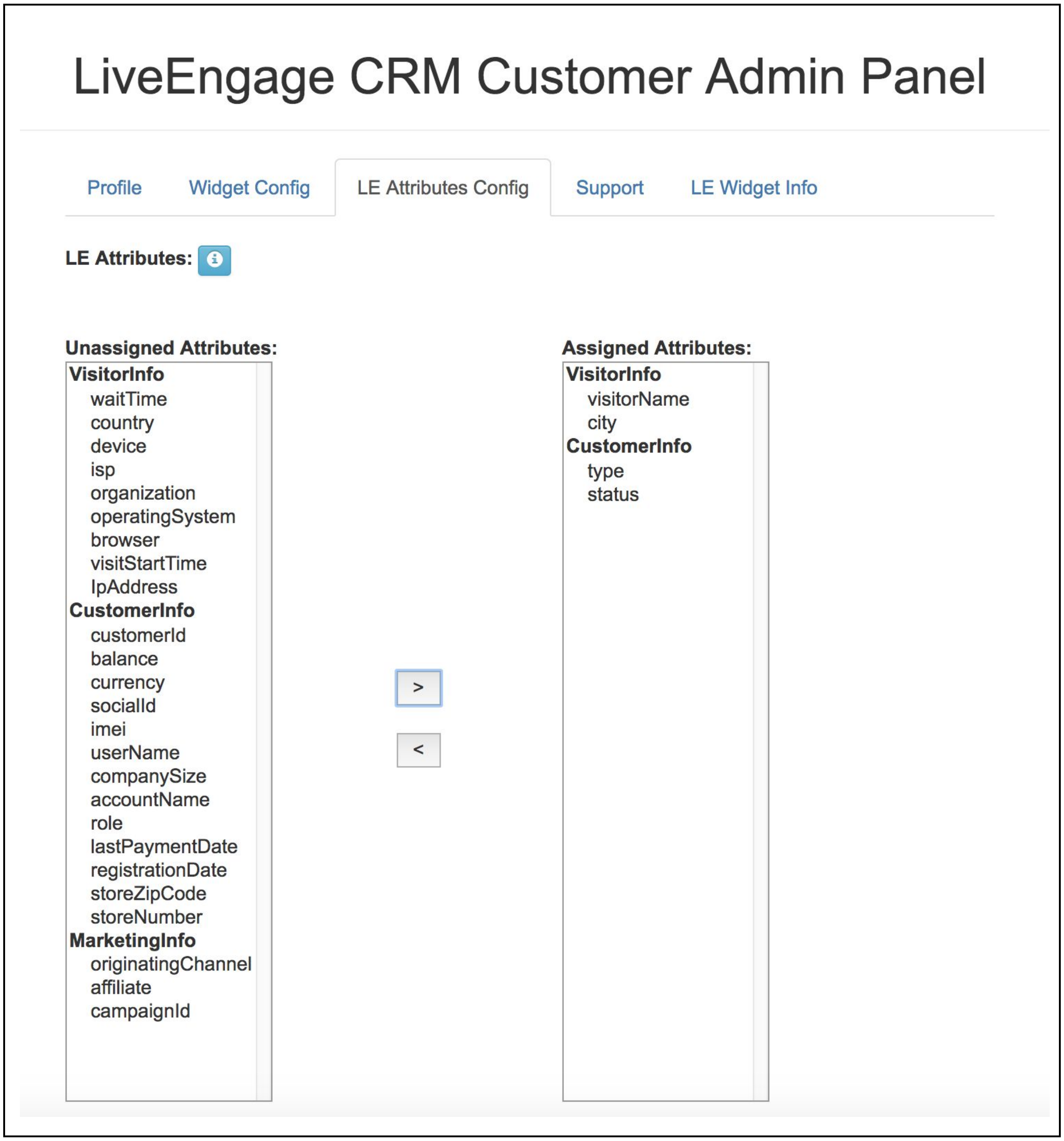
LE Attributes Config

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 < .

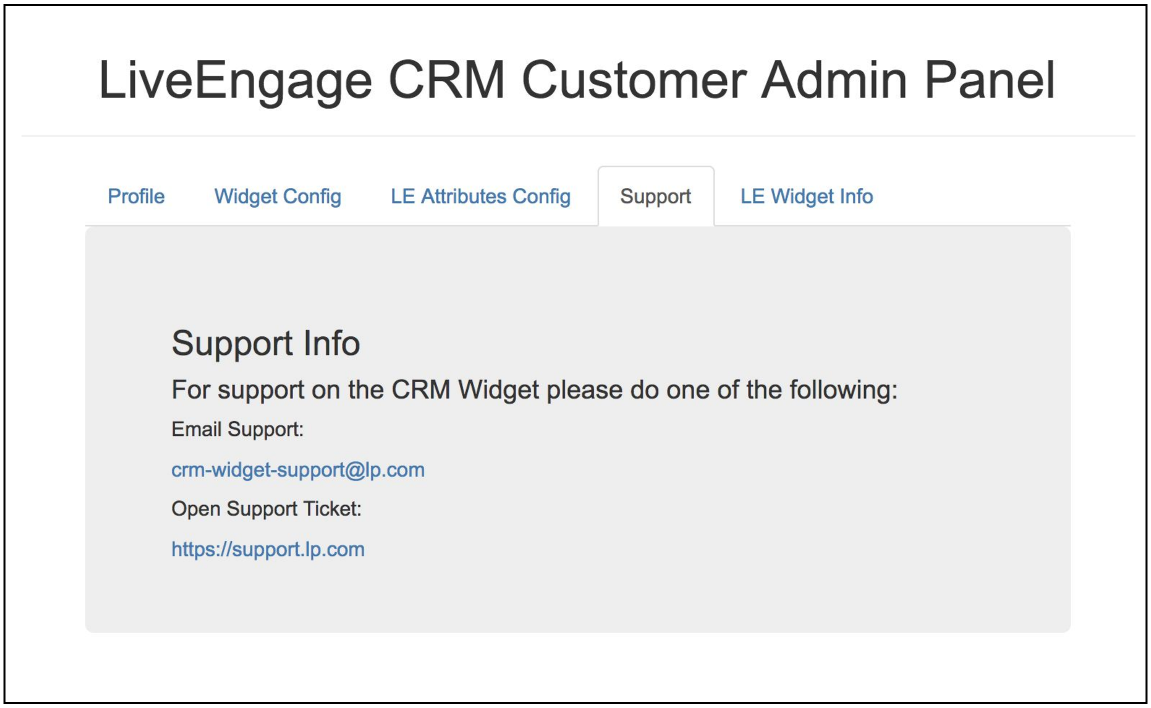
Note! For default, no one attribute is captured by Widget.



Support

Link: Admin Panel → Settings → Support

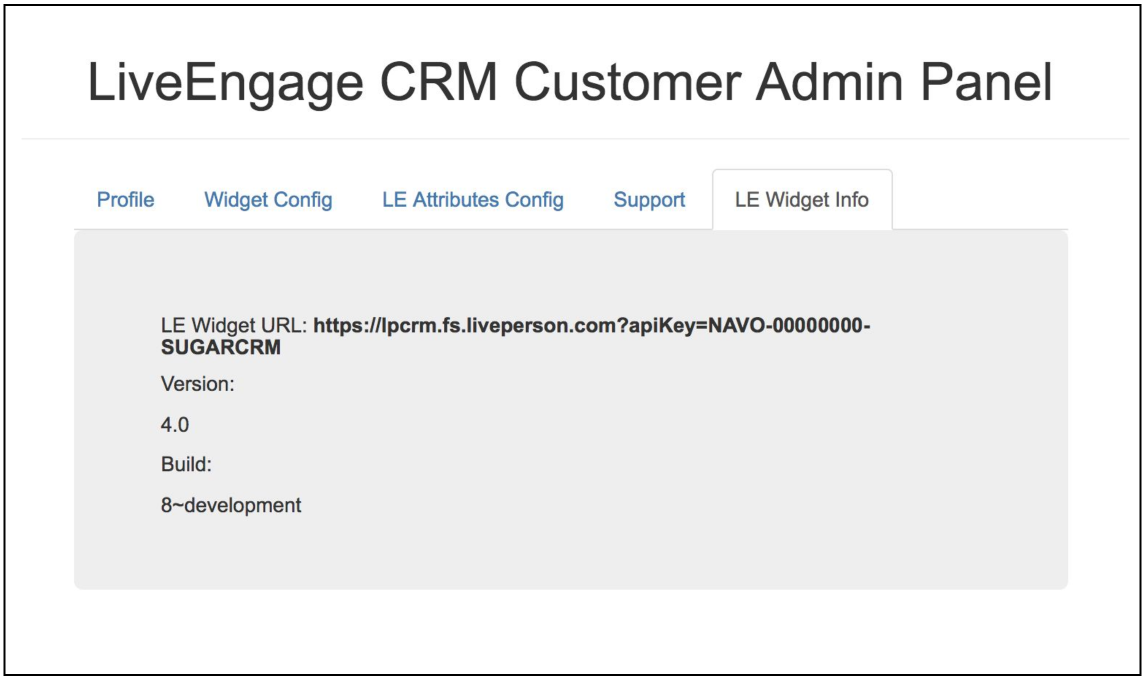
See support email and process to open a ticket for support.



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.

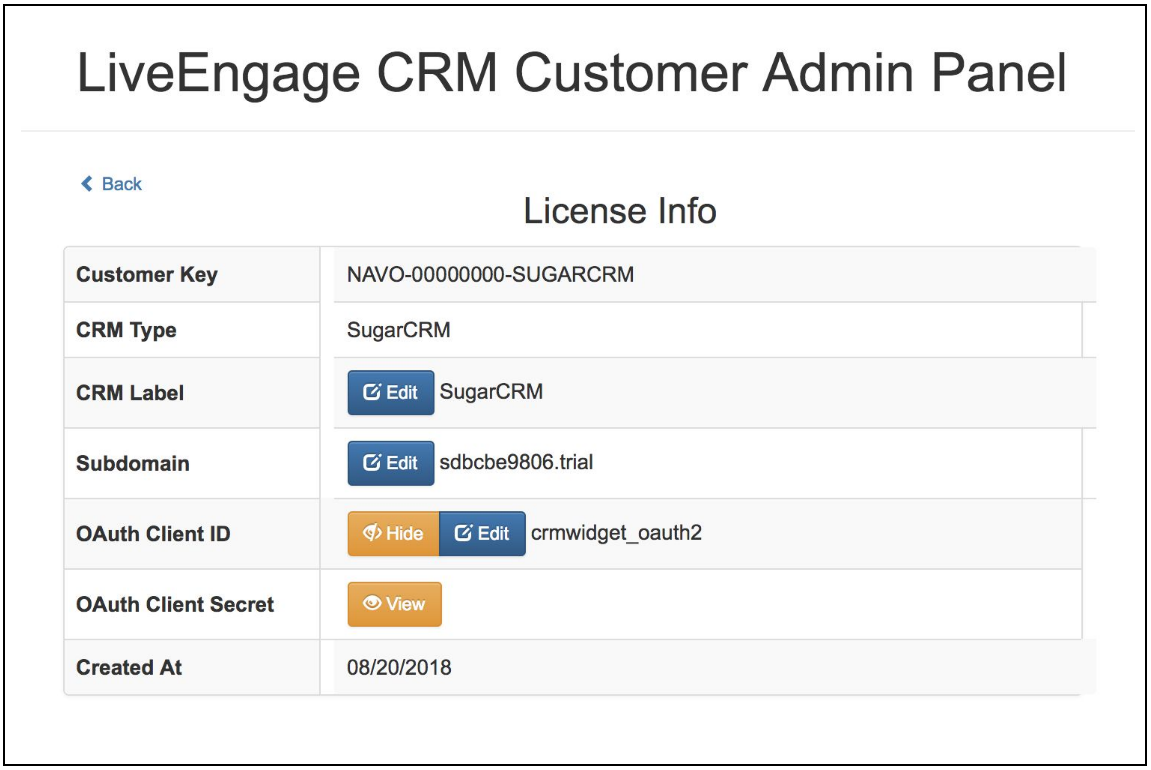


Customer Accounts

Link: Admin Panel → Customer's Accounts

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

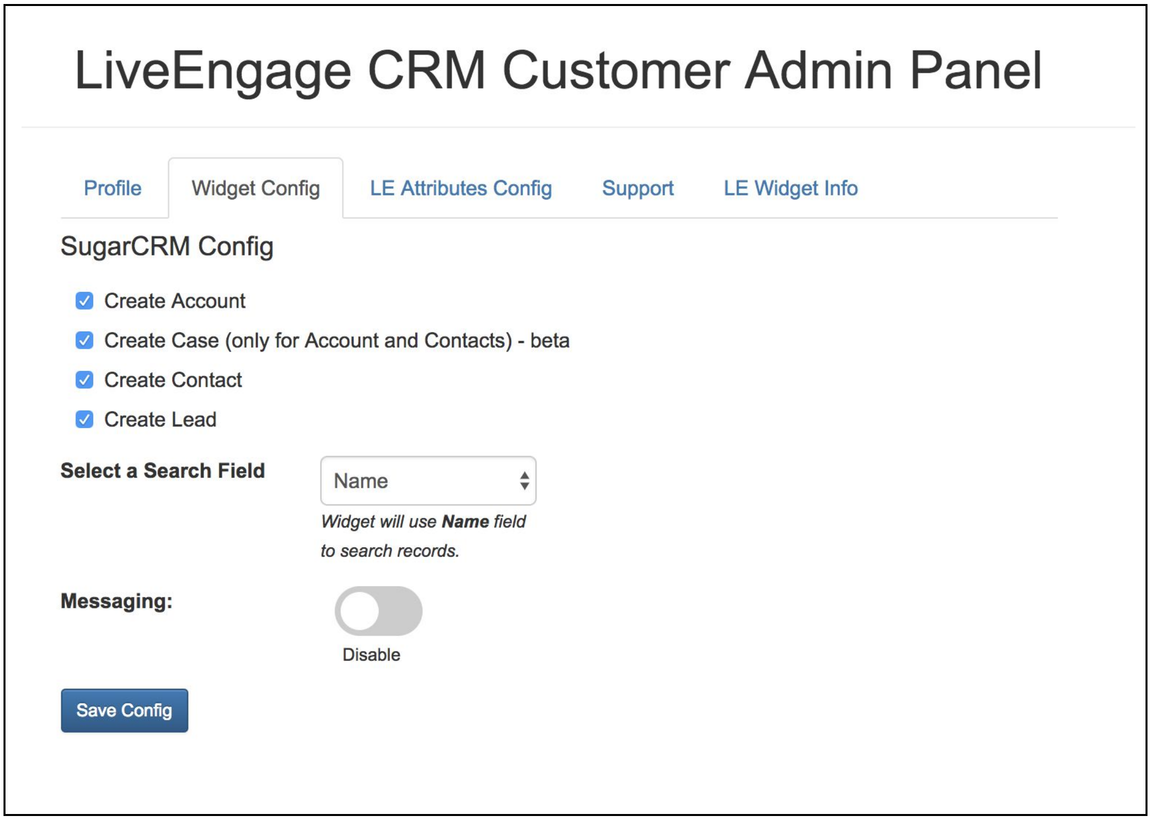
- Customer Key: This value is used to identify the license in the Live Engage.
- CRM Type: Which CRM is registered to this license.
- CRM label: Name to identify the current license.
- Subdomain: The main link part of CRM address. (https://<subdomain>.sugarcrm.com)
- OAuth Client ID: Consumer Key value from SugarCRM
- OAuth Client Secret: Consumer Secret value from SugarCRM



