ZENDESK 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
6/15/2017	1.1	Vinod	Update Features
9/19/2017	1.2	Manan Mehta	Update Features and description
11/12/2018	1.3	Luciano Buhler	Update links and references
03/20/2019	1.4	Luciano Buhler	Documentation updated according to new standardized template
03/27/2019	1.5	Luciano Buhler	Updated the sequence of the Document.

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 Zendesk Widget. The LiveEngage Zendesk Widget will allow viewing Zendesk information, the creation of tickets, and attaching chat transcripts to the tickets, inside LiveEngage platform.

If you are currently subscribed to other or different CRM, please contact your Account Manager to obtain the correct User Guide.

Supported LE Channels

Chat or Messaging

Set Up Guide

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

Overview

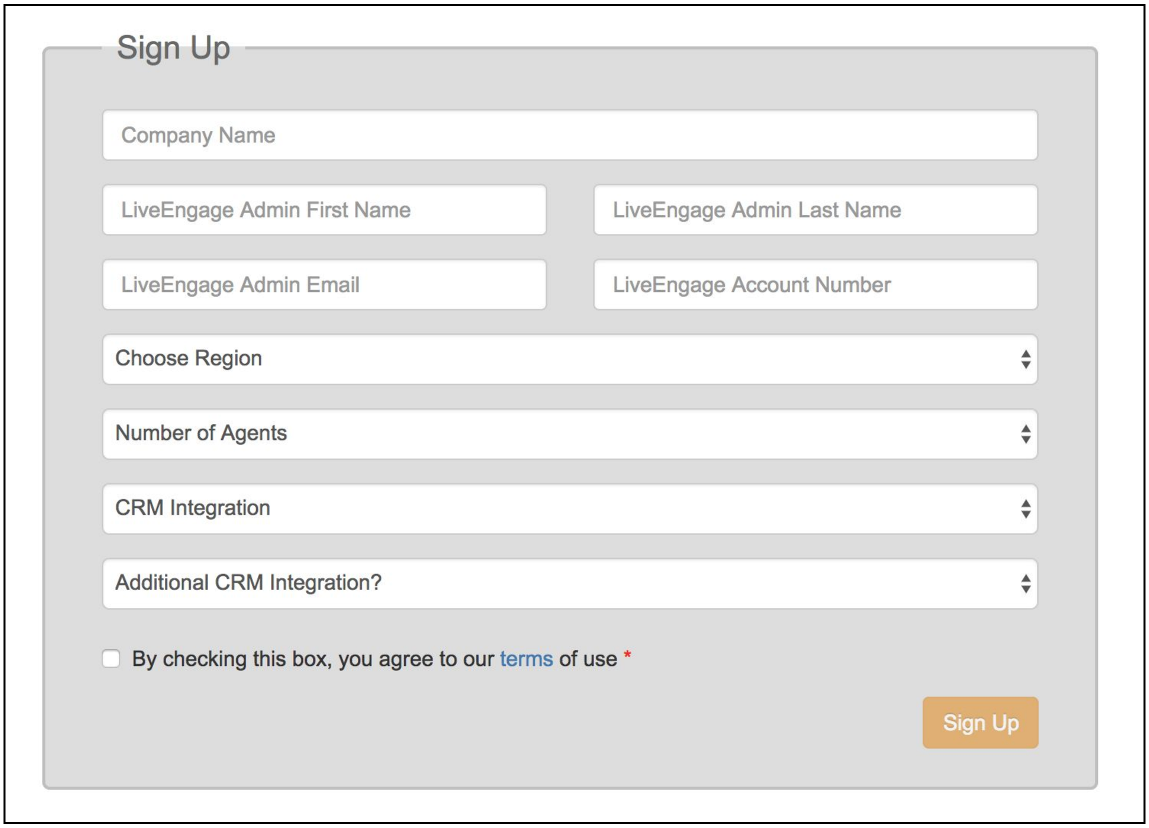
Below is an overview of the required widget settings:

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

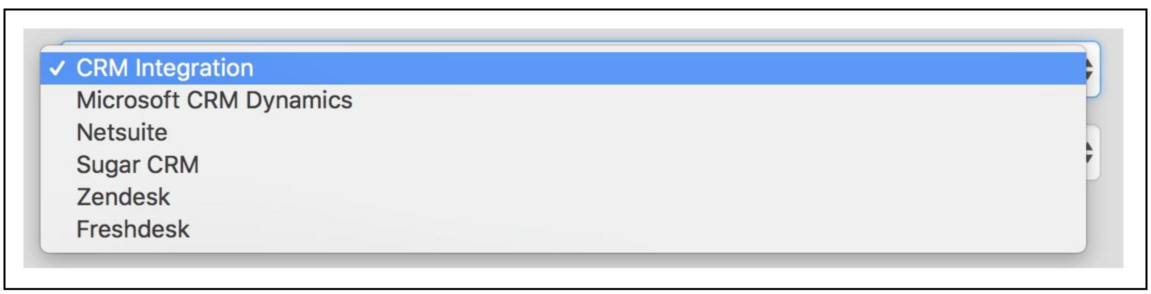
Widget Sign Up

It is easy to sign up to CRM Widget, visit the installation URL, fill out the form and click "Sign UP" button or access directly the link https://lpcrm.fs.liveperson.com/signup. Once approved, you will receive account credentials to login to the admin panel and complete the connection configurations with the Zendesk.

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

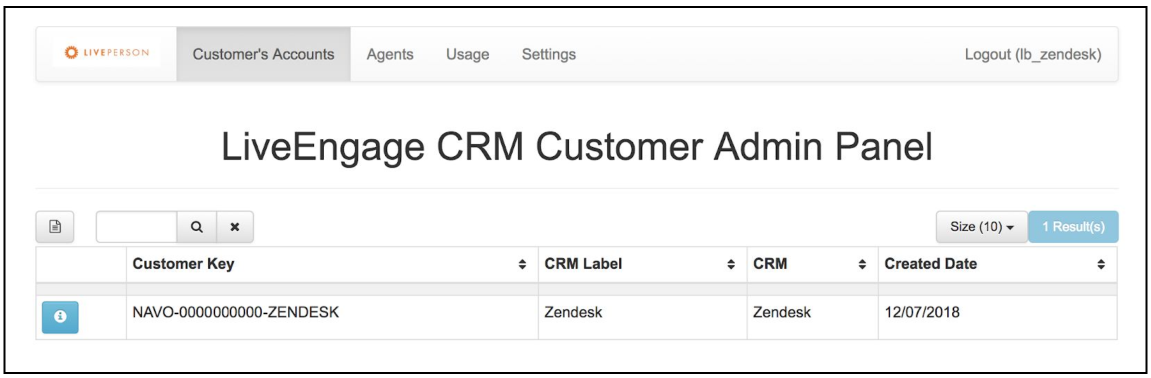
1. Make sure you receive the username and password from your Account Manager.
2. Go to the installation URL: https://lpcrm.fs.liveperson.com/admin-panel

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

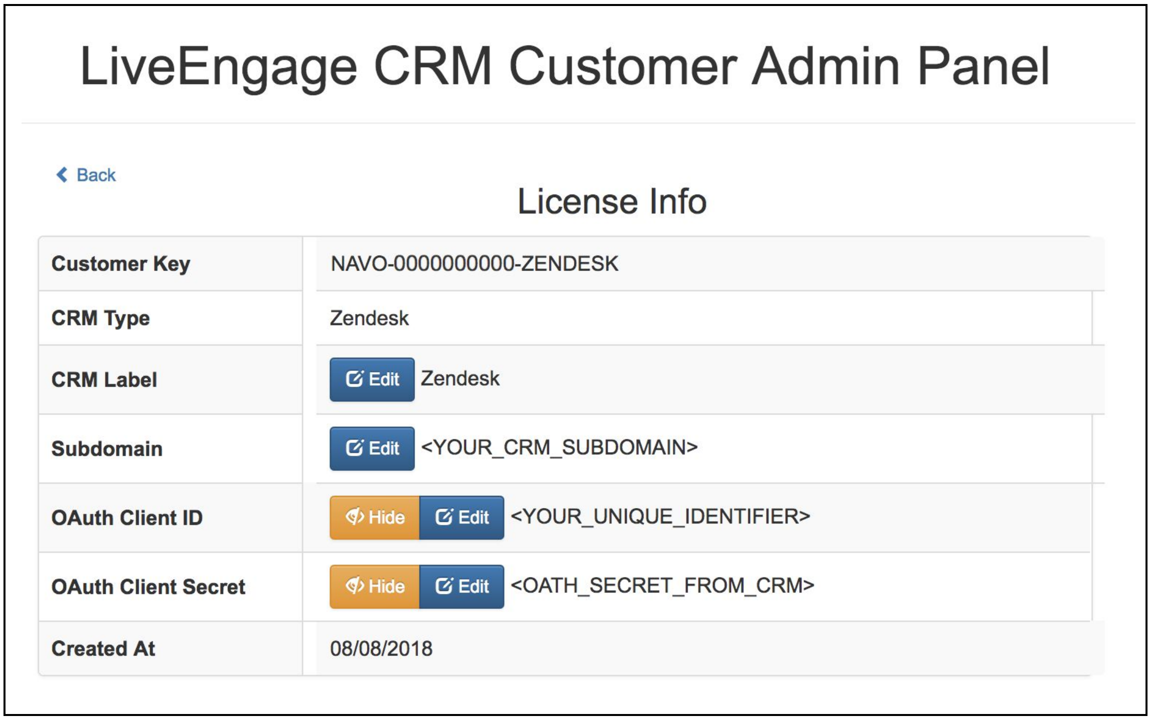


c. Click on the "info" icon next to the details of the customer key to modify connection to your CRM instance. Will be opened the License Info window.

License Info

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

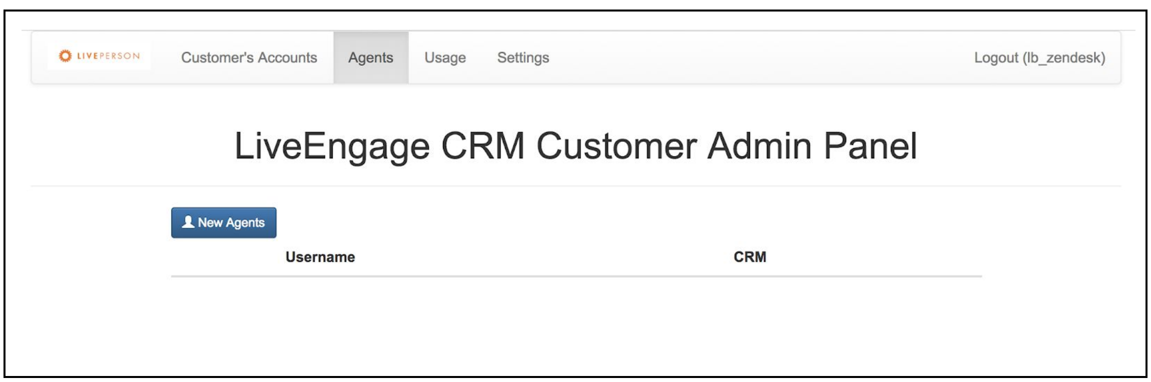
Here must be configures the connection to your CRM account. This is detailed in next section [Customer Accounts](#).



Agents (Deprecated)

Link: Admin Panel → Agents

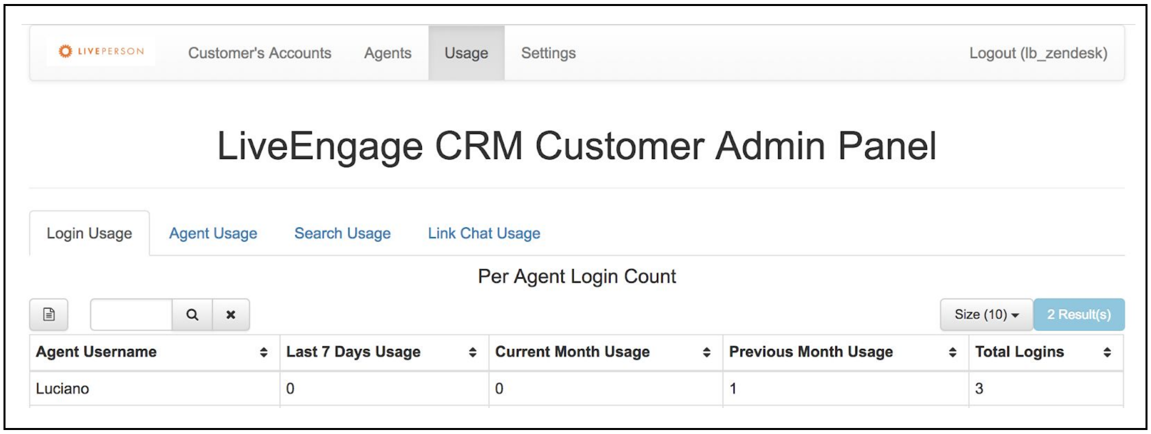
This session will not be addressed as it is deprecated



Usage

Link: Admin Panel → Usage

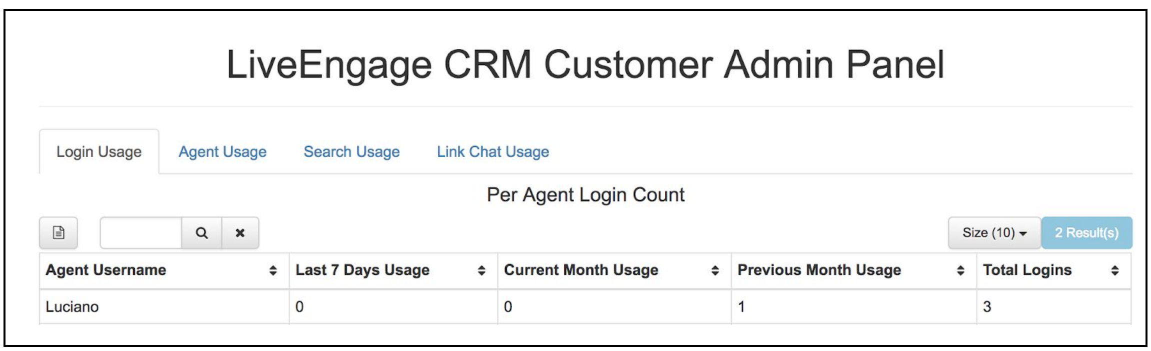
See the follow usage statistics from the account:



Login Usage

See the login statistics from each Agent by:

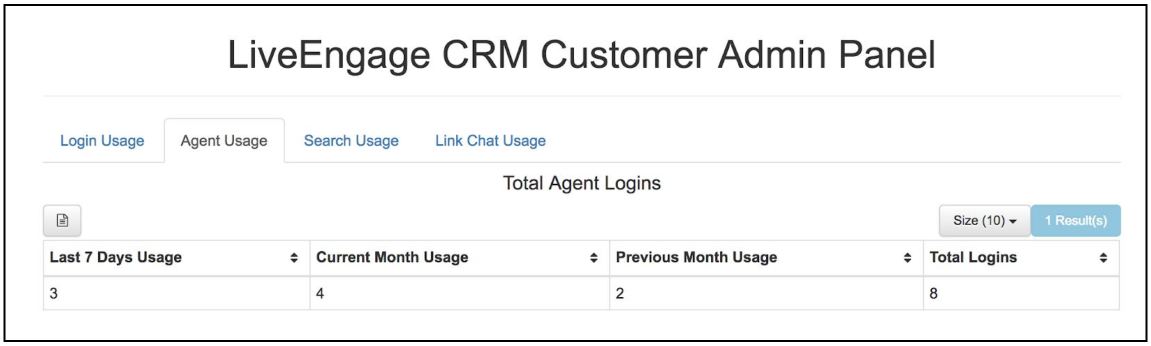
- Last 7 Days
- Currently Month
- Previous Month
- Total Logins



Agent Usage

See the login statistics from all Agents by:

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

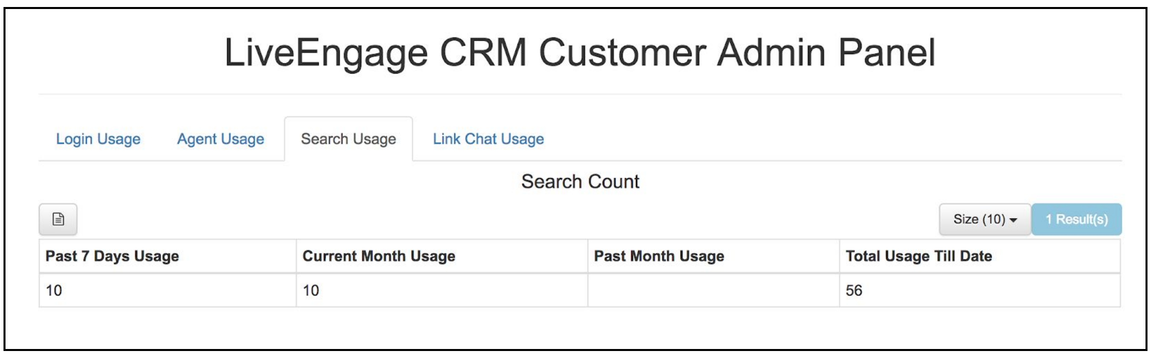


Last 7 Days Usage	Current Month Usage	Previous Month Usage	Total Logins
3	4	2	8

Search Usage:

See the search statistics from all Agents by:

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

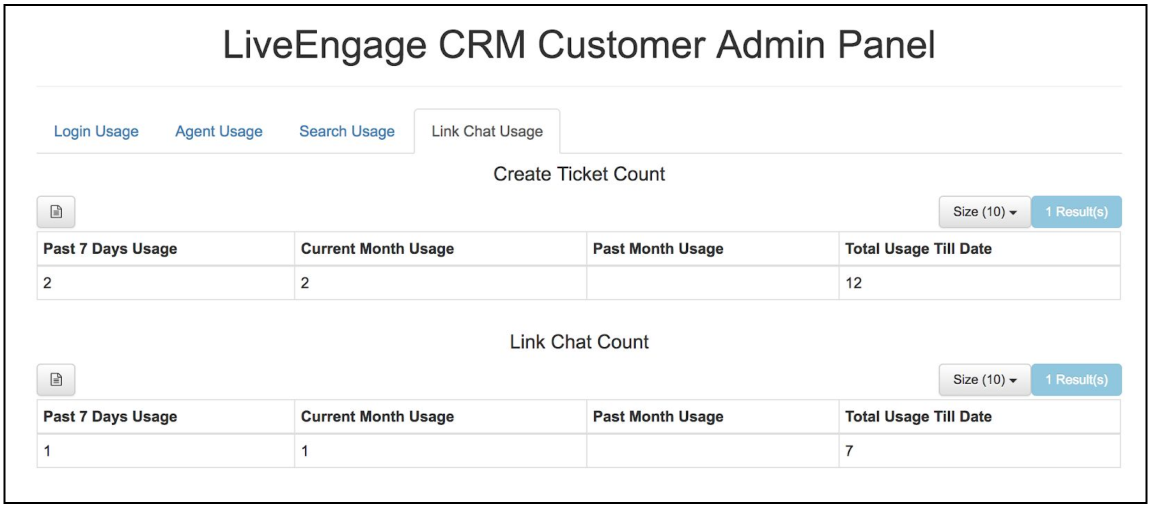


Past 7 Days Usage	Current Month Usage	Past Month Usage	Total Usage Till Date
10	10		56

Link Chat Usage:

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

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



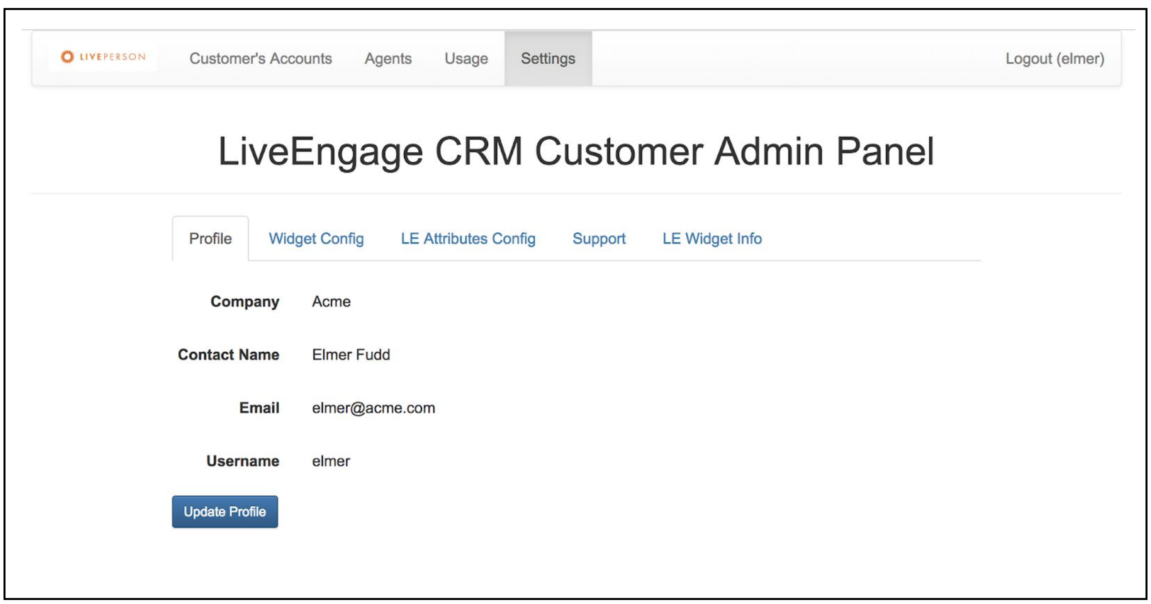
Past 7 Days Usage	Current Month Usage	Past Month Usage	Total Usage Till Date
2	2		12

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

Settings

Link: Admin Panel → Settings

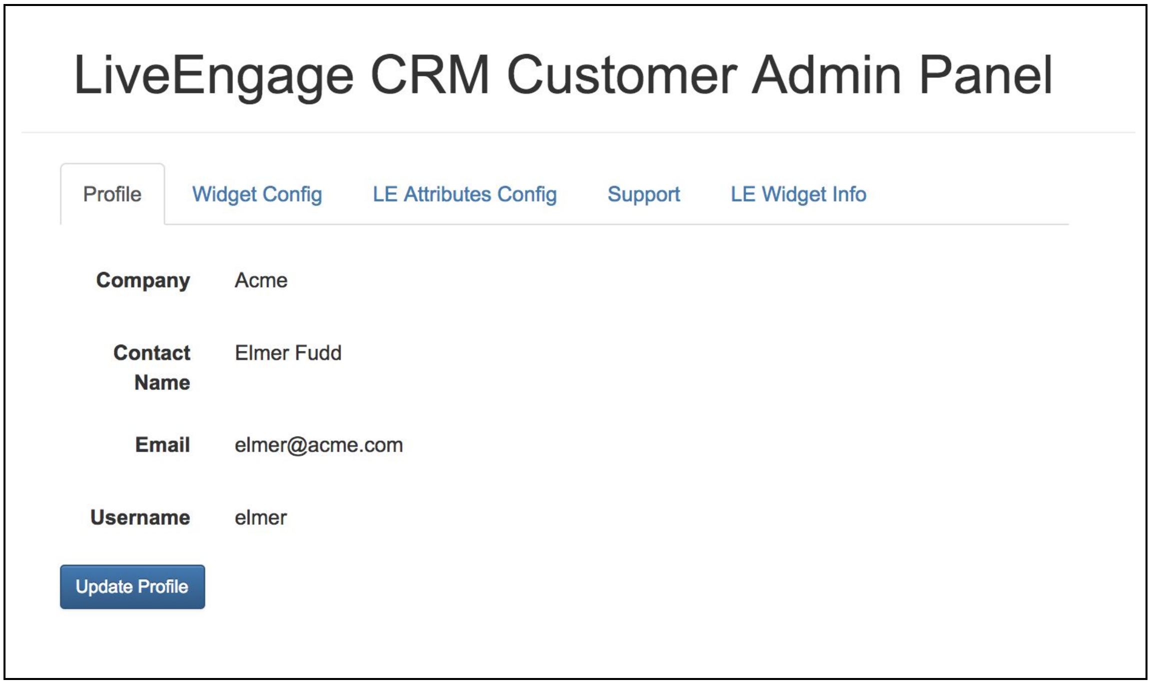
Here you can check and update your profile information.



Profile

Link: Admin Panel → Settings → Profile

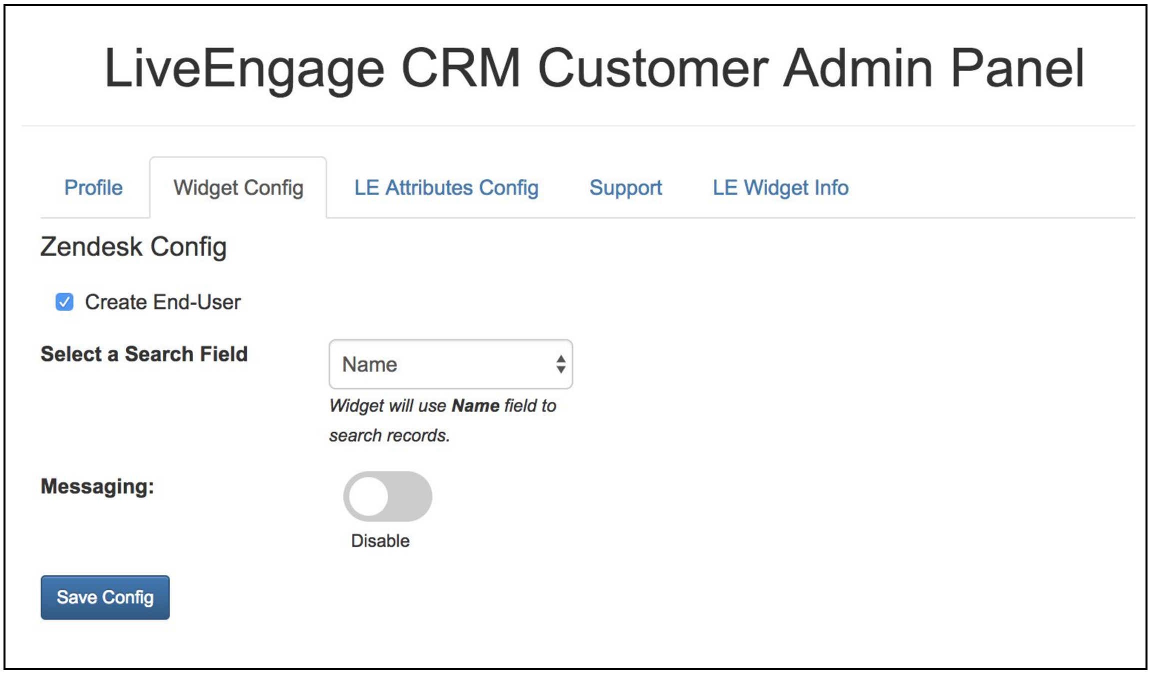
Here can verified your company profile information.
To update/change company profile information: Company Name, Contact Name, Email, Username, and Password.



Widget Config

Link: Admin Panel → Settings → Widget Config

This is detailed in the section Widget Config.



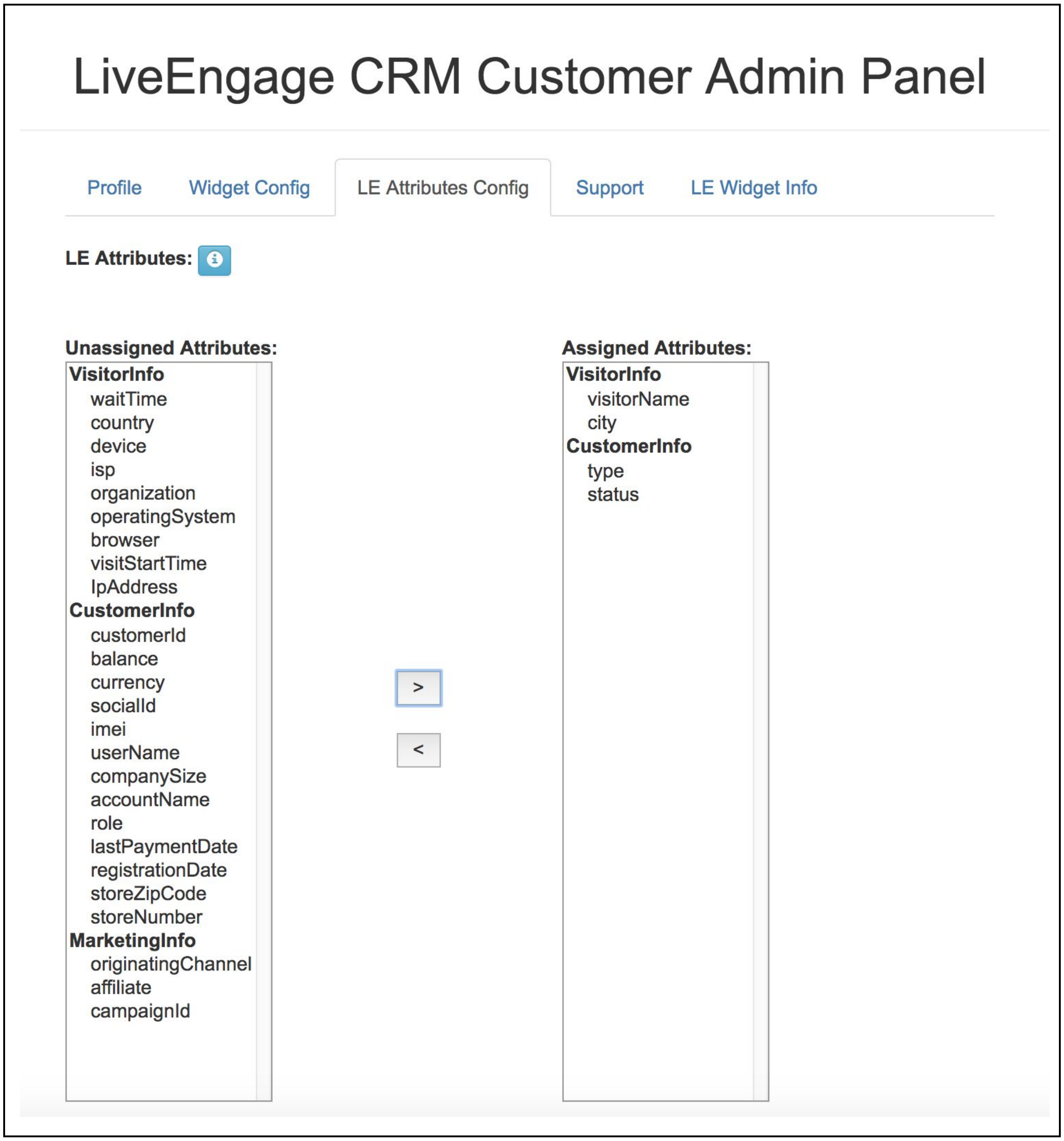
LE Attributes Config

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 < .

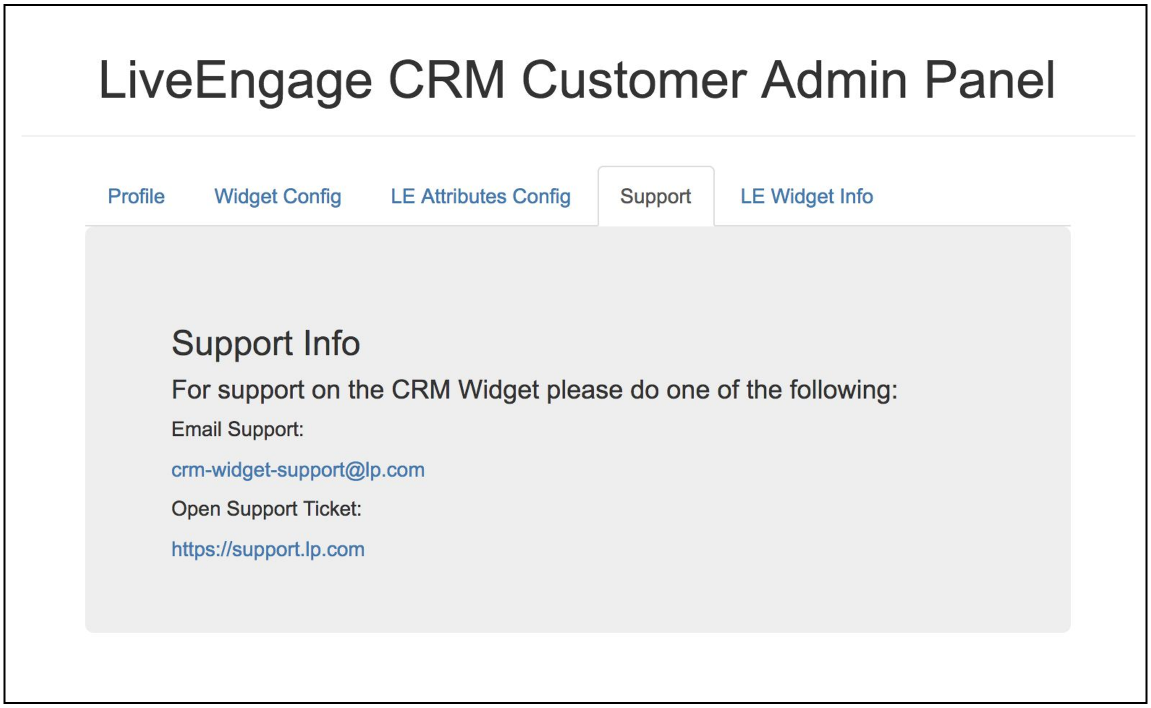
Note! For default, no one attribute is captured by Widget.



Support

Link: Admin Panel → Settings → Support

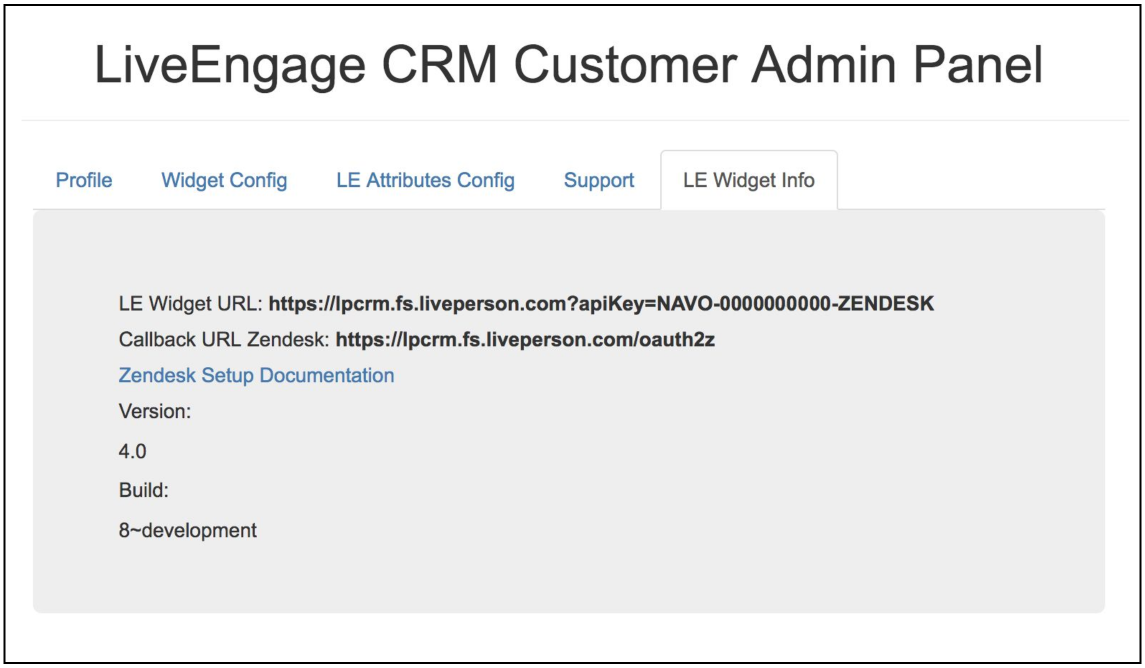
See support email and process to open a ticket for support.



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.

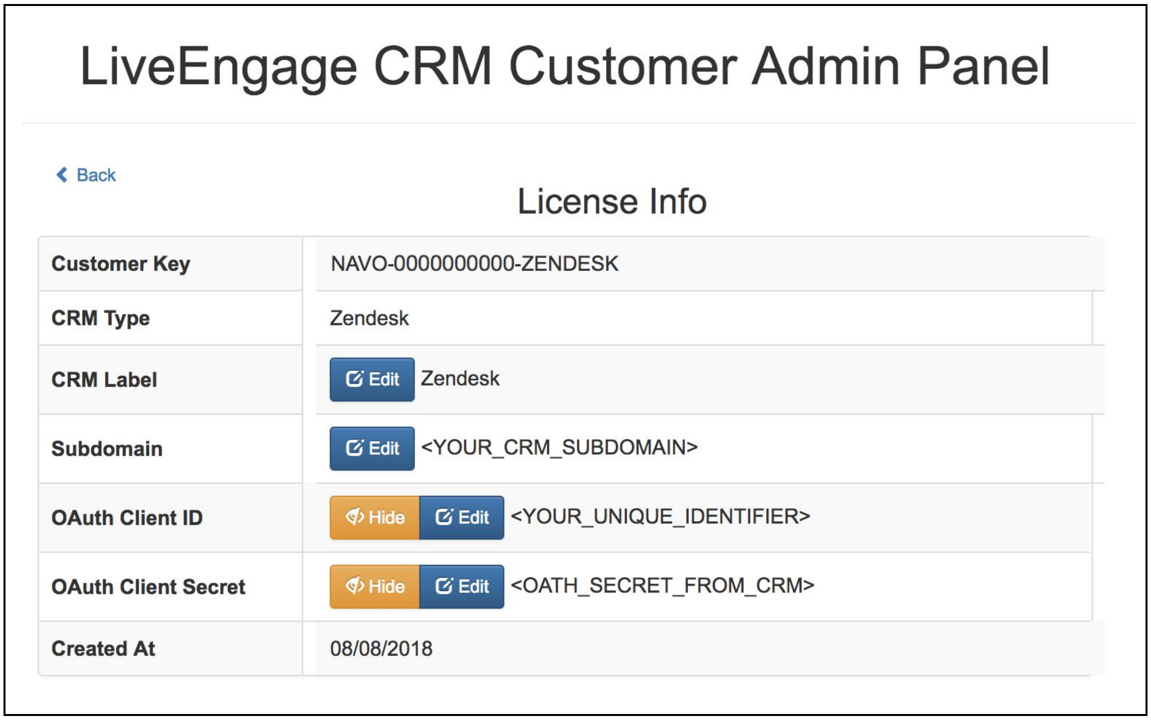


Customer Accounts

Link: Admin Panel → Customer's Accounts

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

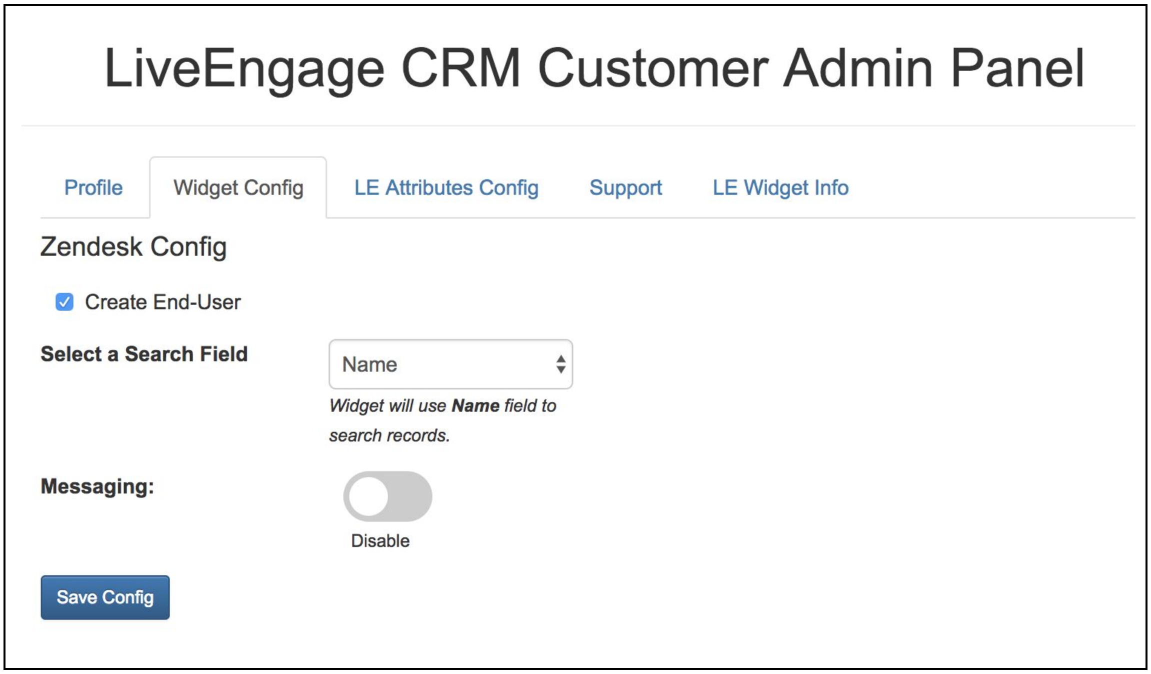
- Customer Key: This value is used to identify the license in the Live Engage.
- CRM Type: Which CRM is registered to this license.
- CRM label: Name to identify the current license.
- Subdomain: The main link part of CRM address. (https://<subdomain>.zendesk.com)
- OAuth Client ID: Unique Identifier value from Zendesk Oauth Client (Section "Configure CRM" subsection "5" point "b")
- OAuth Client Secret: Secret value from Zendesk Oauth Client (Section "Configure CRM" subsection "5" point "c")



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 Zendesk:
  - Create End-User