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

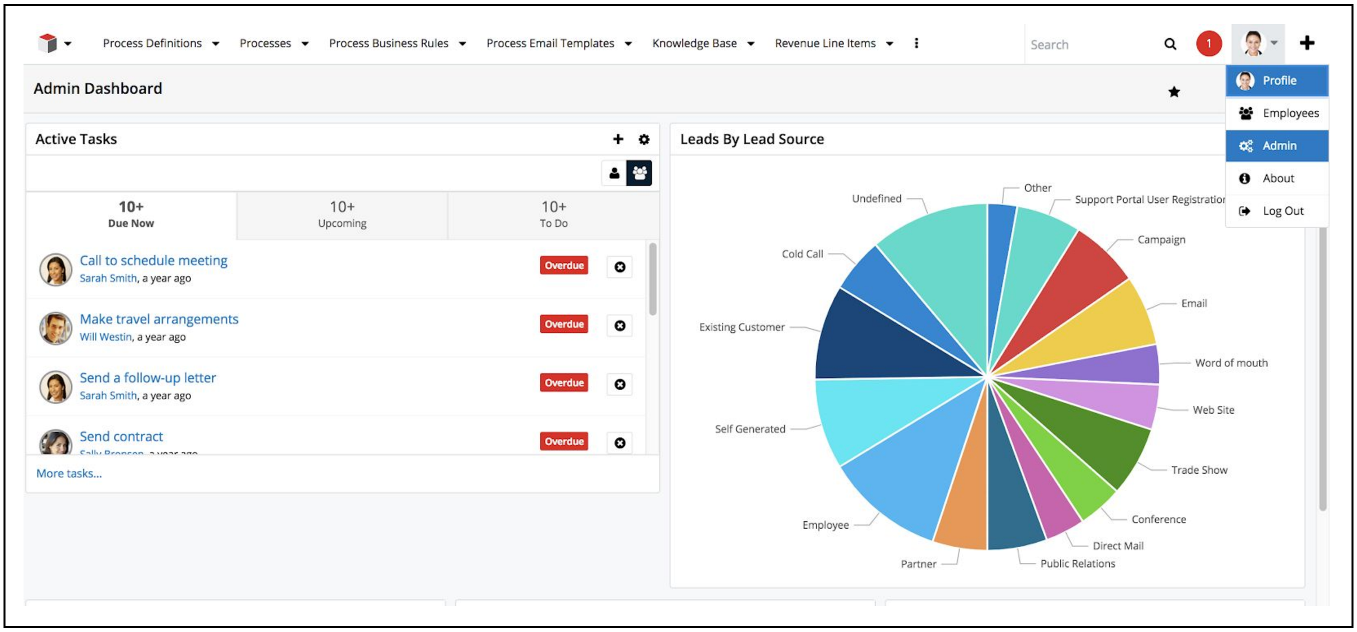
- Select a Search Field:
    - Name
    - Email
    - Phone

- Enabling/disabling Messaging

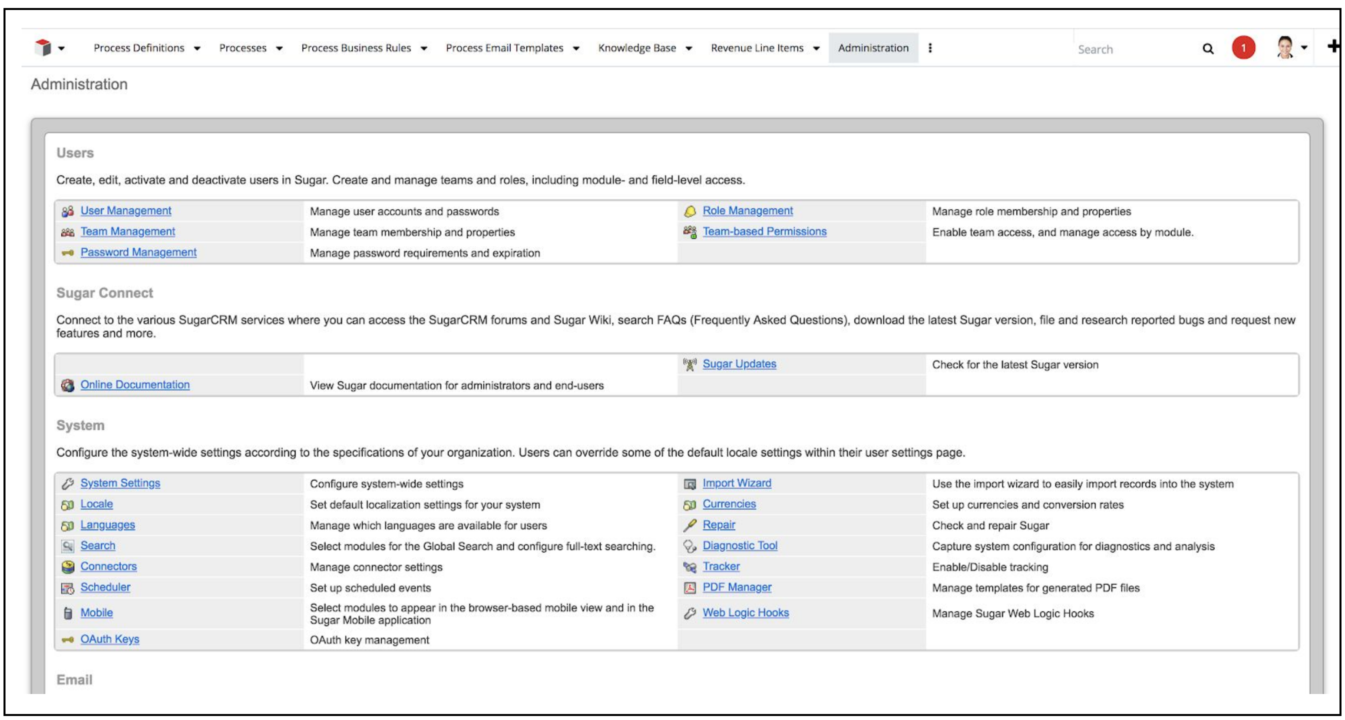
Configure CRM

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

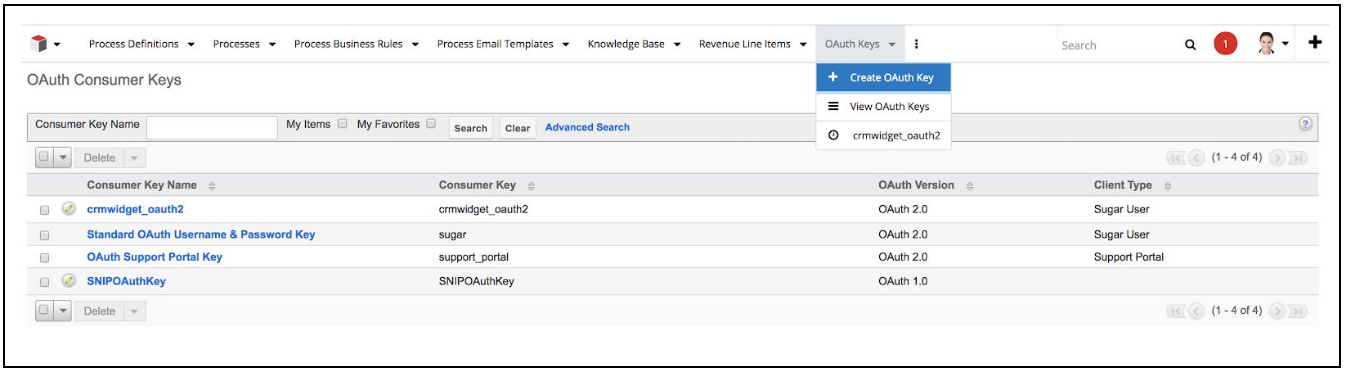
1. Login into your SugarCRM in another browser tab.
2. Click on your profile icon on top right and click on “Administrator”:



3. Click on “OAuth Keys” to setup a new oAuth.

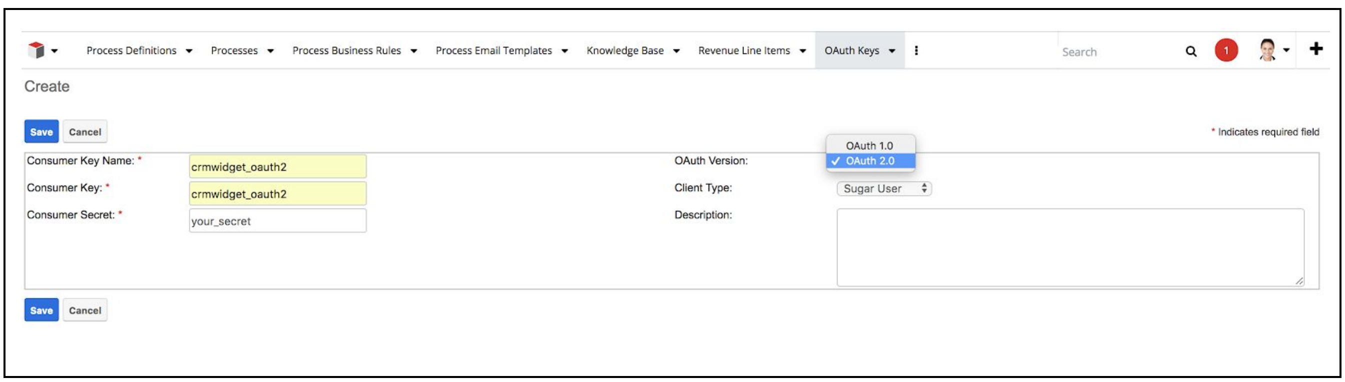


4. Then under “OAuth Keys” tab on the menu, click on “Create OAuth Key”:



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.

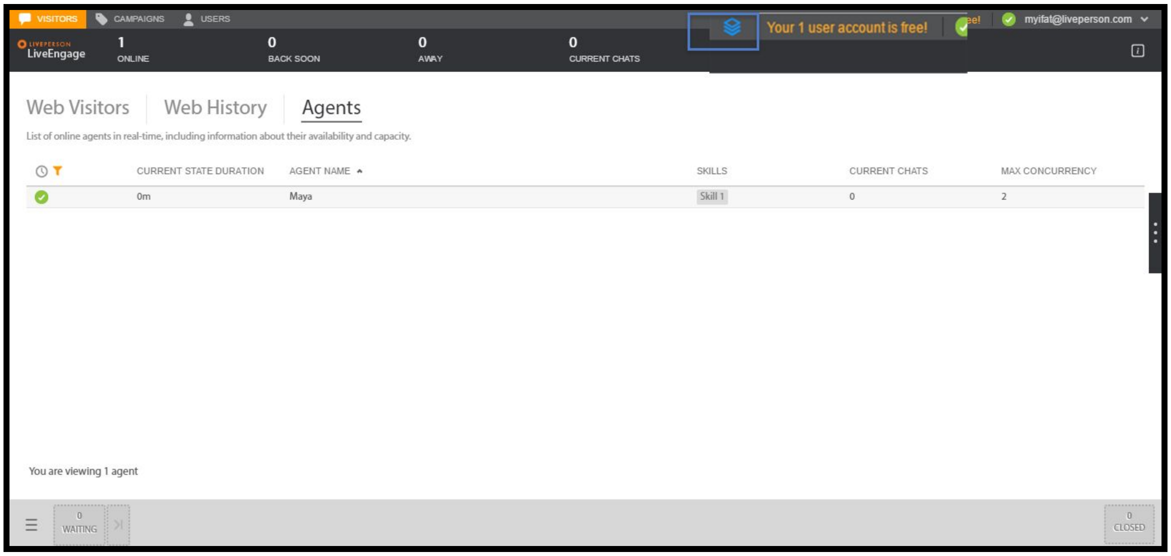


Adding Widget in LiveEngage Console

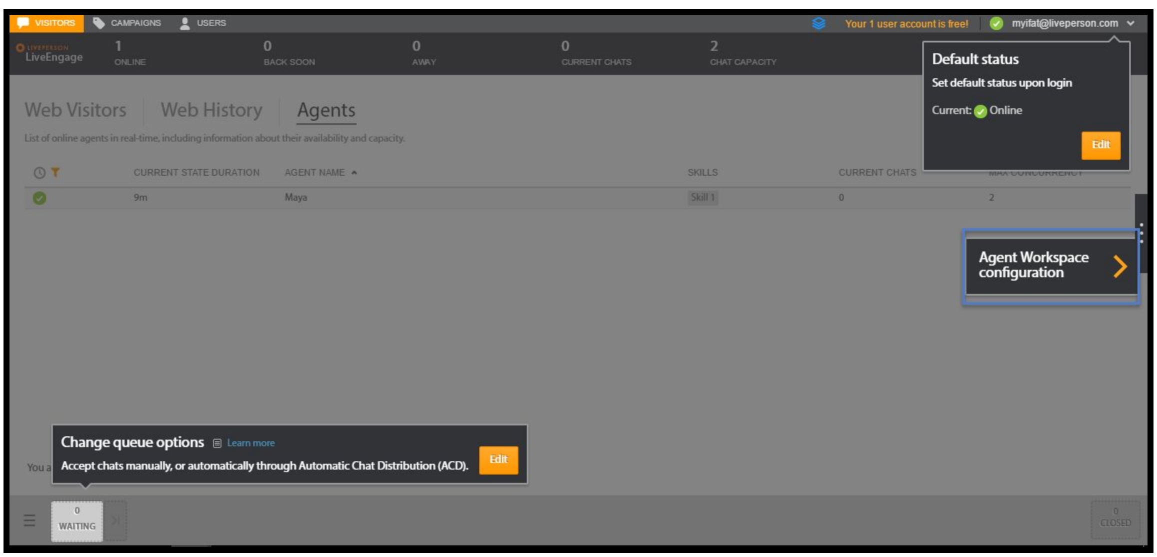
Now that you’ve updated the CRM Widget profile and license information, it is time to go to LiveEngage and configure the widget.