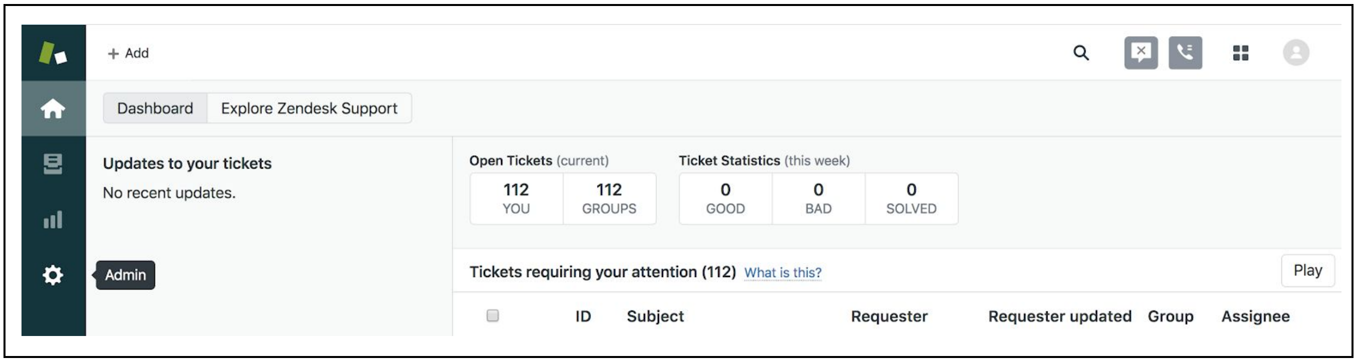
- Select a Search Field:
  - Name
  - Email
  - Phone

- Enabling/disabling Messaging

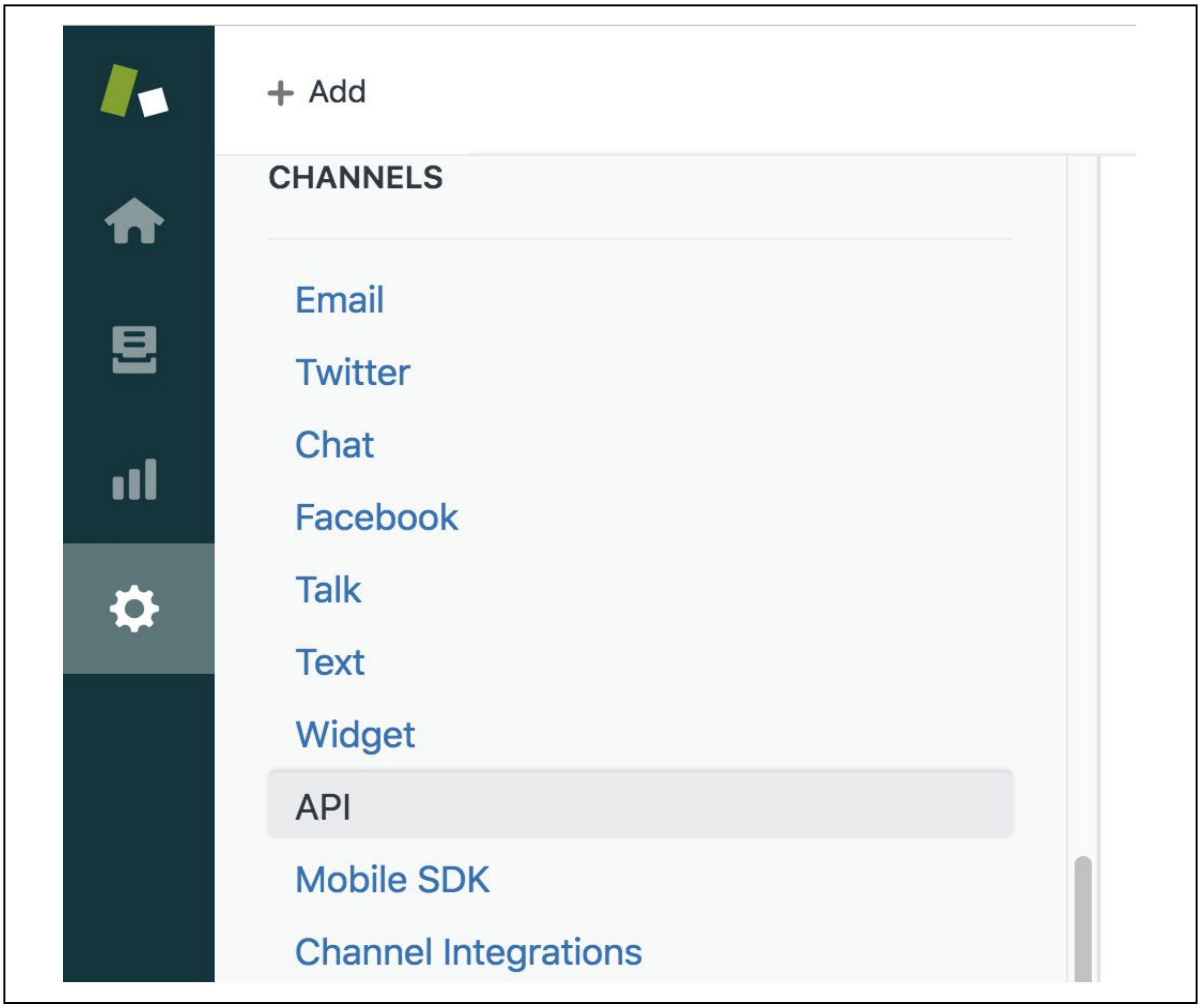
Configure CRM

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

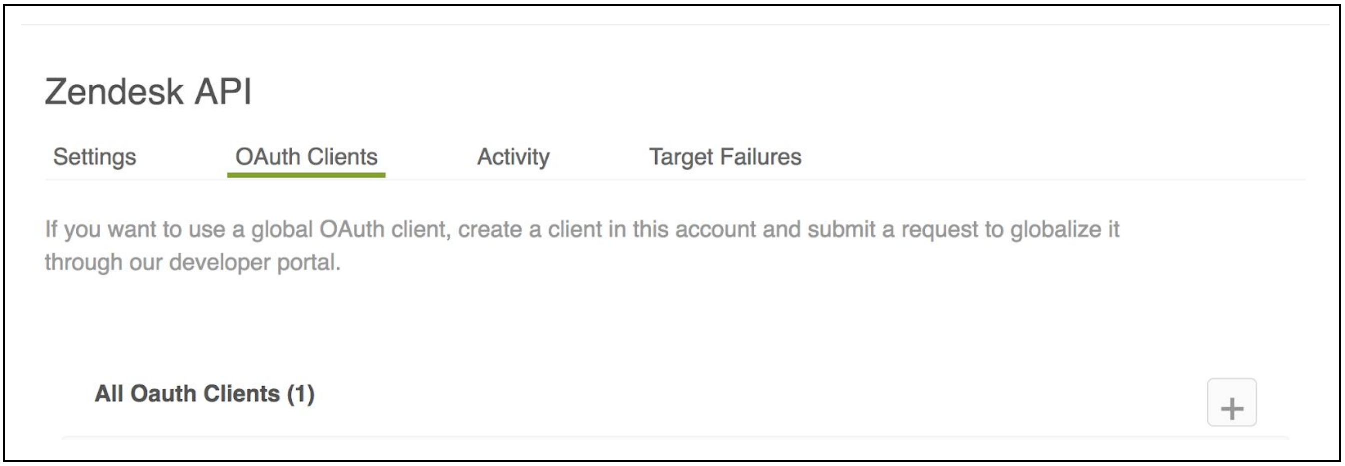
1. Login into your Zendesk in another browser tab.
2. Click on "Admin" icon on left menu:



3. Click on “API”:

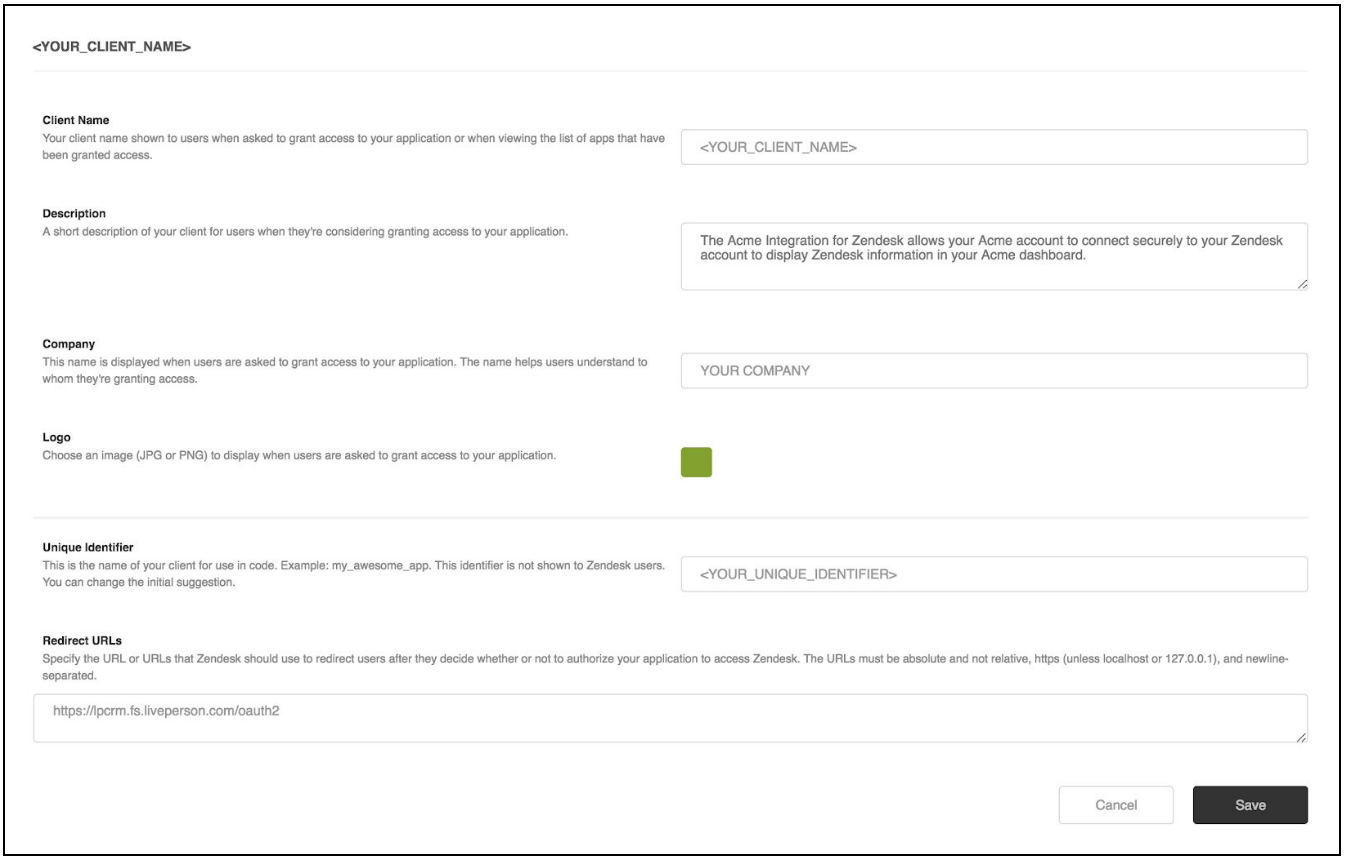


4. Click on “OAuth Client” tab on the menu and click on  to create a new OAuth Client:

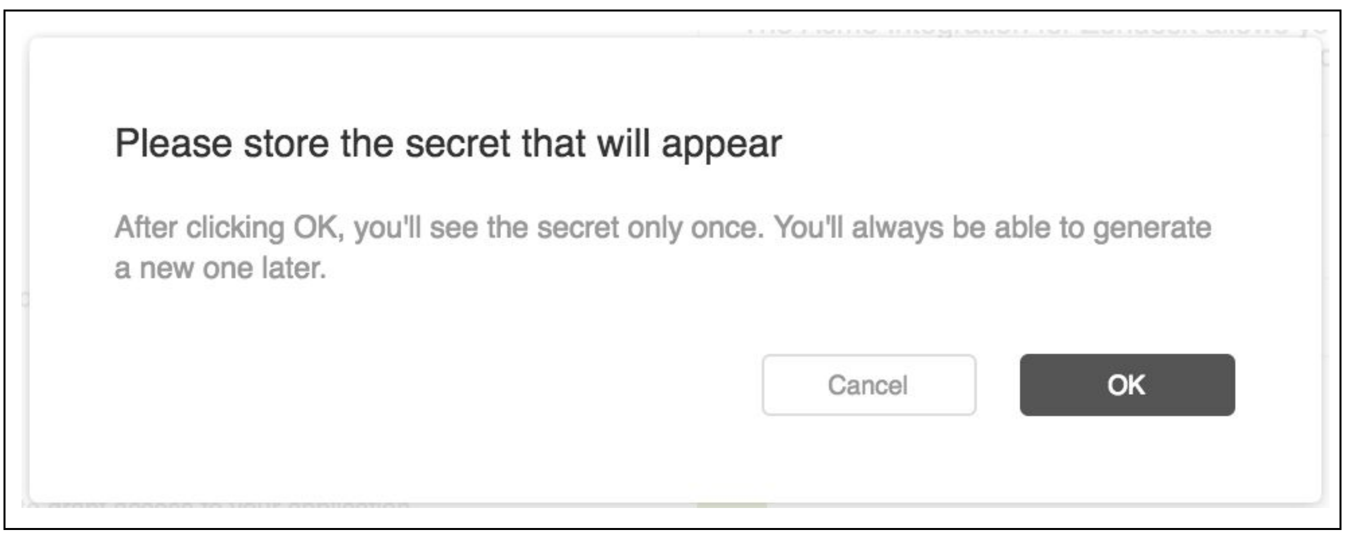


5. Complete the OAuth form and click “Save”. You will need the following information:
    a. Client Name = <YOUR_CLIENT_NAME>
        i. Example: [Navomi_LP_CRM_Widget]
    b. Unique Identifier = <YOUR_UNIQUE_IDENTIFIER>
        i. Example: [Navomi_LP_CRM_Widget]
    c. Redirect URL = https://lpcrm.fs.liveperson.com/oauth2
        i. Copy and paste this value.

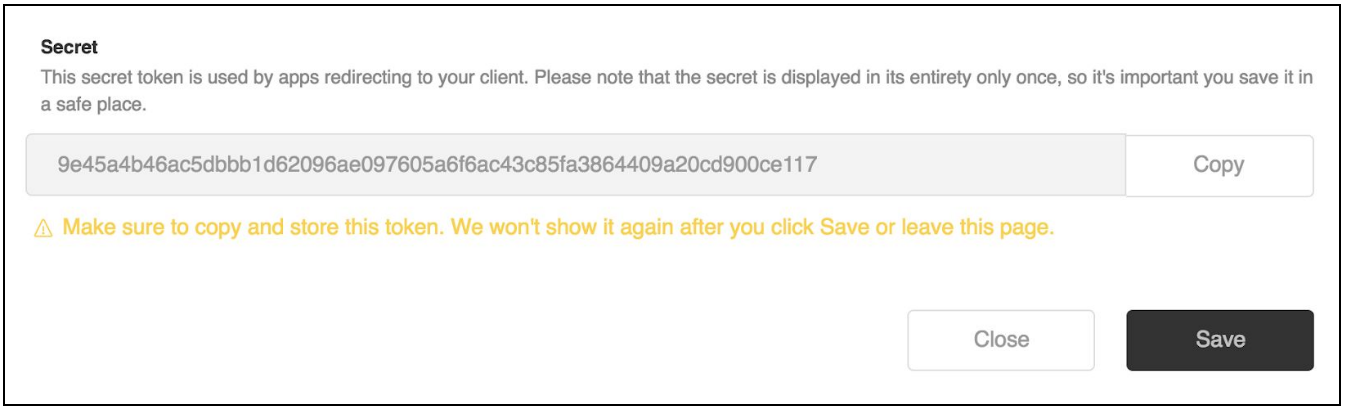
You will use above information in Admin Panel.



6. When you click "Save", a advice window will open. Click "OK":



7. Then will be showed the "Secret"to this key in the bottom of page. Make sure that copy this value clicking on "Copy" and click on "Save".

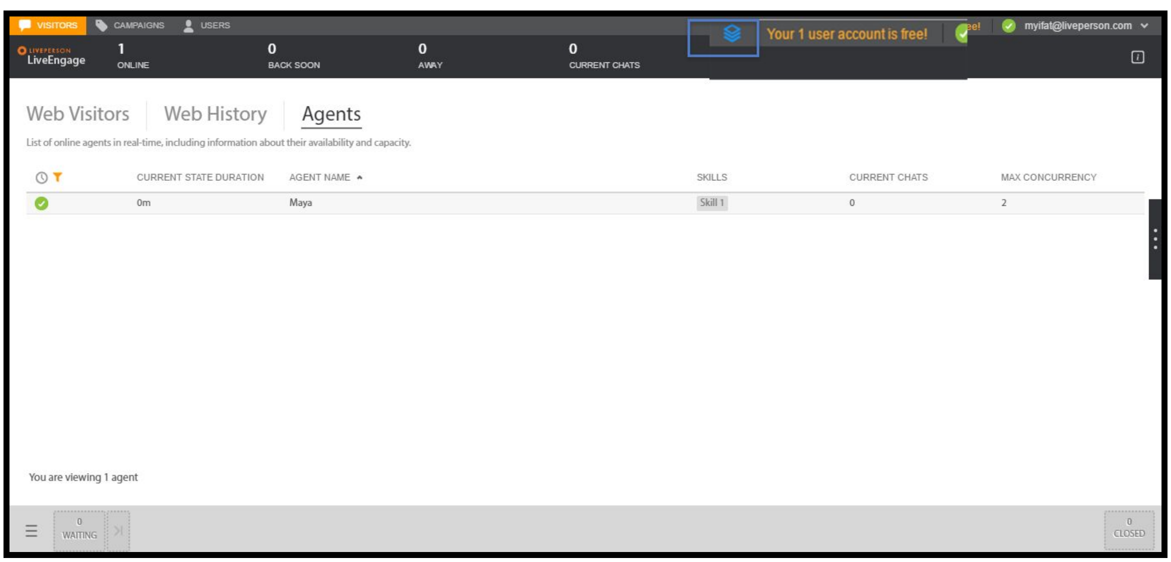


Adding Widget in LiveEngage Console

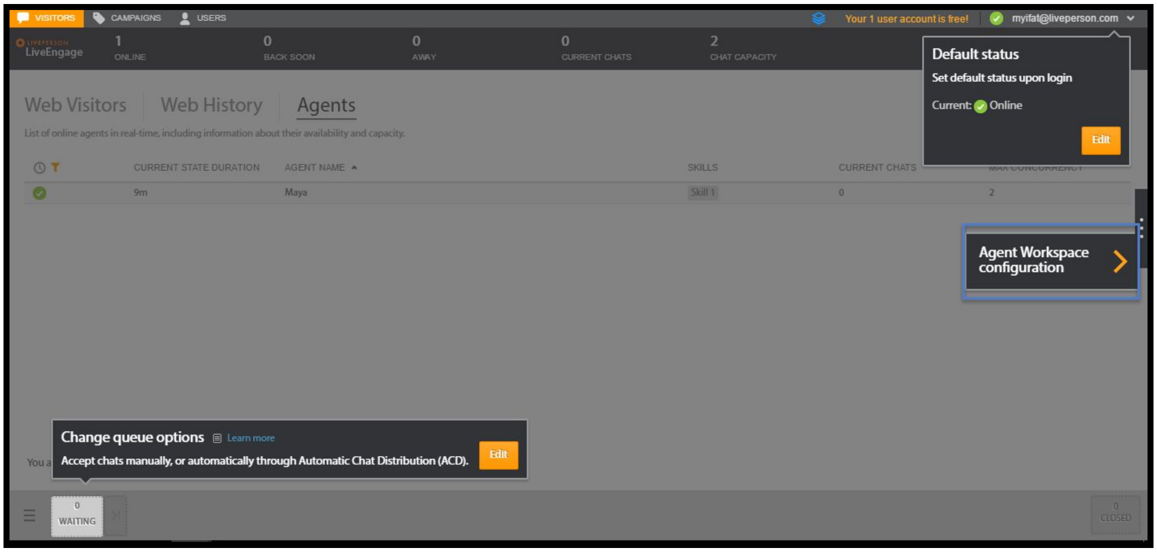
Now that you've updated the CRM Widget profile and license information, it is time to go to LiveEngage and configure the widget.

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

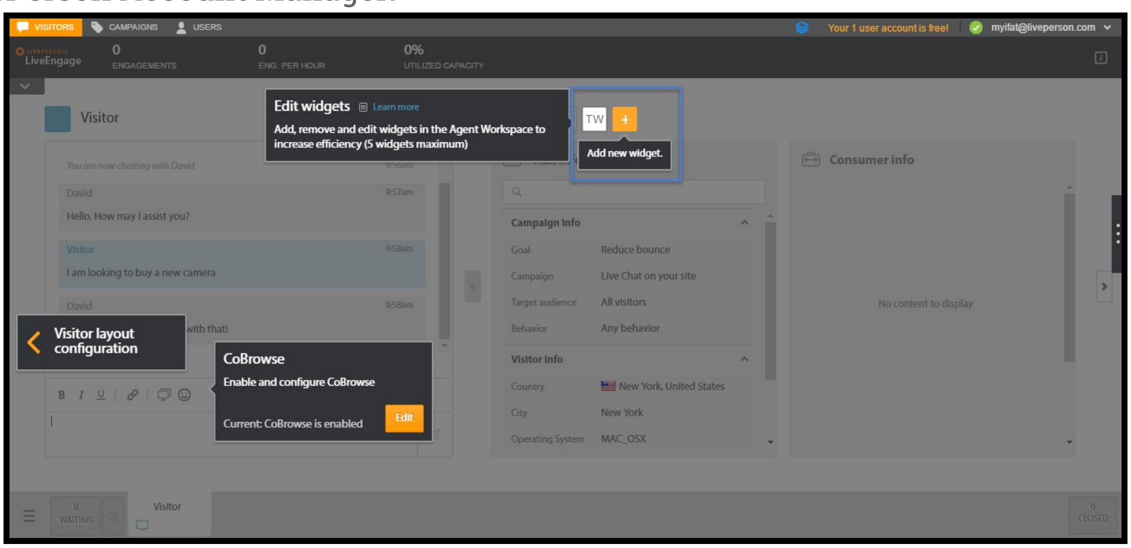
1. Access “Night Vision” settings menu: click on the icon on the top right of your screen as shown in the screenshot below:



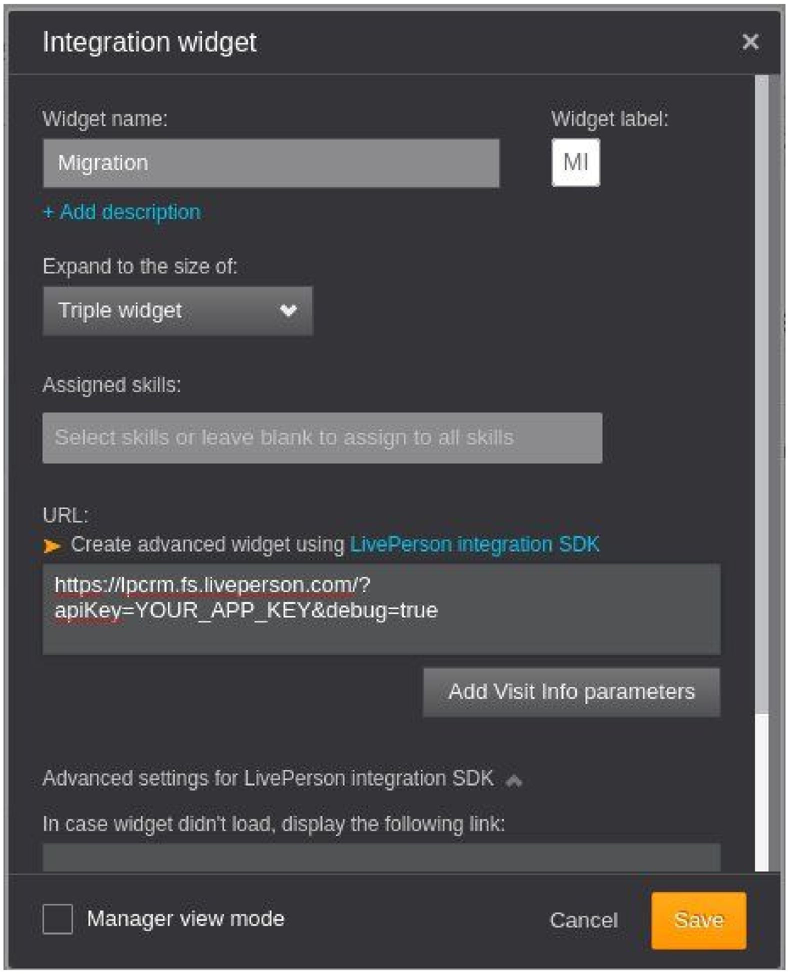
2. Once in Night Vision, click on “Agent Workspace Configuration”



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 “Zendesk” to have “ZE” 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 ZENDESK.

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

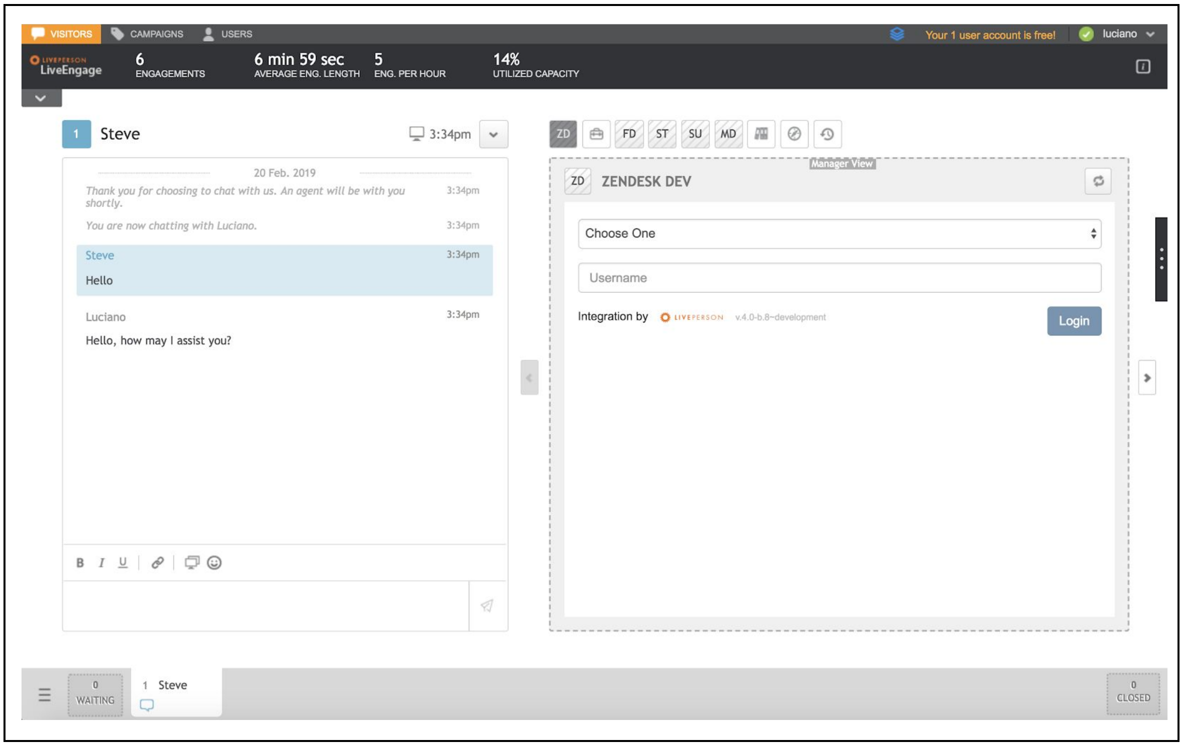
Overview

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

- Starting Zendesk Widget
- Login Widget
- Custom Functionalities
- Search Records
- Search Records Filter / Fields
- View Records
- View Transcript Associated with Records
- Create New Records
    - Create End User
    - Create Ticket
- Linking a Chat Transcript to Entity
- Unlink Chat Transcripts

Starting Zendesk Widget

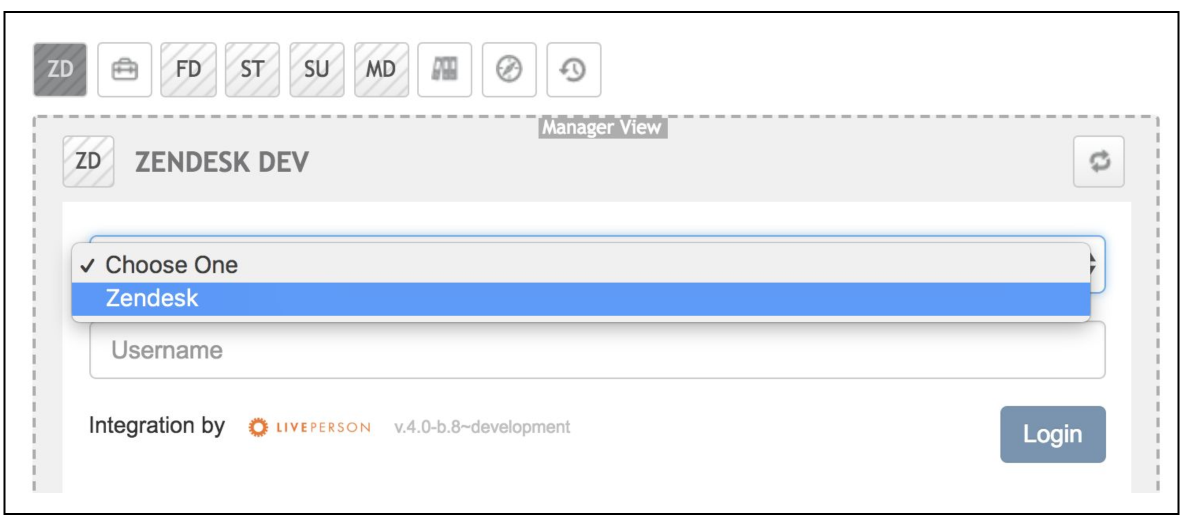
To start working on the new widget, accept a chat, click on "Zendesk" widget, login and you can view and create accounts and tickets directly in LiveEngage.