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

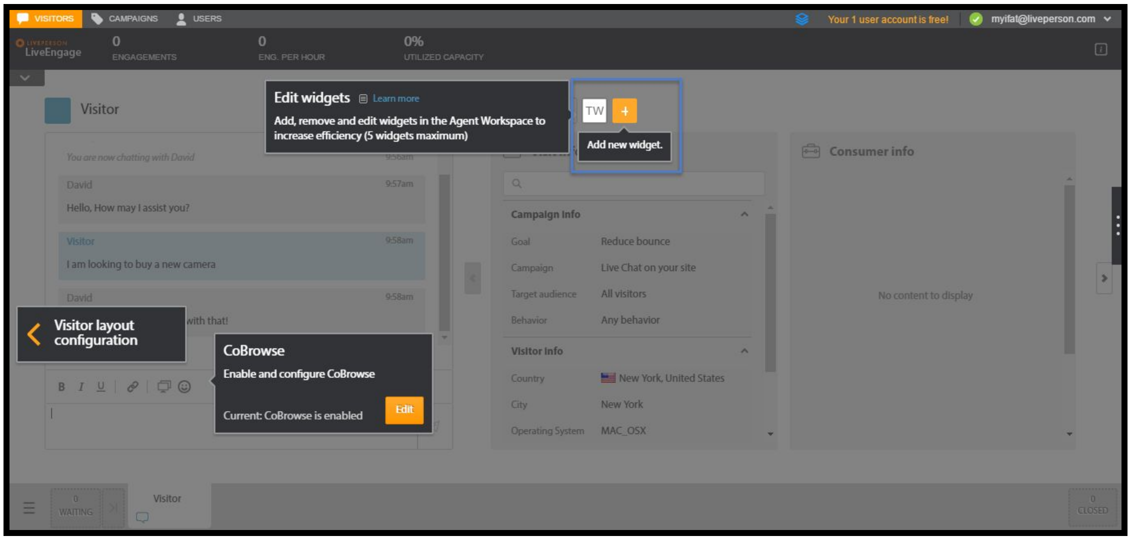
1. Access "Night Vision" settings menu: click on the icon on the top right of your screen as shown in the screenshot below:



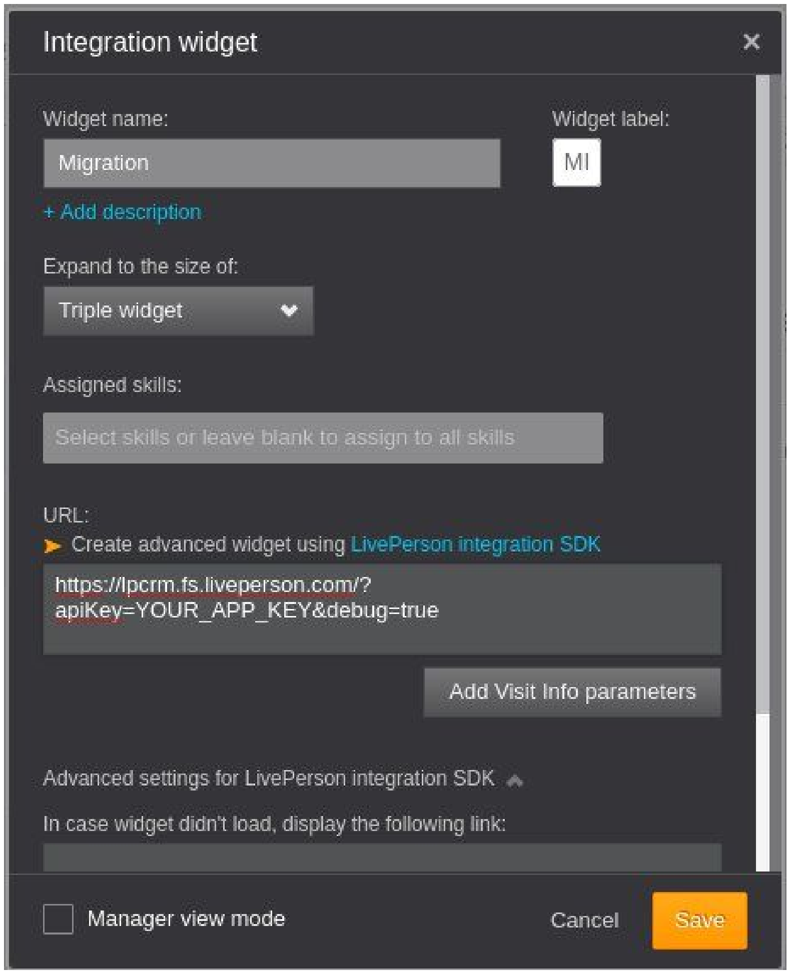
2. Once in Night Vision, click on "Agent Workspace Configuration"



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



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”



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.

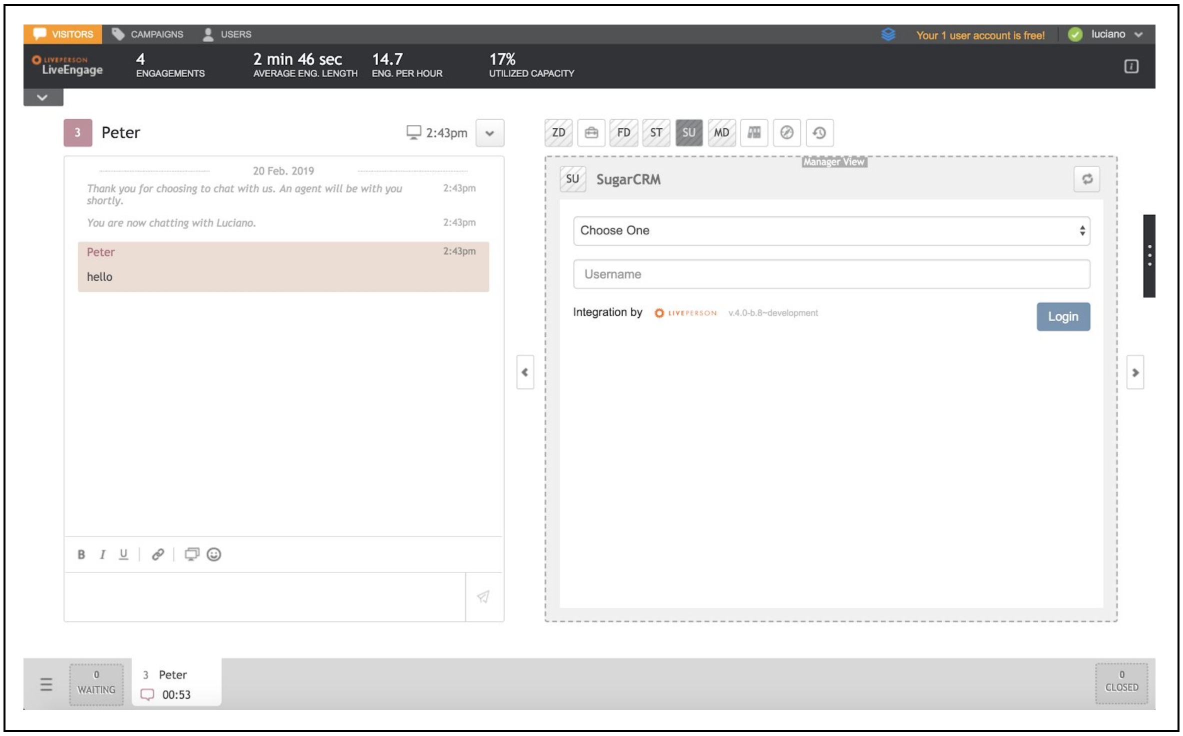
Overview

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

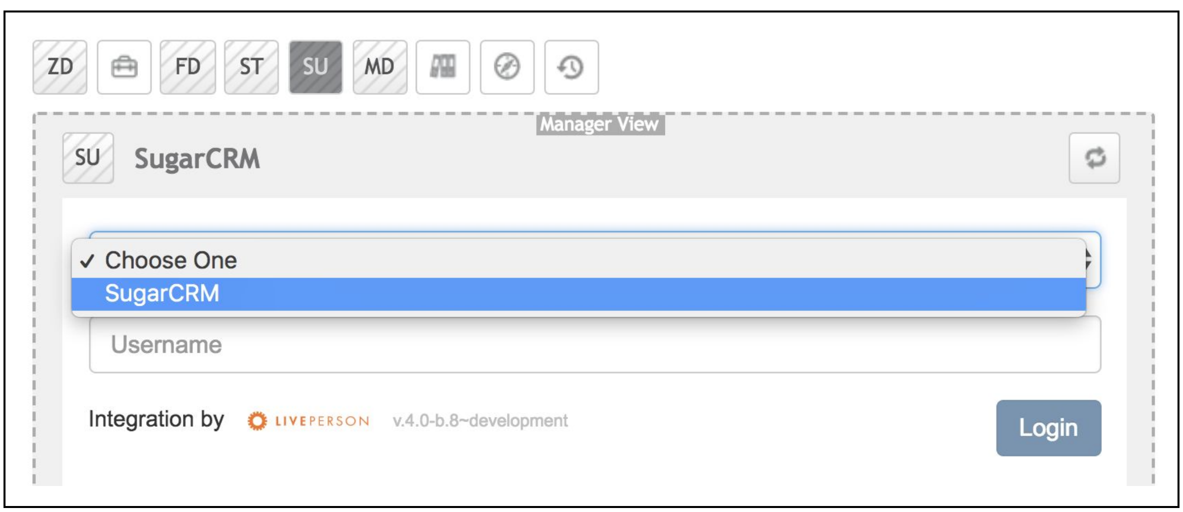
To start working on the new widget, accept a chat, click on "SugarCRM" widget, login and you can view Contacts and Leads and create Accounts, Leads, Contacts and Cases directly in LiveEngage.



Login Widget

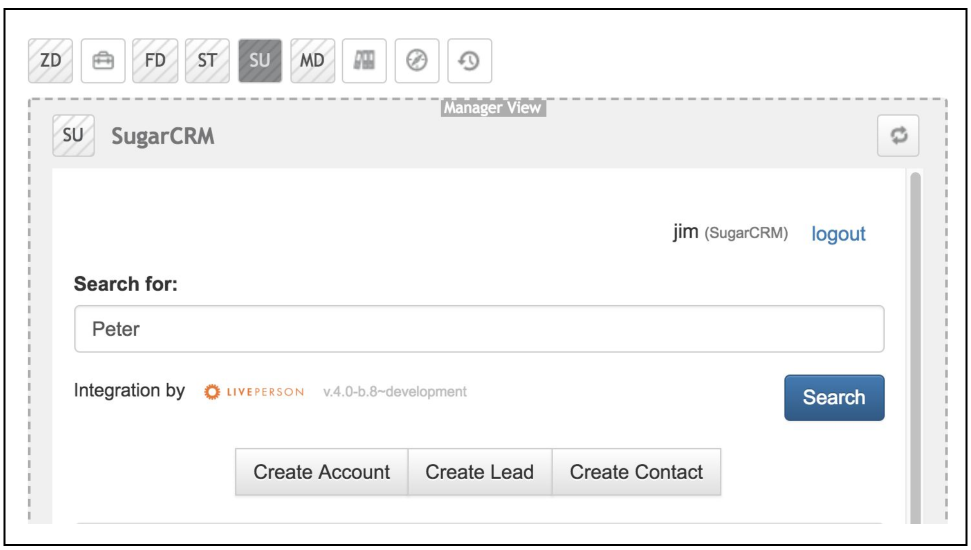
To be able to access the Widget functionalities, you must insert valid credentials to the registered CRM:

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

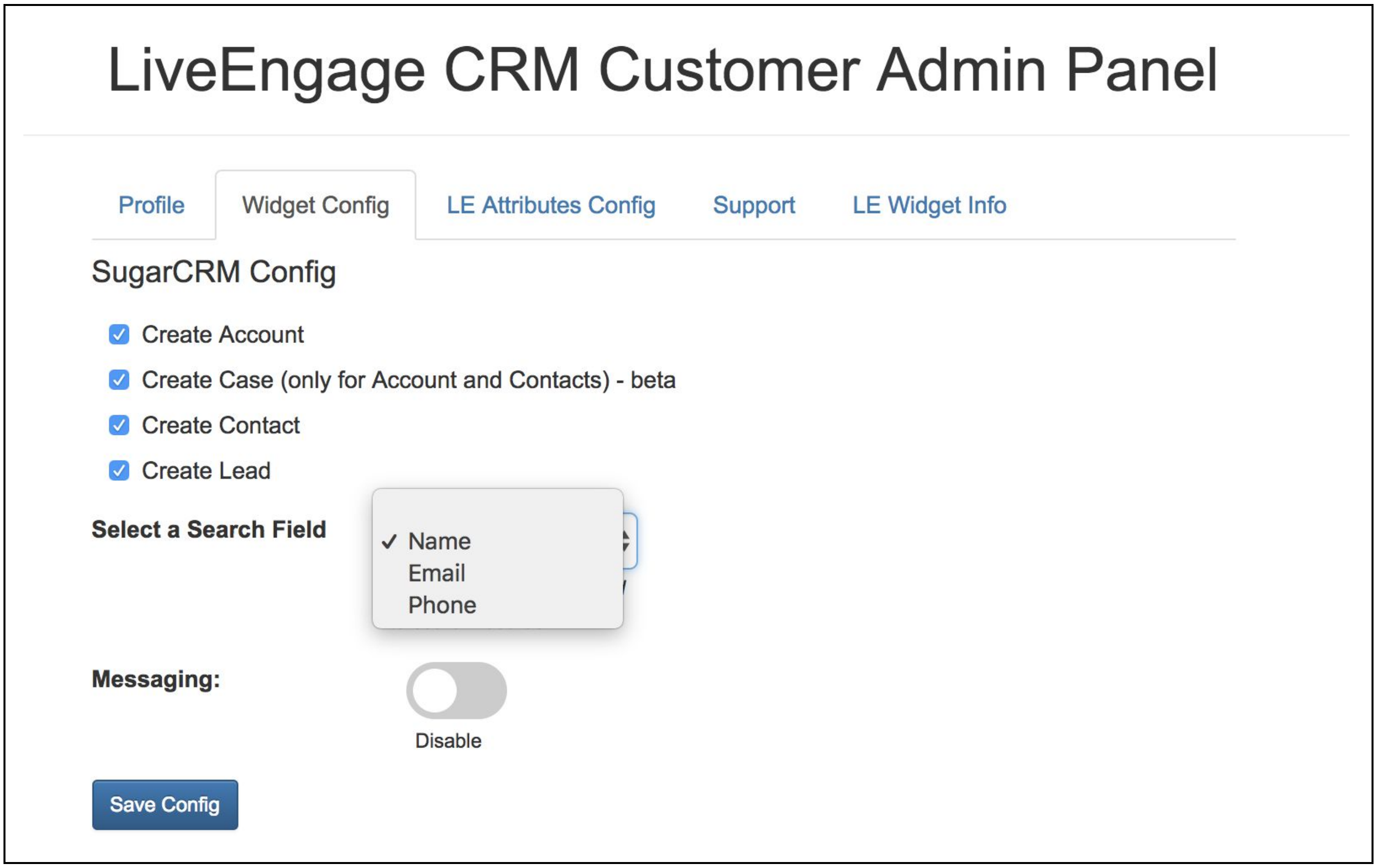
Note! If you have a visitor name in your pre-chat survey, the visitor name value will be automatically populated in the search string and the search will be performed once you click on the widget icon.