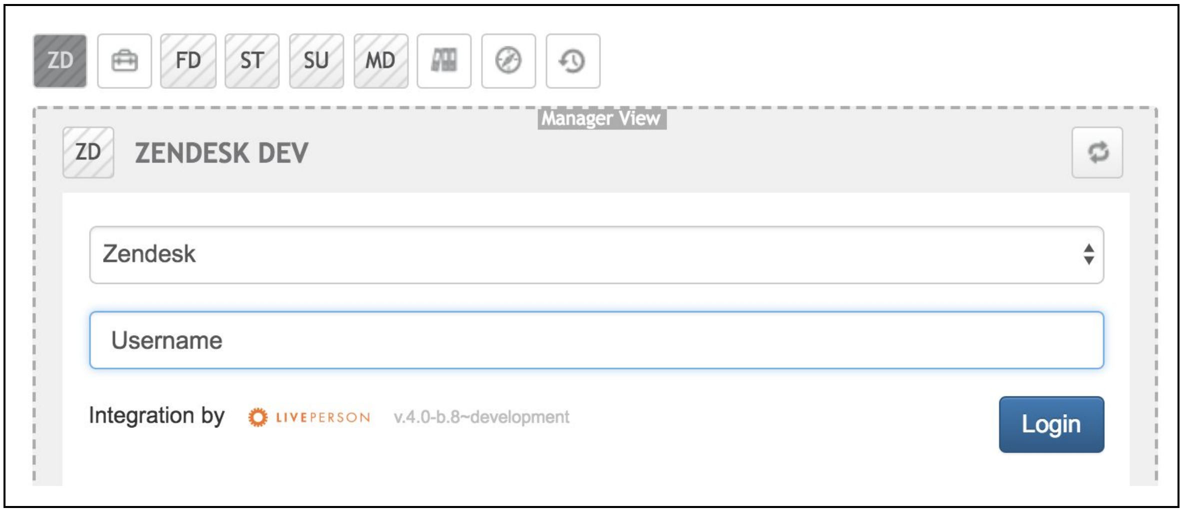
Login Widget

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

Select registered CRM:

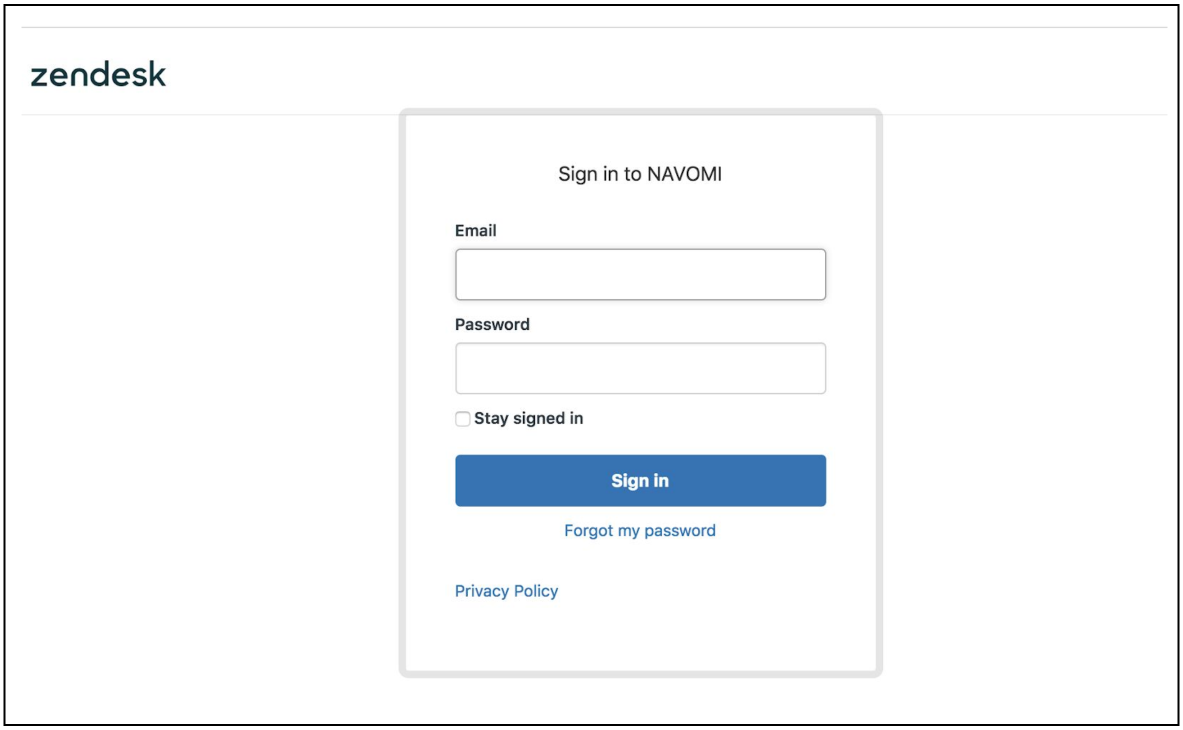


Enter your credentials (Username and Password) and click on "Login" button:



Click on "Authorize me"button:

A new window will open for the CRM login. Be sure to enter valid credentials in the requested fields and click in Sign in



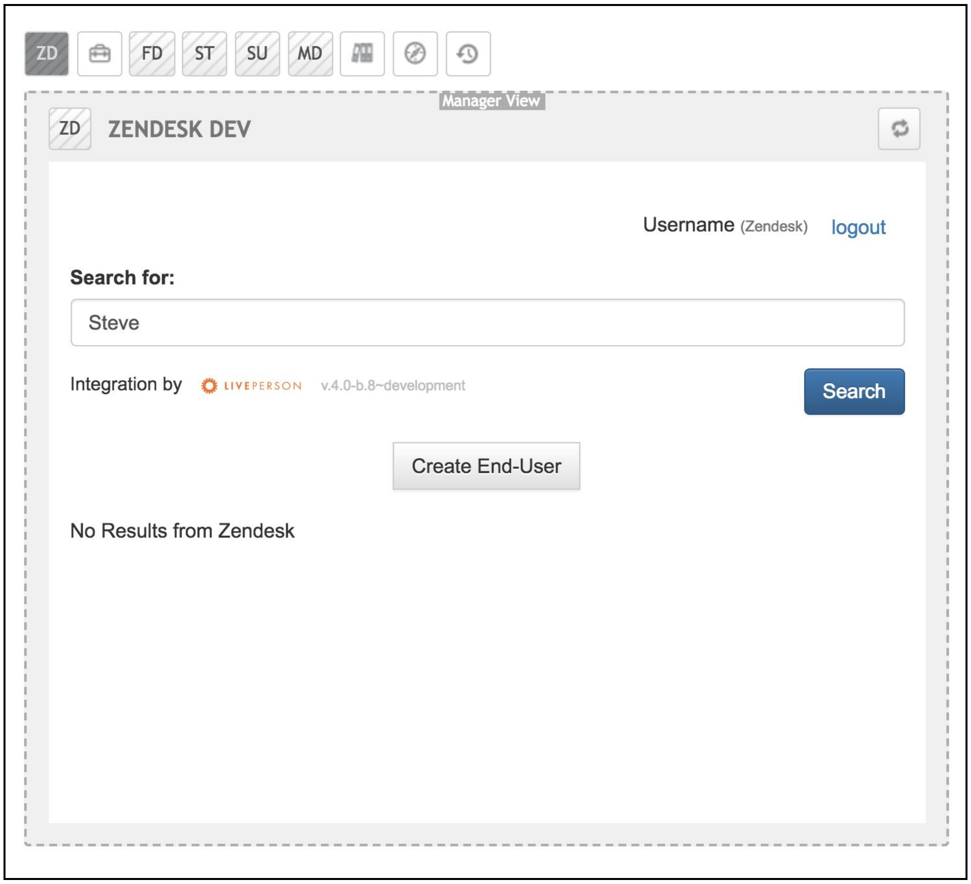
After this, you will be redirected to a page with the CRM login return messages. Click on "Close" or wait for it to close automatically after 5 seconds

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

- Try to access your CRM instance directly with the same credentials used to make sure they are valid
- Check the Admin Panel settings following this guide
- Check the key settings in CRM following this guide

Note! Make sure there are no blank spaces in the values entered in the settings.

Then the chosen CRM data will be loaded into the widget:



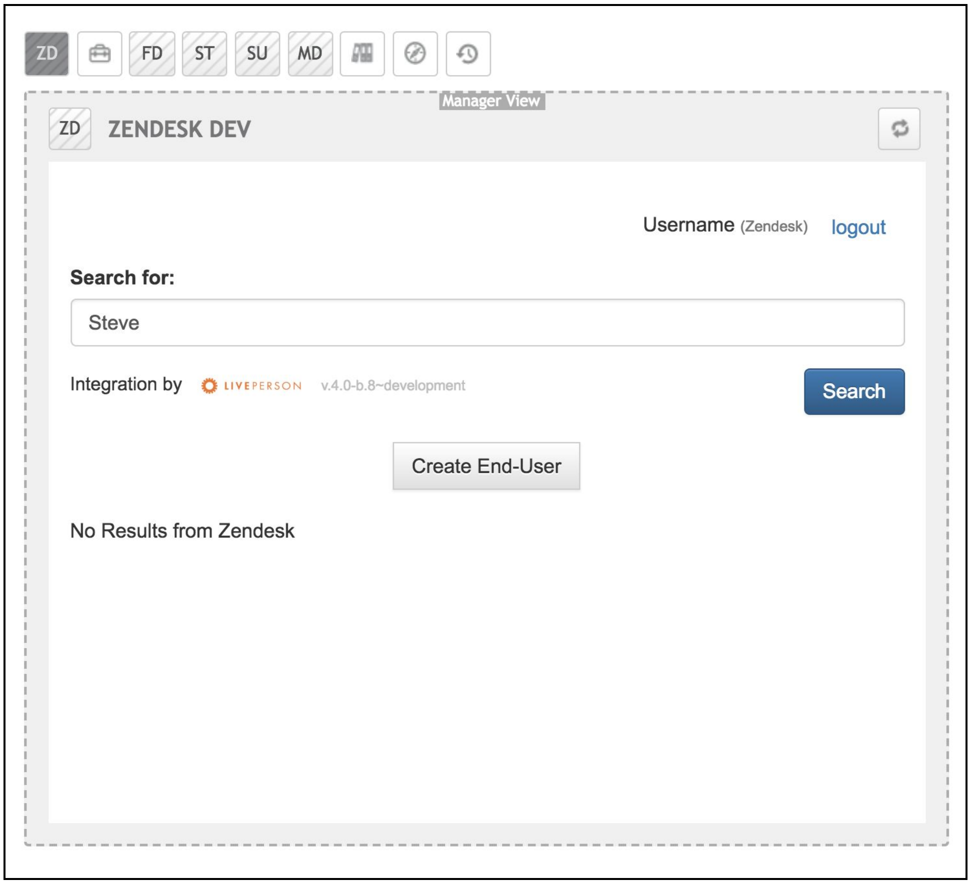
Custom Functionalities

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

Search Records

The search bar in the Widget enables you to search for any matching contents in following standard Zendesk objects:

- End-Users Object
- Tickets 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.