Search Records Filter/Fields

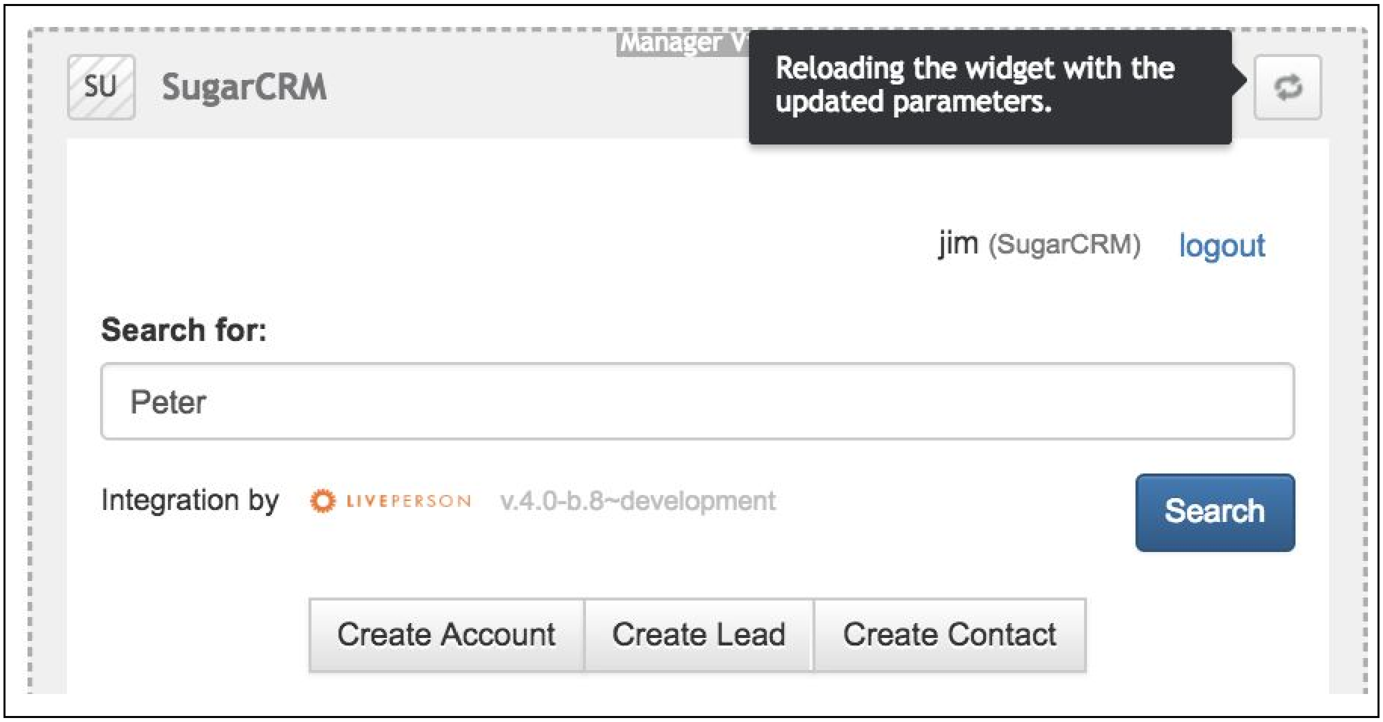
For SugarCRM there are options to filter searches by:

- 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.

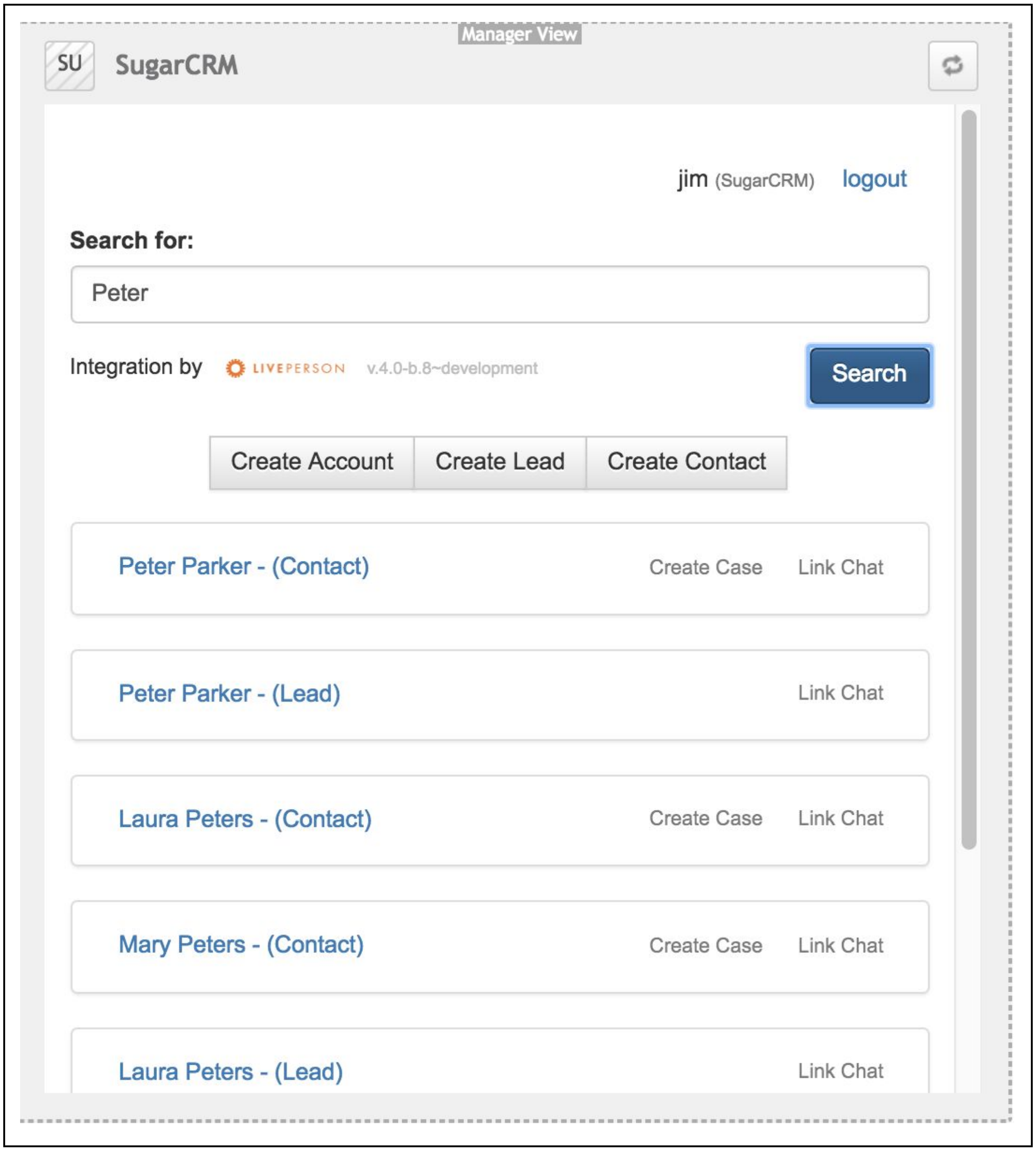


For new settings to take effect, you need to reload the widget in Live Engage. To do this, just click on the icon at the top of the widget on the right:

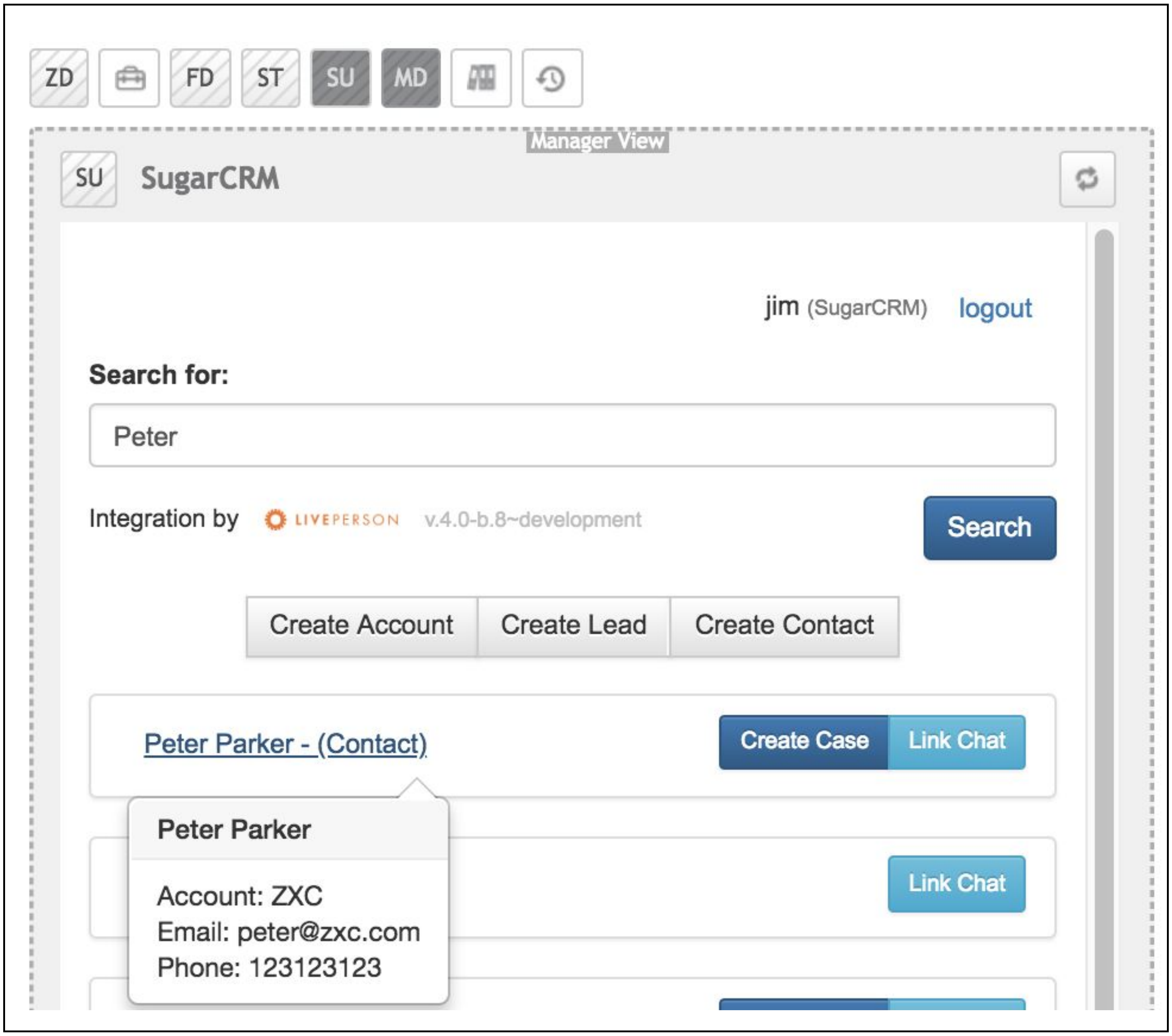


View Records

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).



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

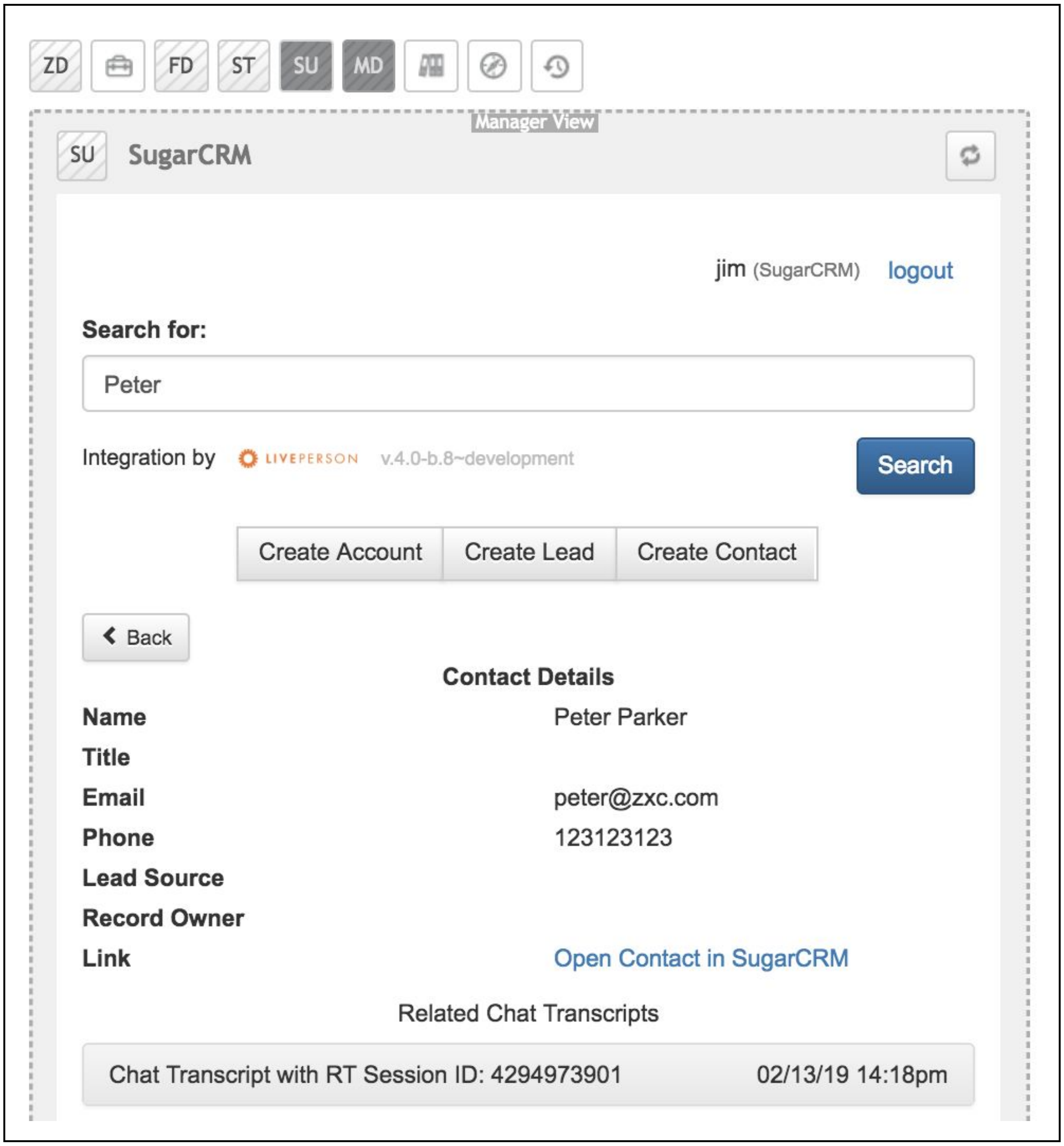


Clicking will display the item details. Here is an example of CONTACT:

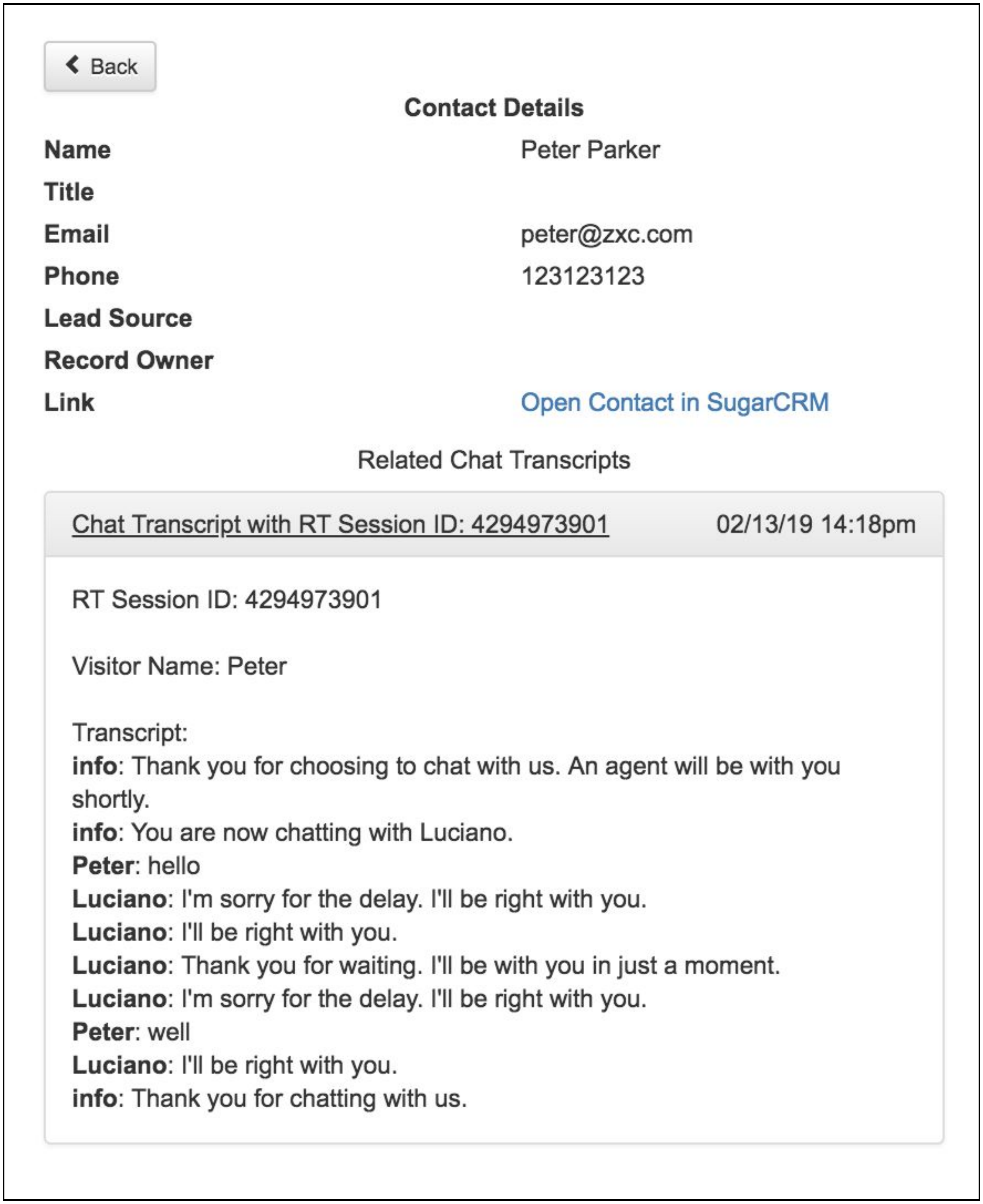
And here is an example of LEAD:

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:

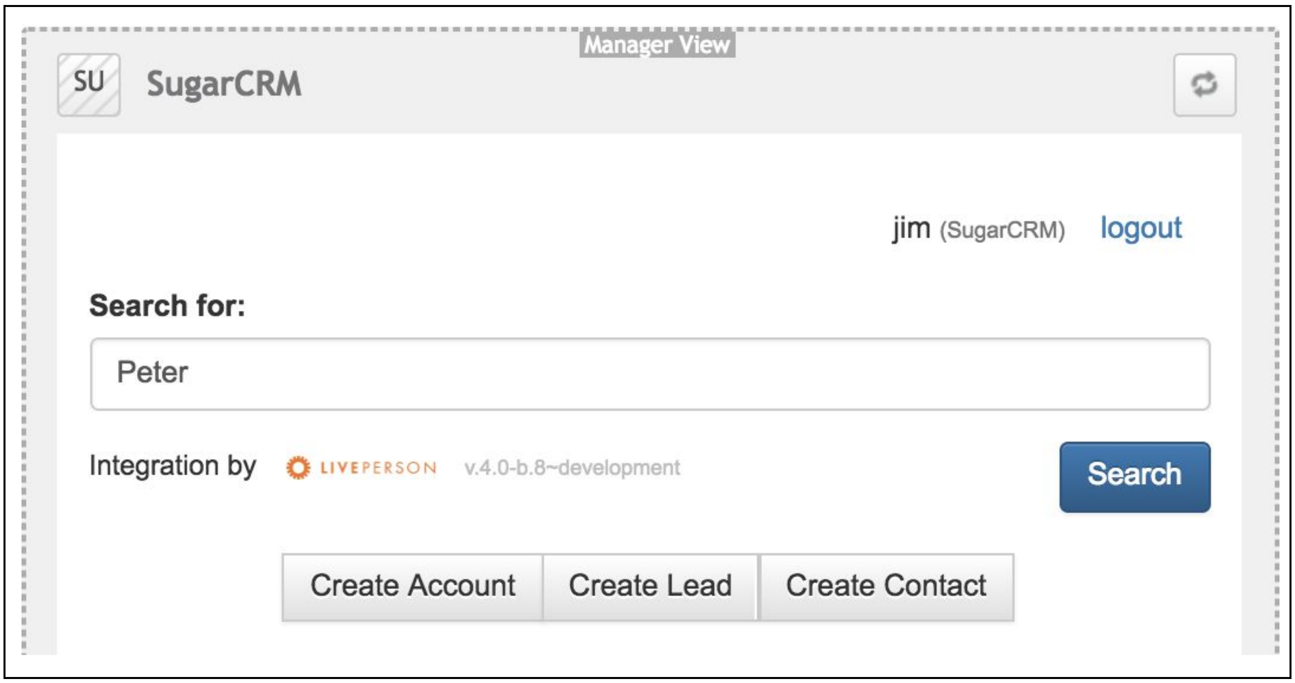

Back
Contact Details
Name
Peter Parker
Title
Email
peter@zxc.com
Phone
123123123
Lead Source
Record Owner
Link
Open Contact in SugarCRM
Related Chat Transcripts
Chat Transcript with RT Session ID: 4294973901
02/13/19 14:18pm
RT Session ID: 4294973901
Visitor Name: Peter
Transcript:
info: Thank you for 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.

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

Create New Records

The SugarCRM provide the following features:

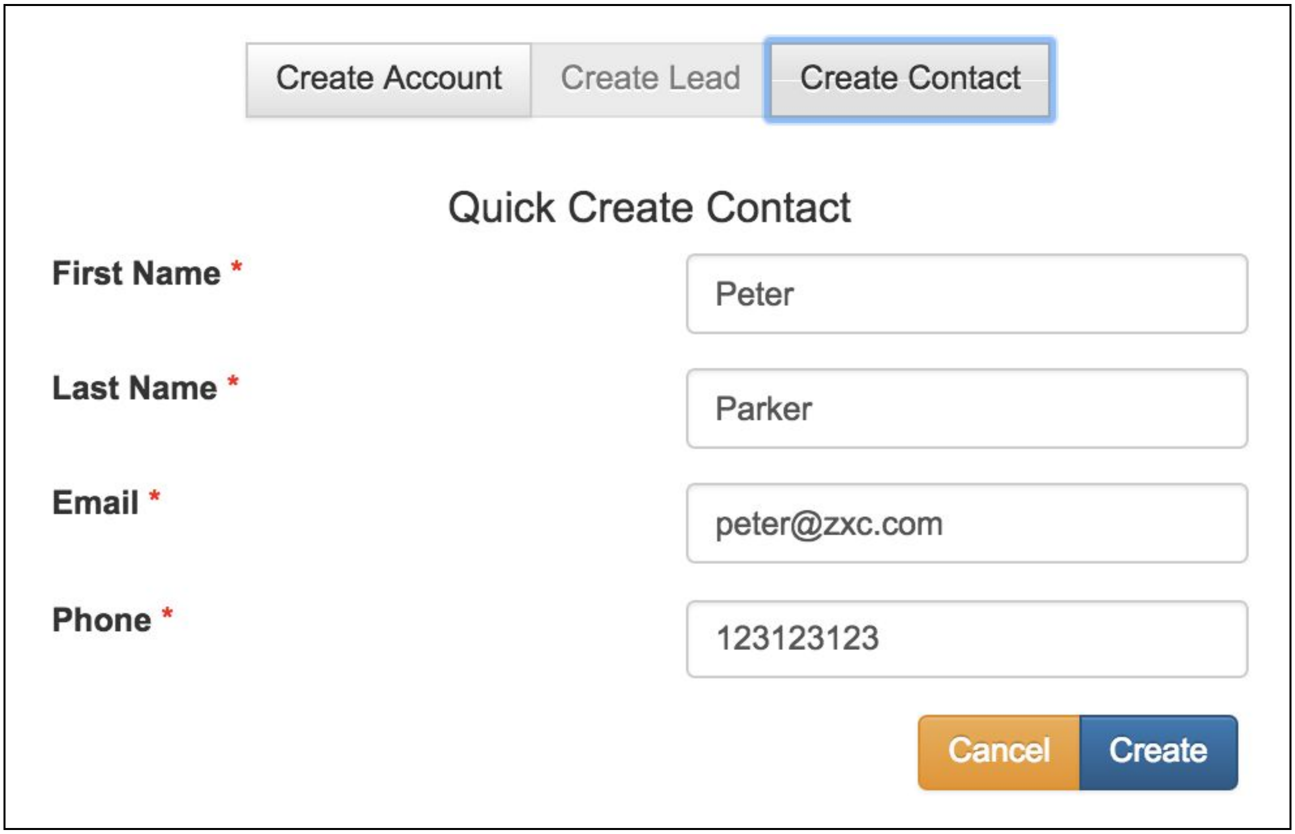
- Create Account
- Create Lead
- Create Contact
- Create Case



Create Contact

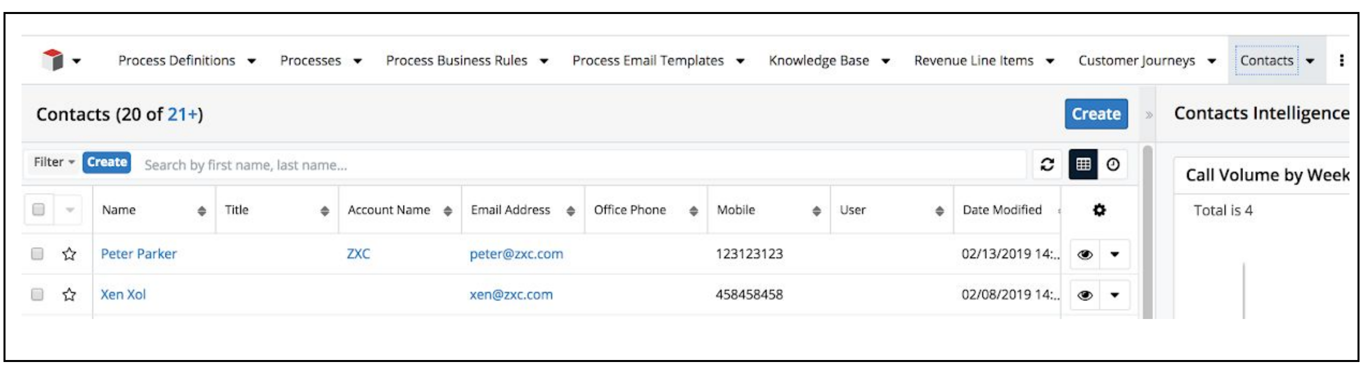
In case you want to create a new "Contact" record, click on "Create Contact".

- 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.

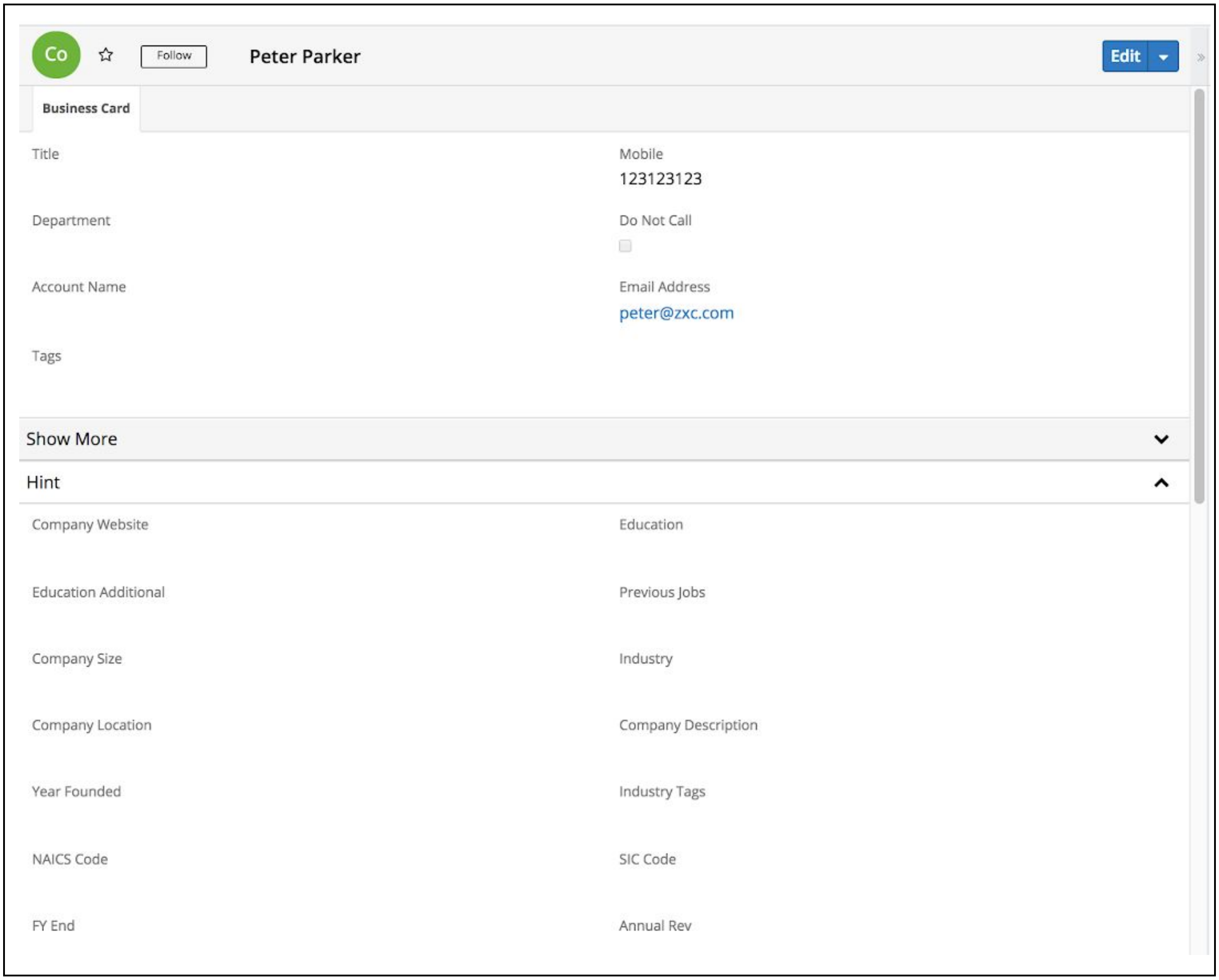


When the record is entered successfully, the message will be displayed:

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

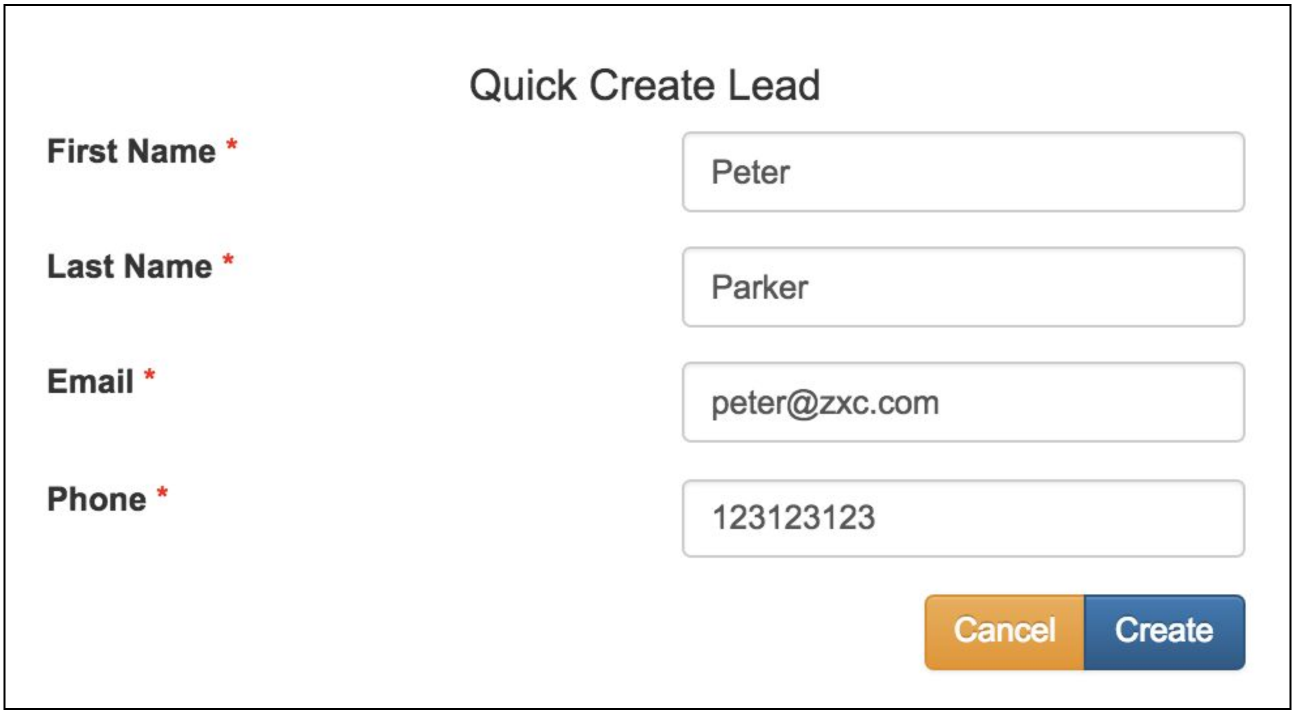


And when you click on a Contact, the window with the detailed data of this record opens:



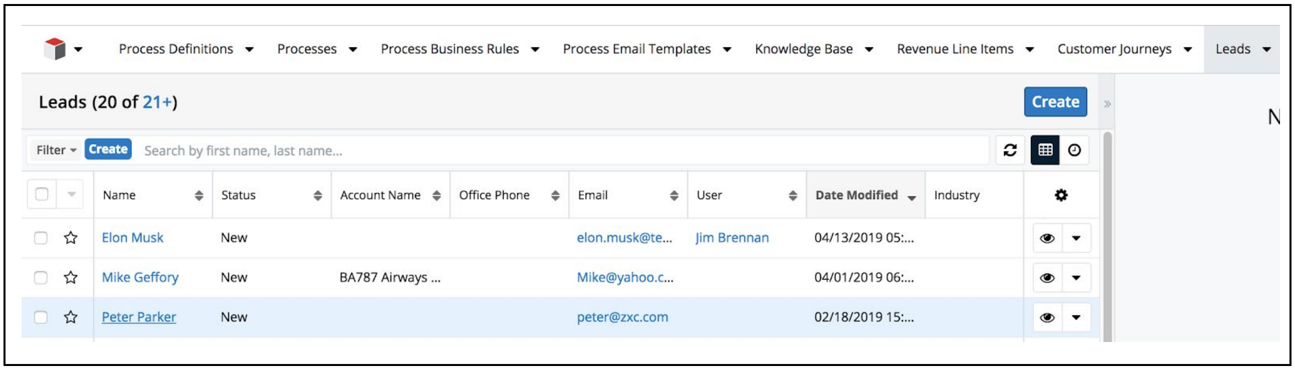
Create Lead

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

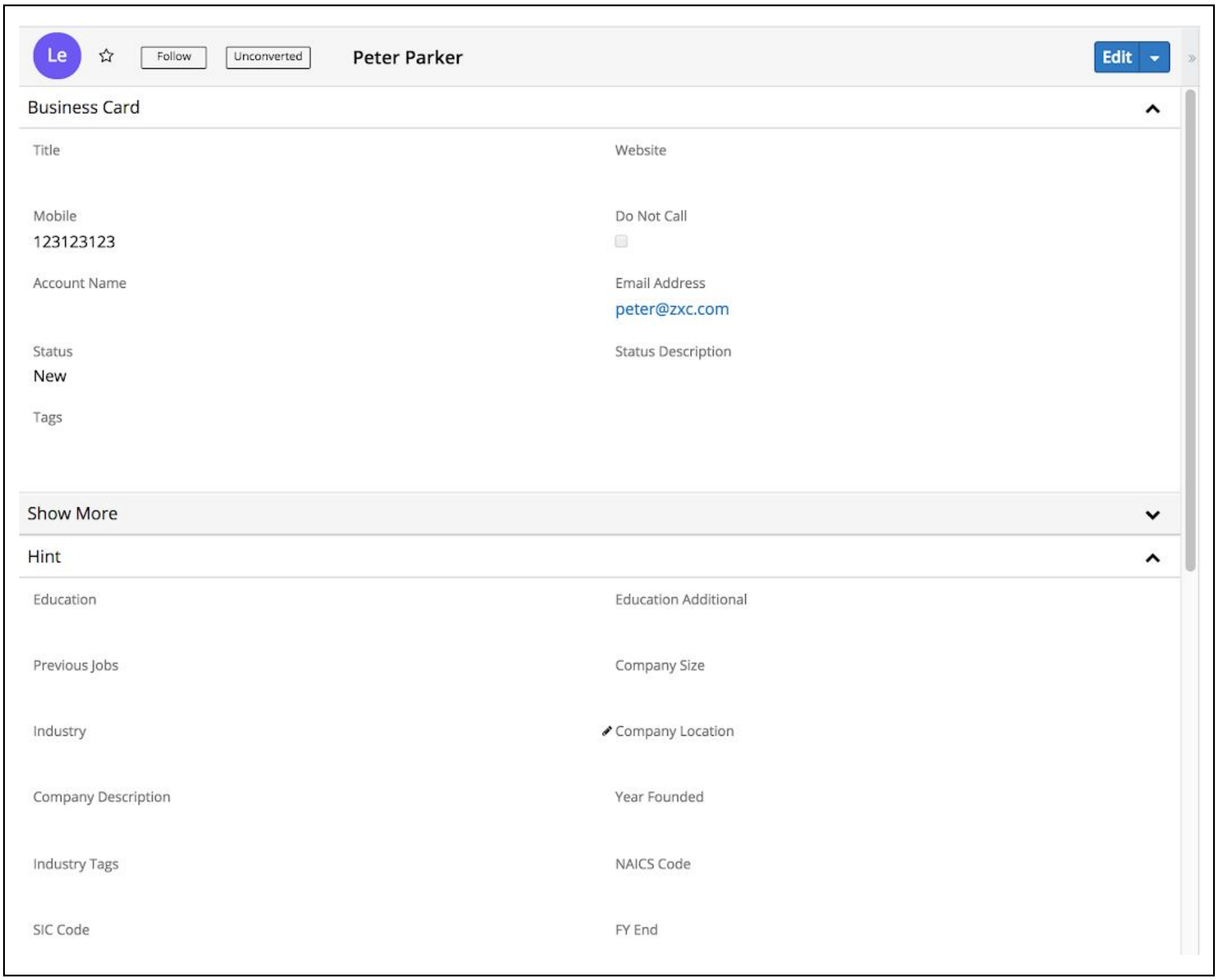


When the record is entered successfully, the message will be displayed:

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

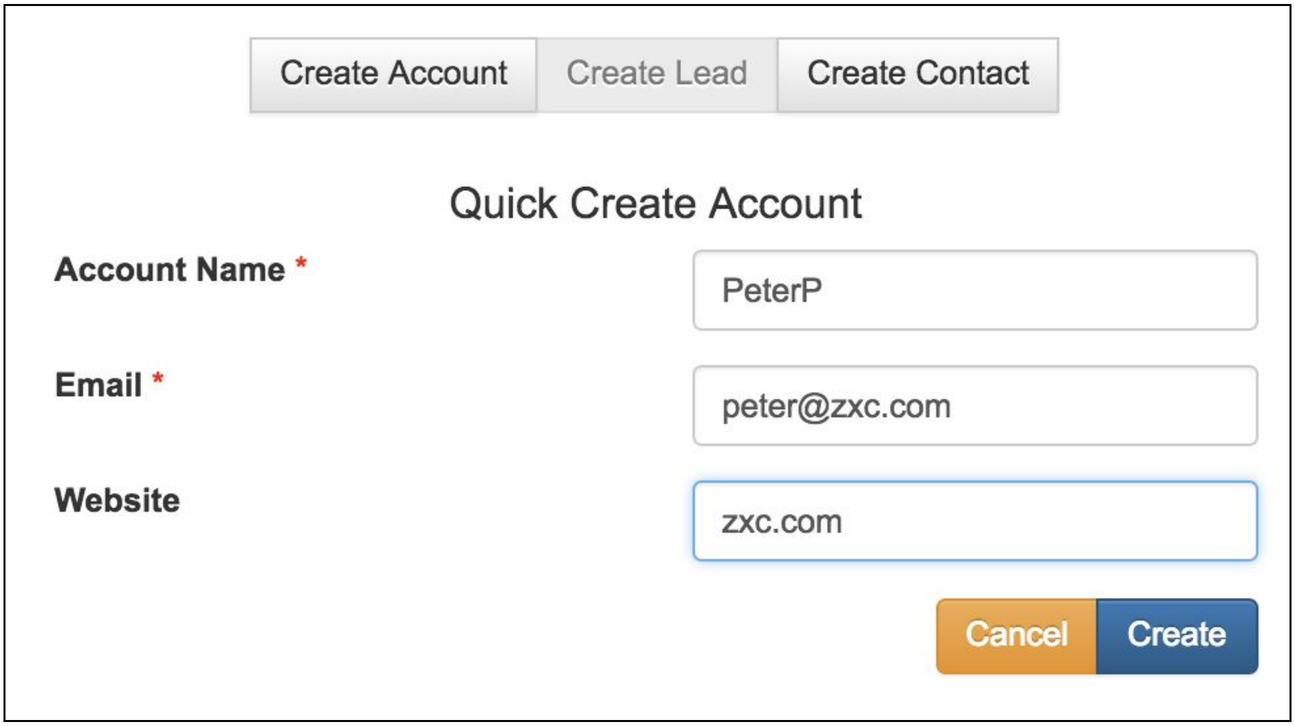


And when you click on a Lead, the window with the detailed data of this record opens:

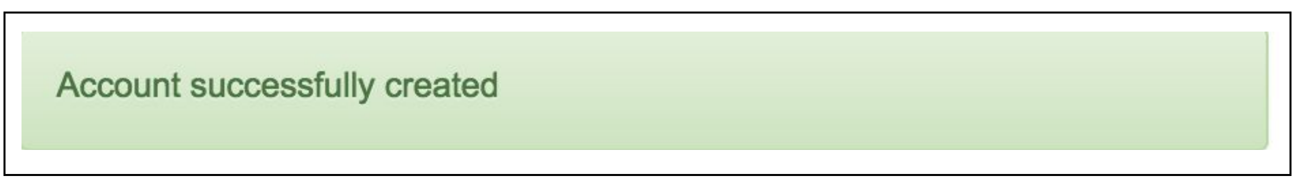


Create Account

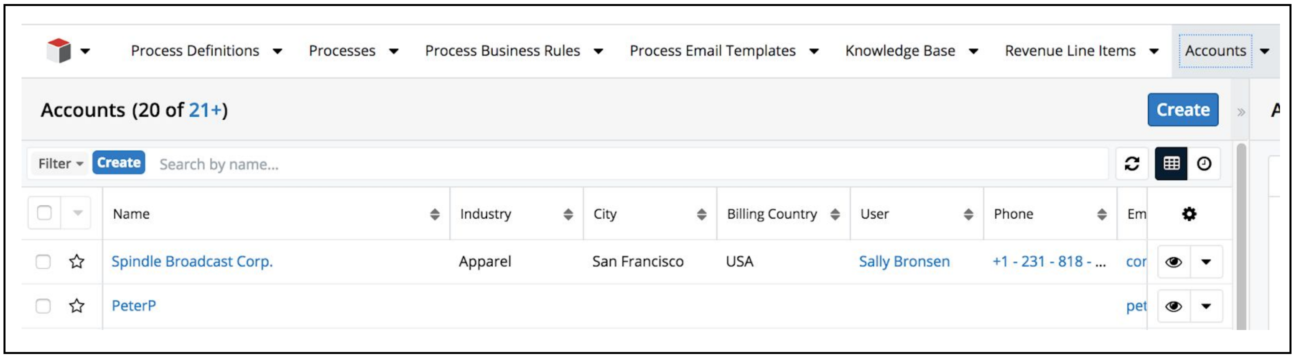
Click on "Create Account" button and fill out the relevant fields and click on "Create". Some of the field values are automatically copied over from pre-chat survey, if the user fill out one before initiating the Chat.