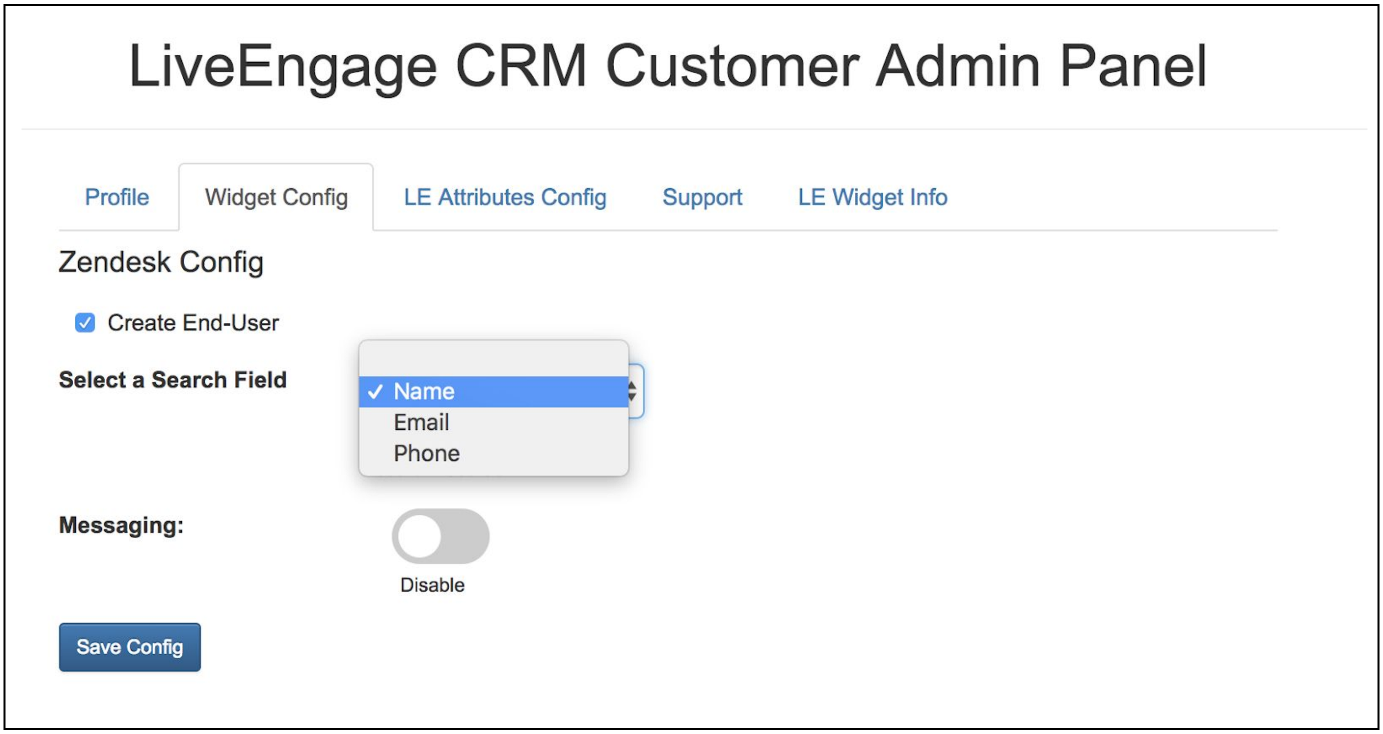
Search Records Filter/Fields

For Zendesk there are options to filter searches by:

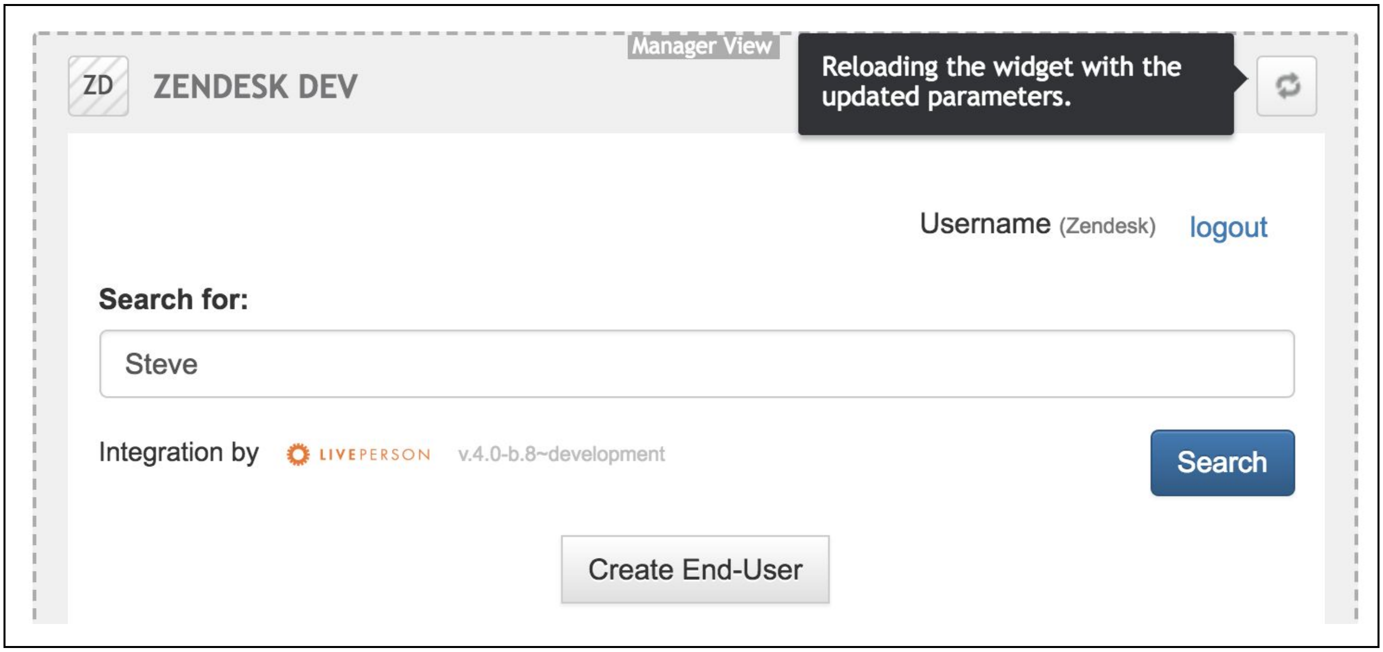
- Name
- Email
- Phone

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.

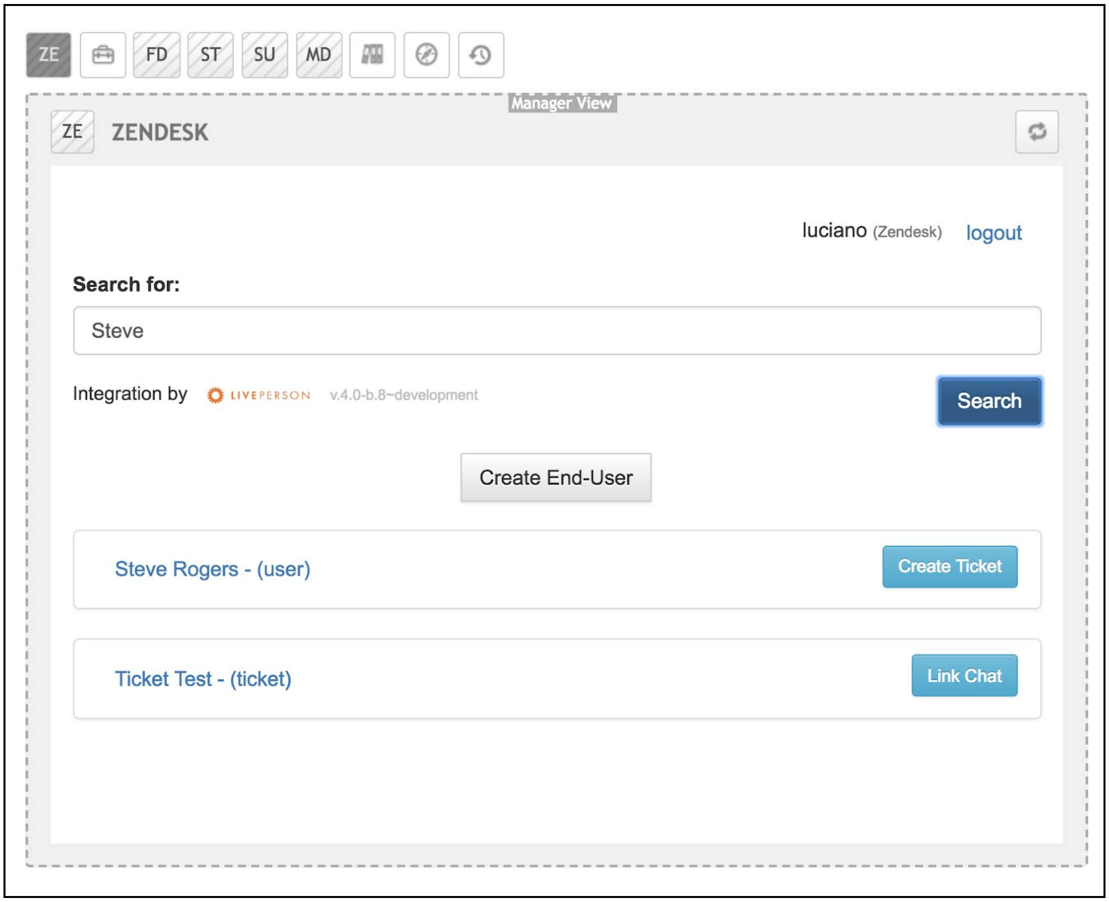


For new settings to take effect, you need to reload the widget in Live Engage. To do this, just click on the icon at the top of the widget on the right:

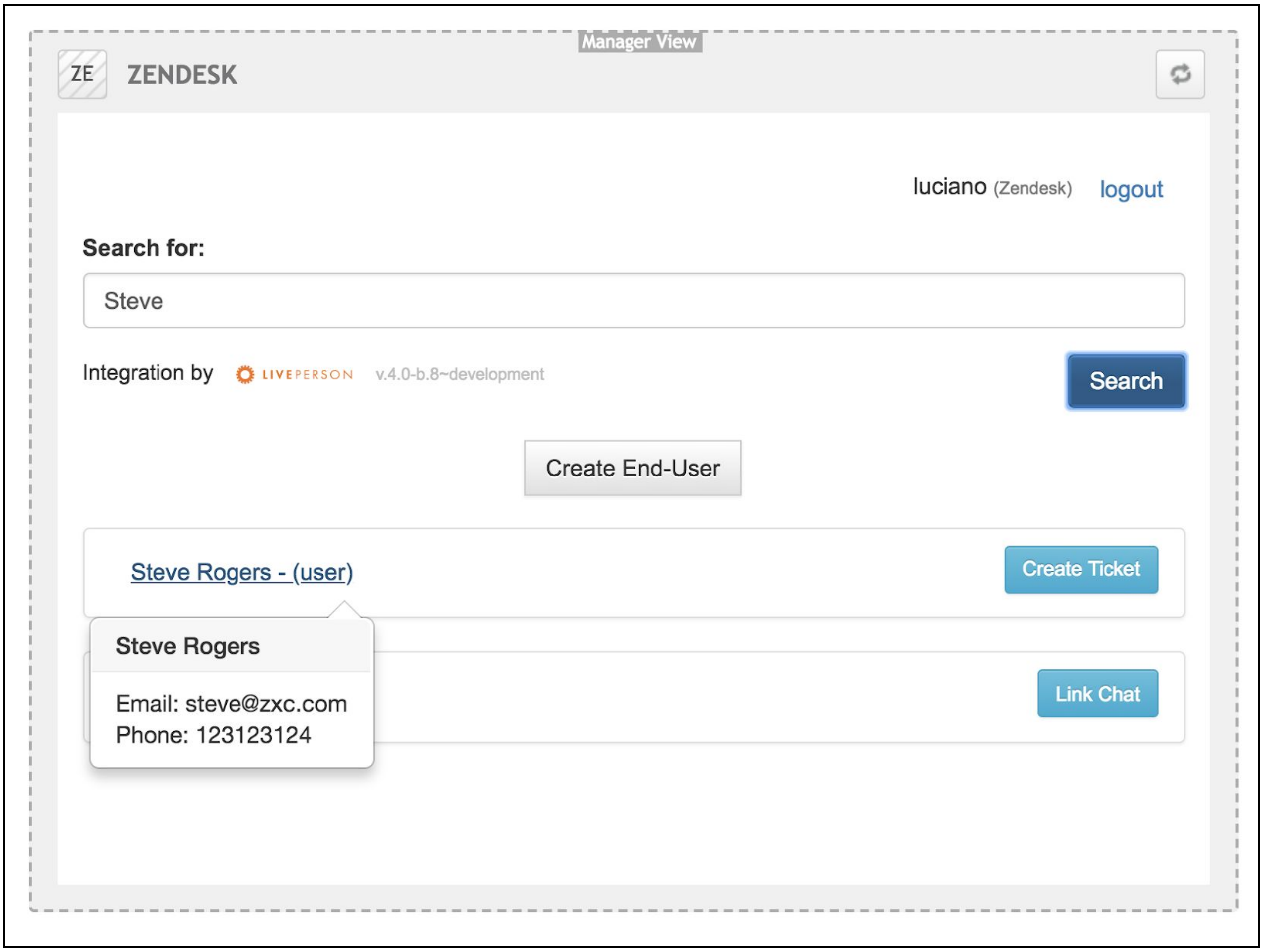


View Records

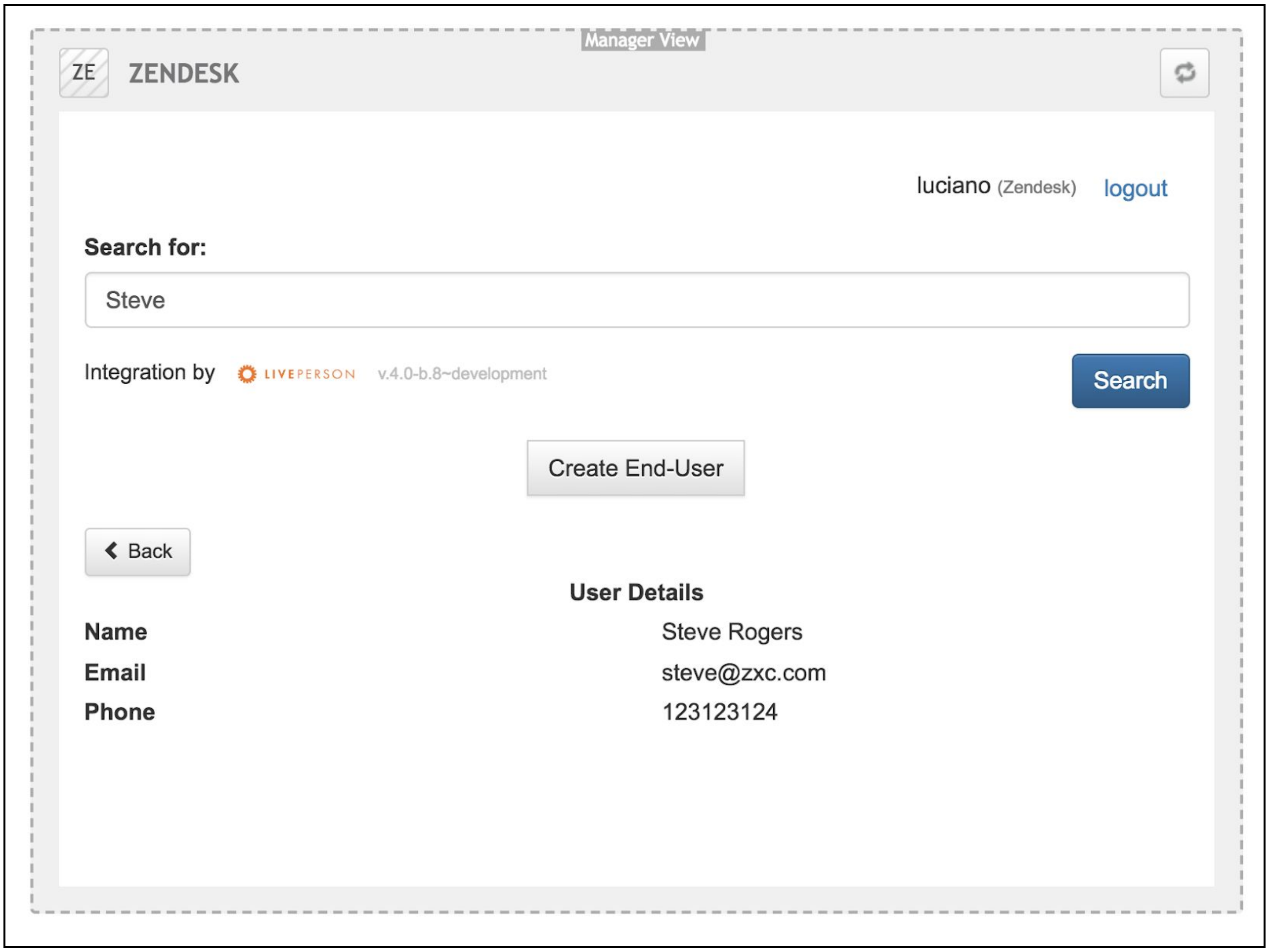
Here is a sample listing of search records. In this case, the search is configured with the filter by NAME, and all data that has the search field value as part of the data are listed. Beside the value of each data, in parentheses one can observe the type (USER and TICKET).