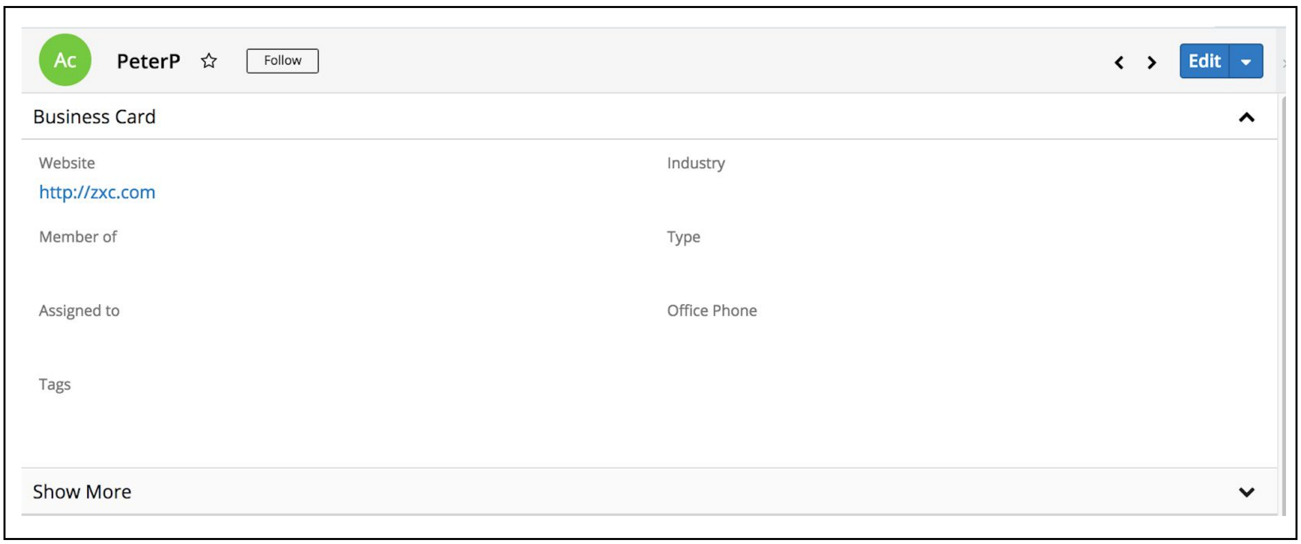
When the record is entered successfully, the message will be displayed:



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

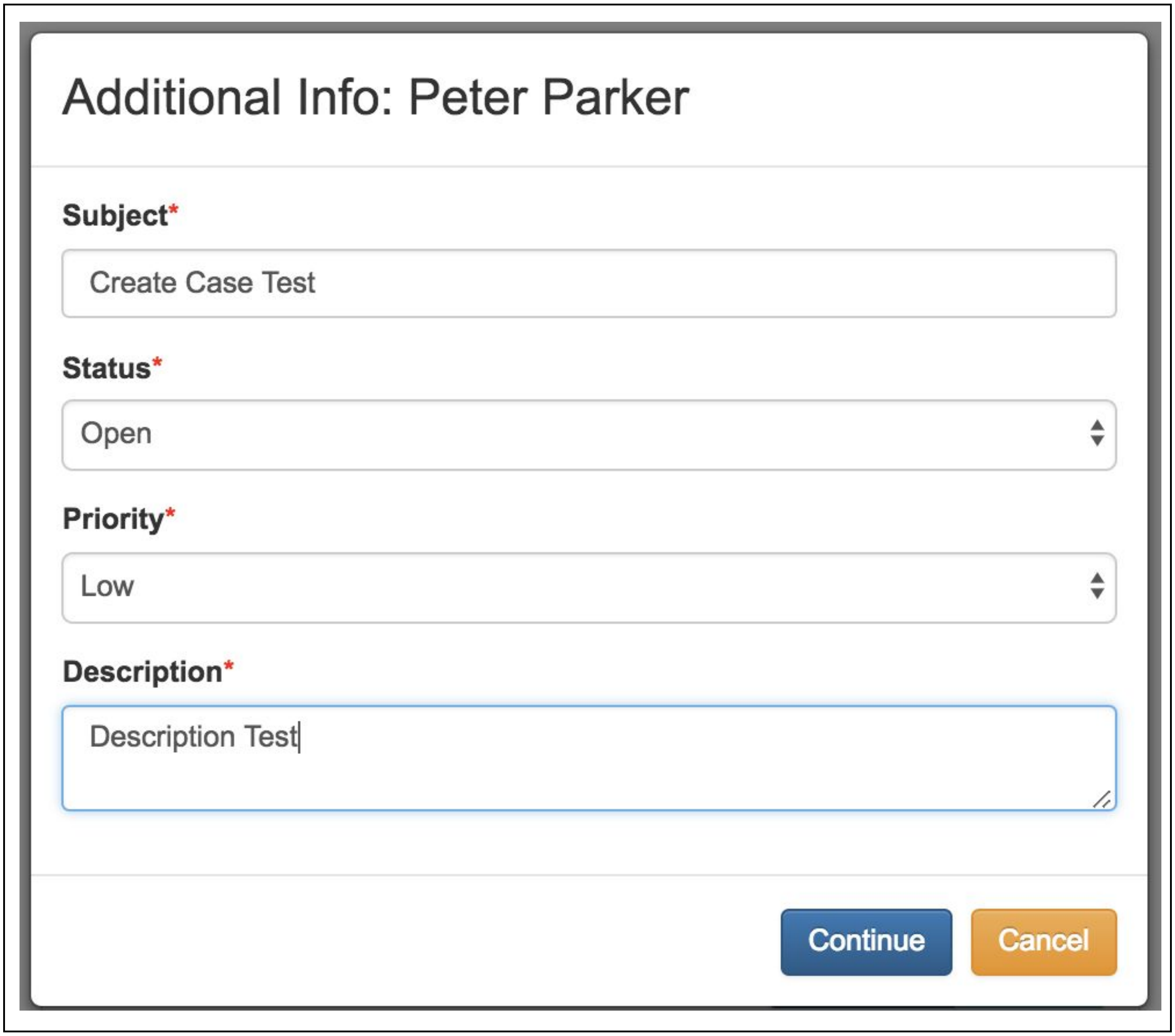


And when you click on an Account, the window with the detailed data of this record opens:



Create Case

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



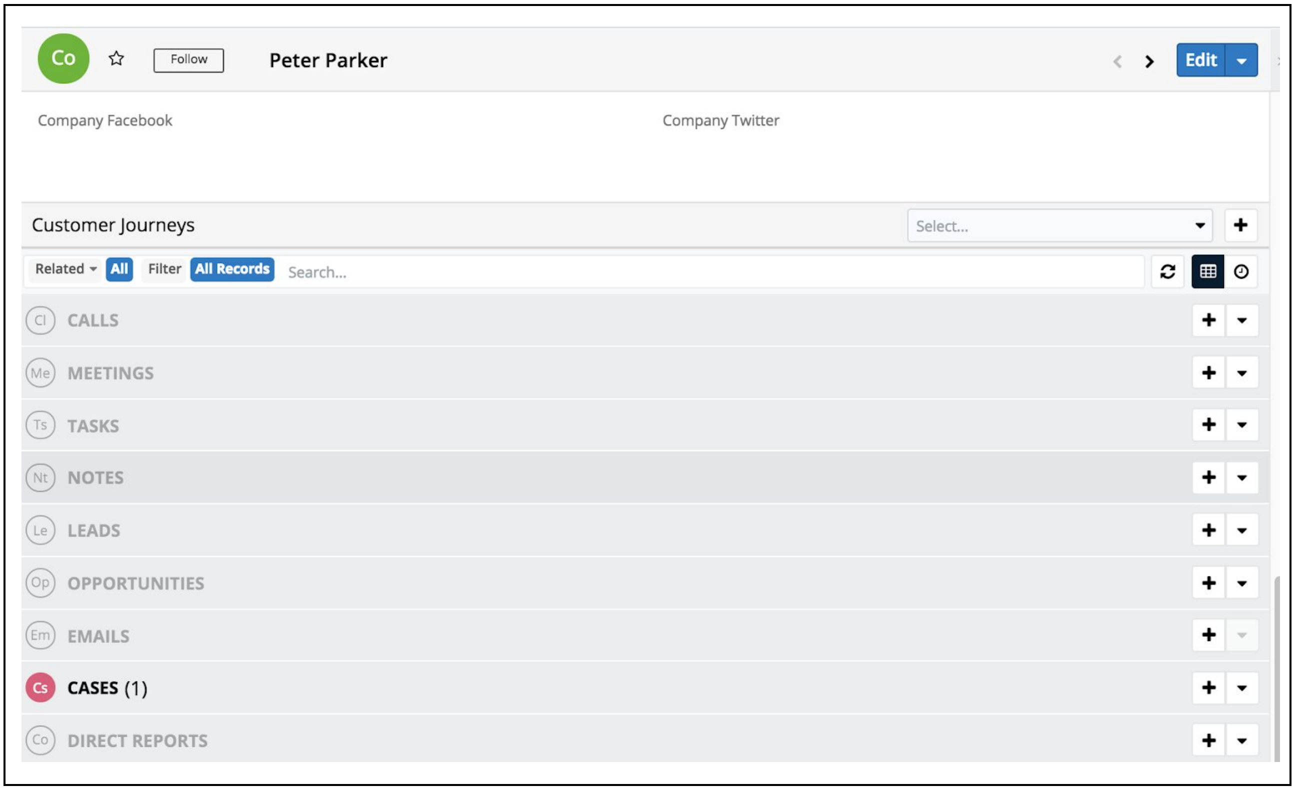
When the Case is entered successfully, this message will be displayed because when a Case is created, the chat is automatically transcripted to it:

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

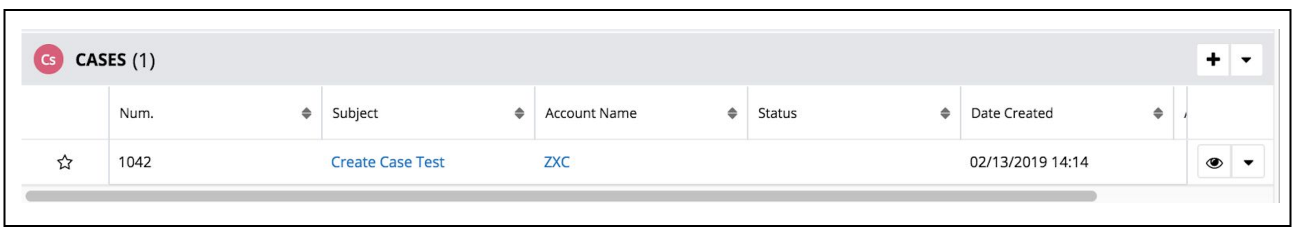
Disabled buttons appearance:

Enabled buttons appearance:

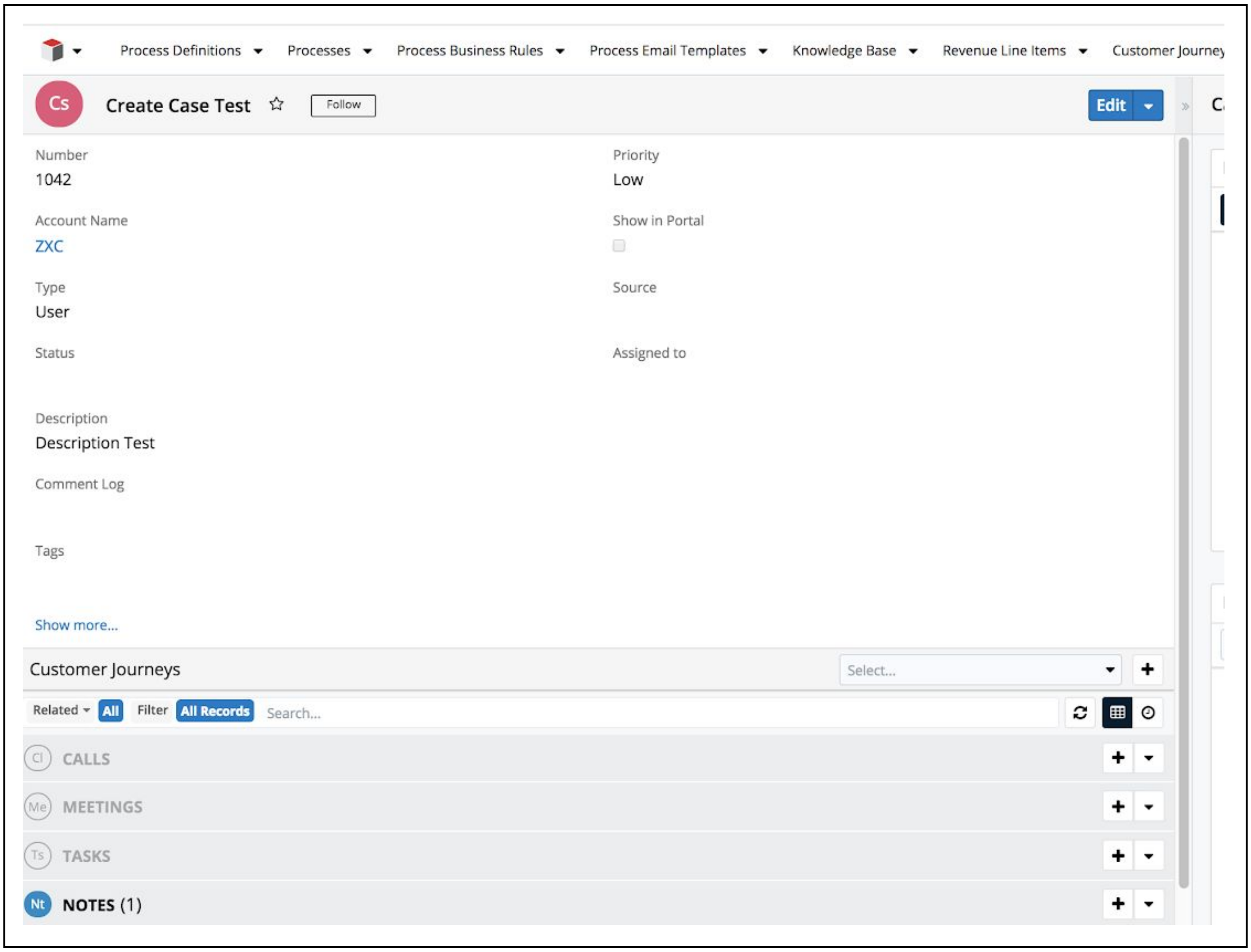
Note where this record will be stored in CRM system itself. You can access in Top Menu "Cases" or open the Contact / Lead and going to Customer Journeys session:



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:


Process Definitions
Processes
Process Business Rules
Process Email Templates
Knowledge Base
Revenue Line Items
Customer Journey
Cs
Create Case Test
Follow
Edit
Number
1042
Priority
Low
Account Name
ZXC
Show in Portal
Type
User
Source
Status
Assigned to
Description
Description Test
Comment Log
Tags
Show more...
Customer Journeys
Select...
Related
All
Filter
All Records
Search...
CALLS
MEETINGS
TASKS
NOTES (1)

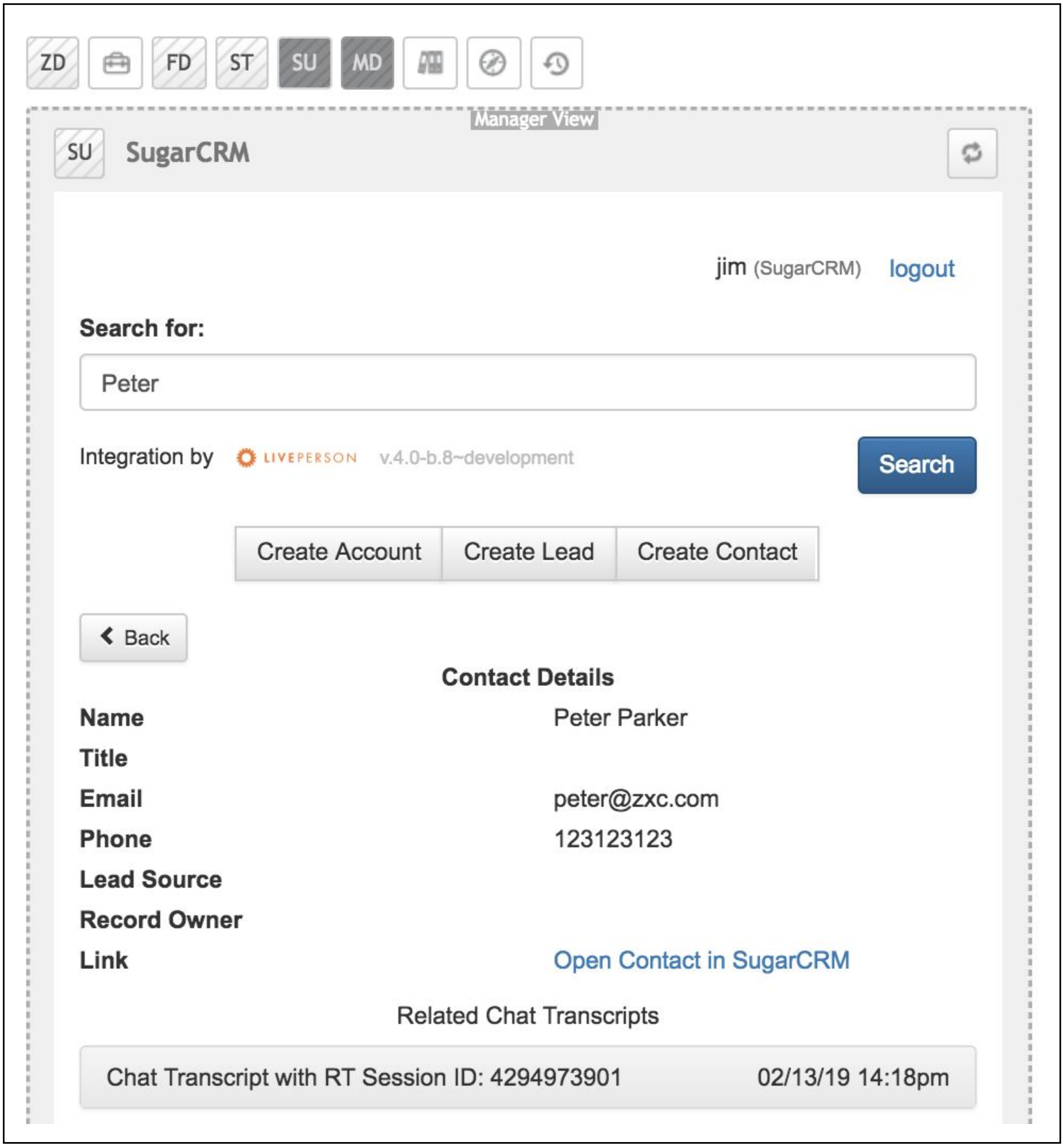
Link Chat Transcripts to Entity

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

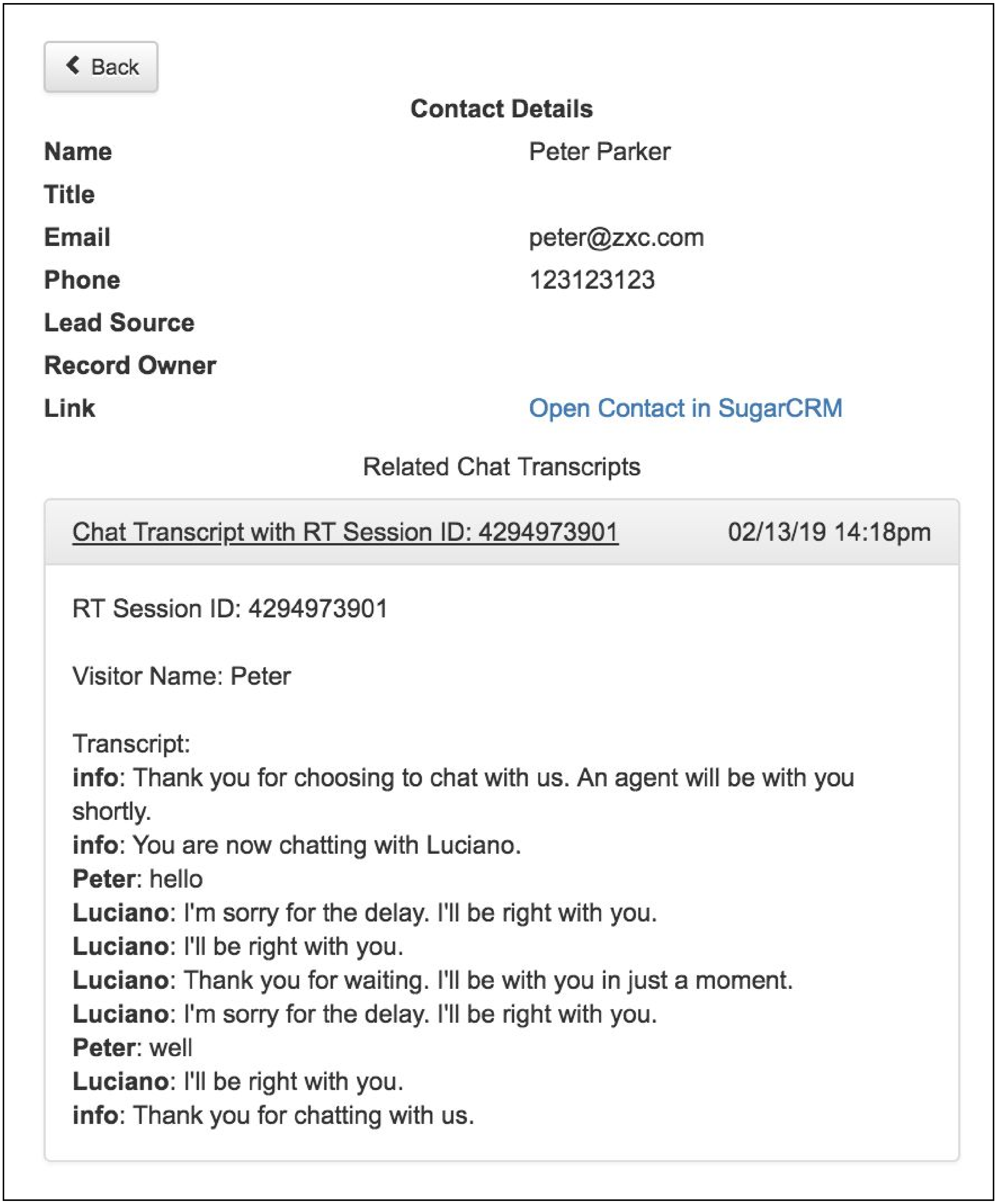
- You can attach a current chat transcript to a User or Case record by clicking on the "Link Chat" button once the session has ended.

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.

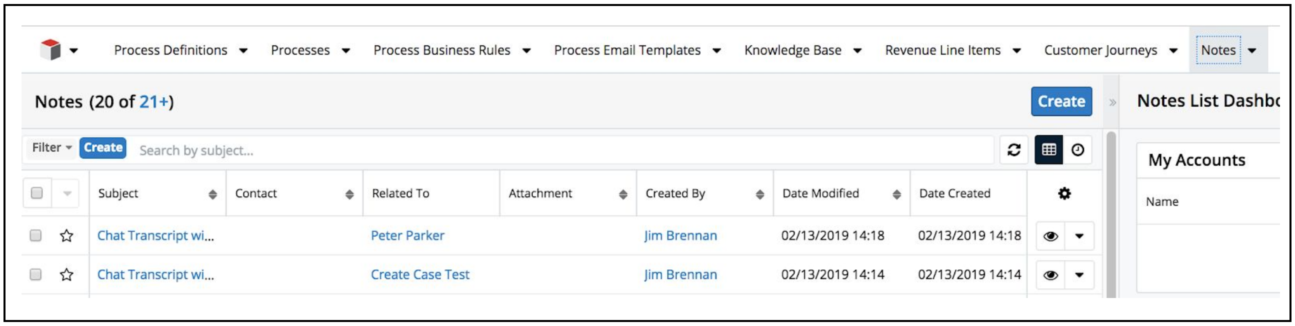


- Click on the specific transcript ID to see the full details of the chat transcripts as show in the screen below:

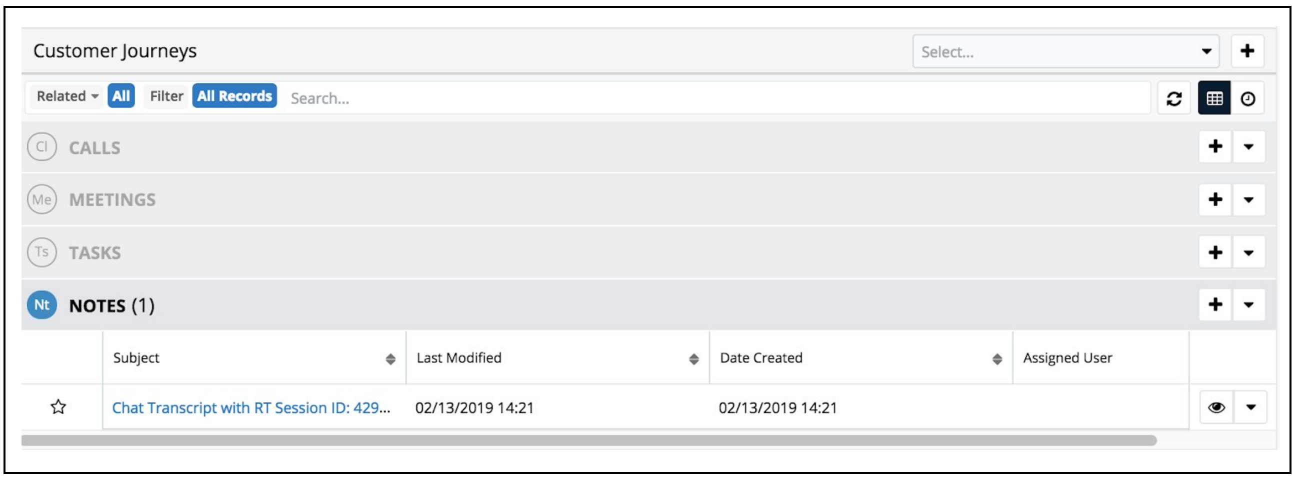

Back
Contact Details
Name
Peter Parker
Title
Email
peter@zxc.com
Phone
123123123
Lead Source
Record Owner
Link
Open Contact in SugarCRM
Related Chat Transcripts
Chat Transcript with RT Session ID: 4294973901
02/13/19 14:18pm
RT Session ID: 4294973901
Visitor Name: Peter
Transcript:
info: Thank you for 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.

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

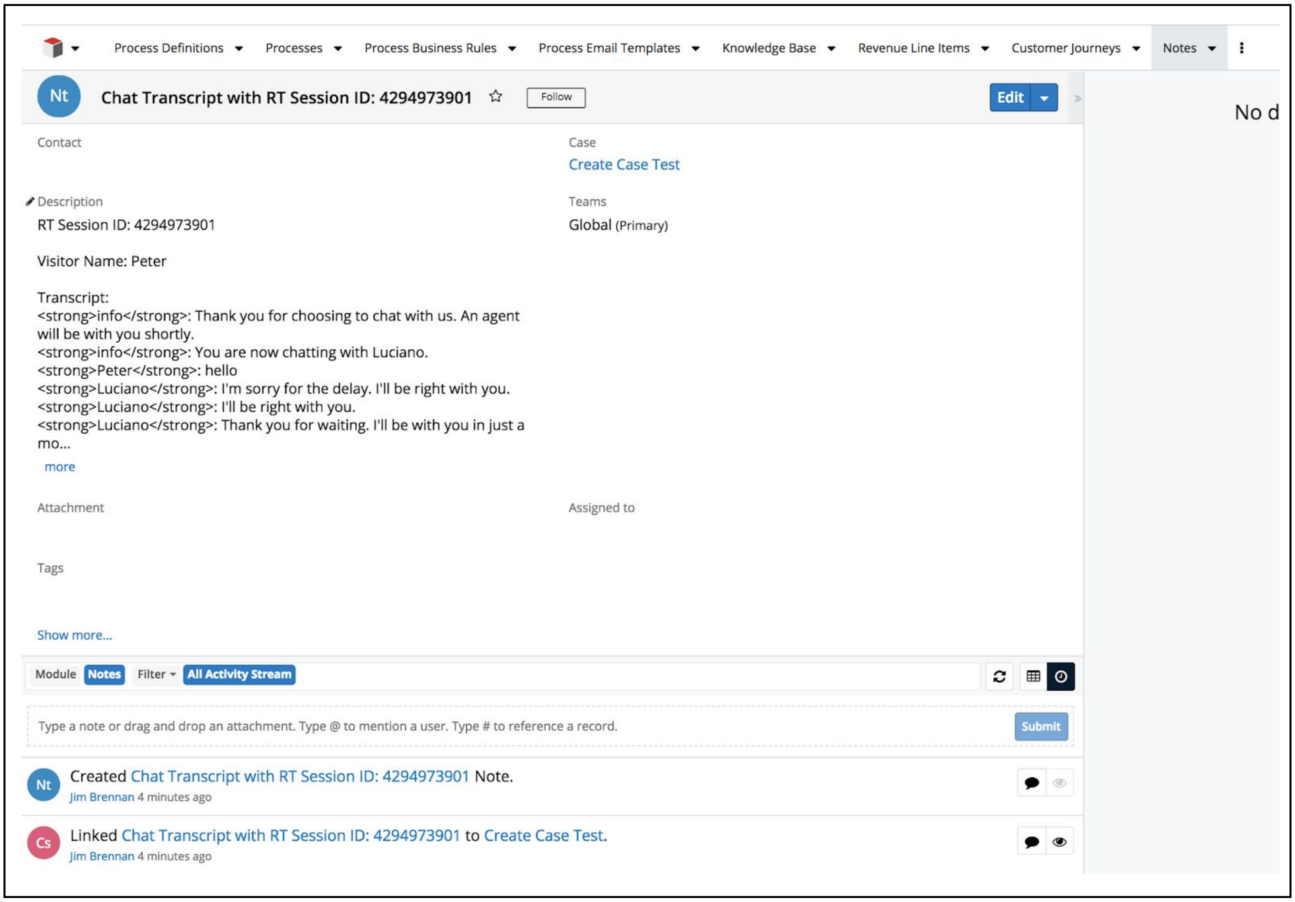
To see all Notes (linked chats), click on "Notes" in top menu:



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



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



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.