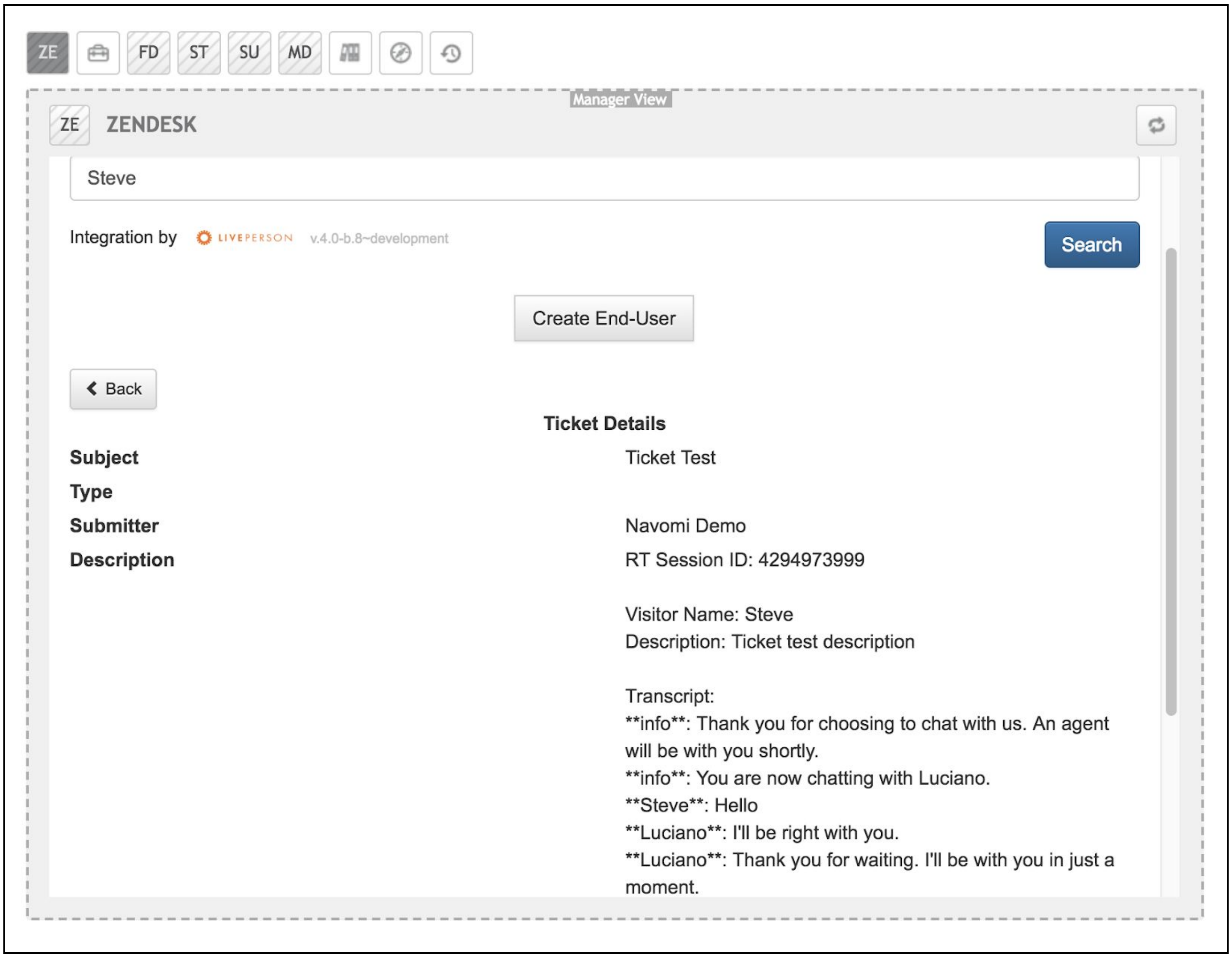
Hovering over resulting search records will popup min-details window showing additional information about the record:



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



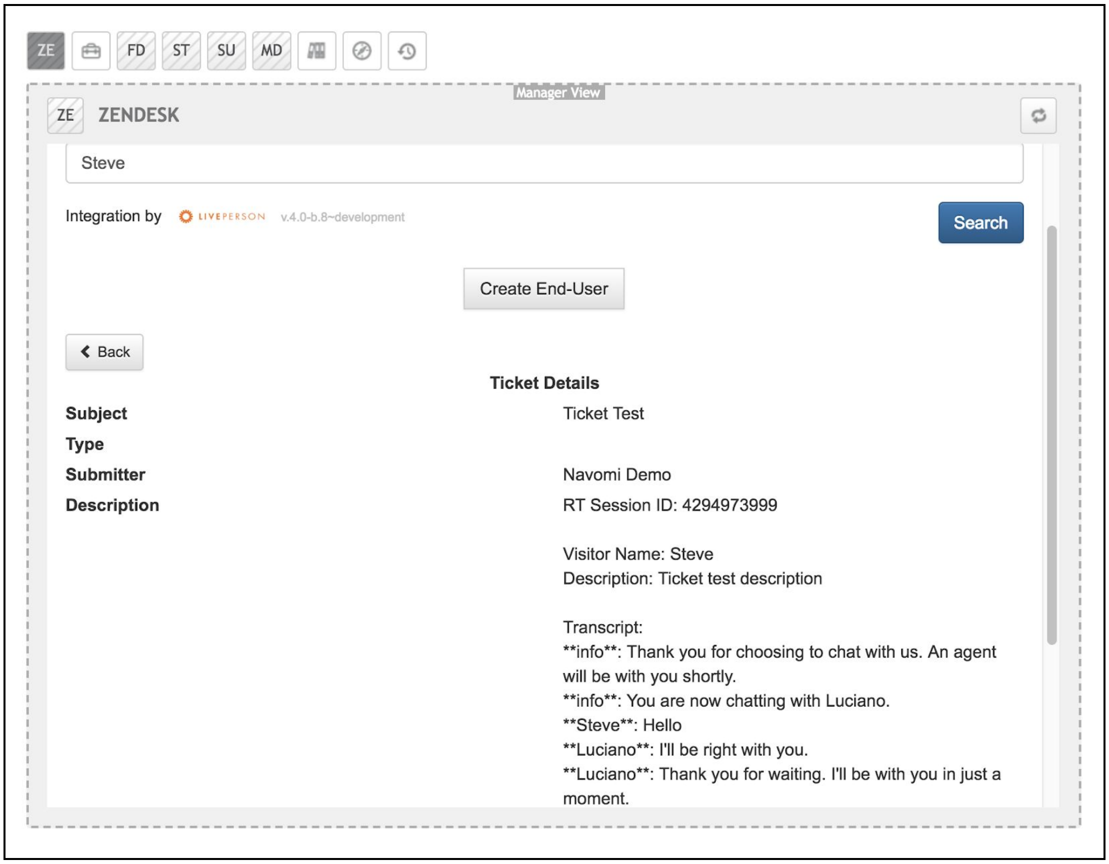
And here is an example of Ticket:



View Transcript Associated With Records

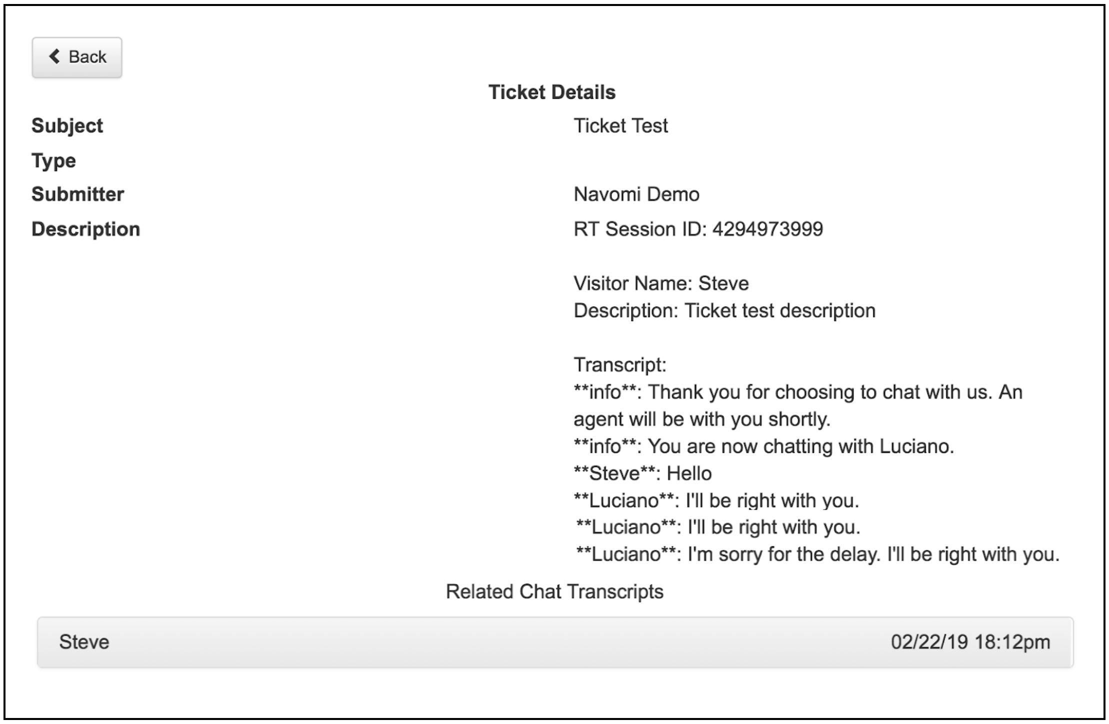
To view chat history, click on the link of the record. It will expand out and showing the information in the top section.

This is the format showed when a ticket was created:



When click on "Link Chat" to a ticket:

The transcripts are listed in the end of record:



Back

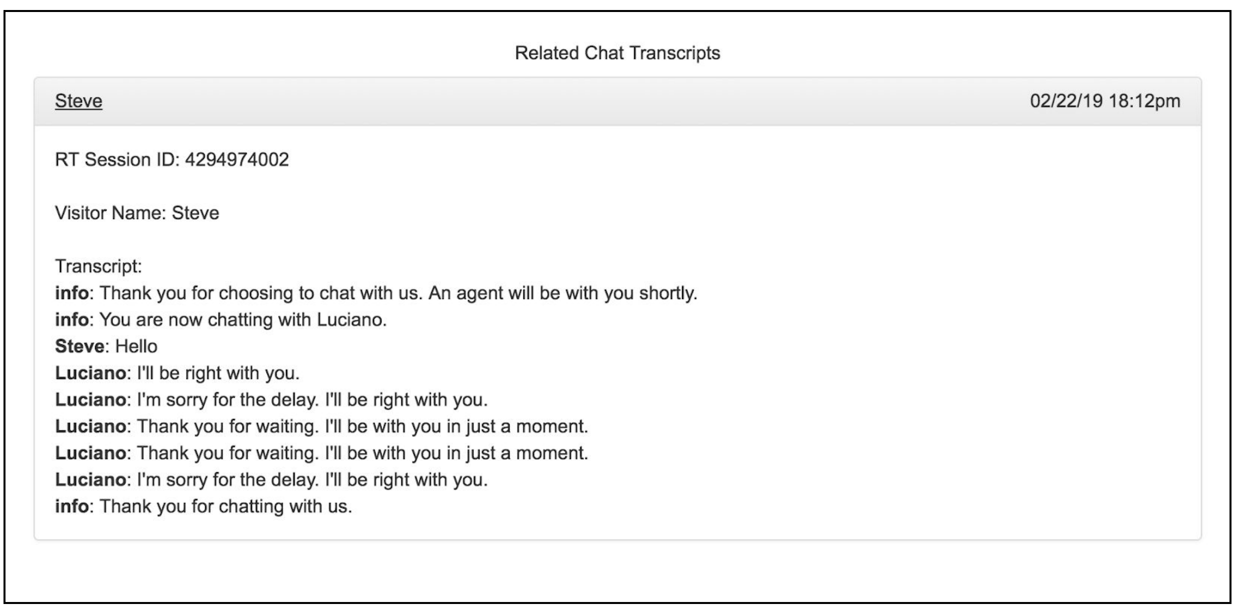
Ticket Details

Subject	Ticket Test
Type	
Submitter	Navomi Demo
Description	RT Session ID: 4294973999 Visitor Name: Steve Description: Ticket test description Transcript: **info**: Thank you for choosing to chat with us. An agent will be with you shortly. **info**: You are now chatting with Luciano. **Steve**: Hello **Luciano**: I'll be right with you. **Luciano**: I'll be right with you. **Luciano**: I'm sorry for the delay. I'll be right with you.

Related Chat Transcripts

Steve 02/22/19 18:12pm

- 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:



Related Chat Transcripts

Steve 02/22/19 18:12pm

RT Session ID: 4294974002

Visitor Name: Steve

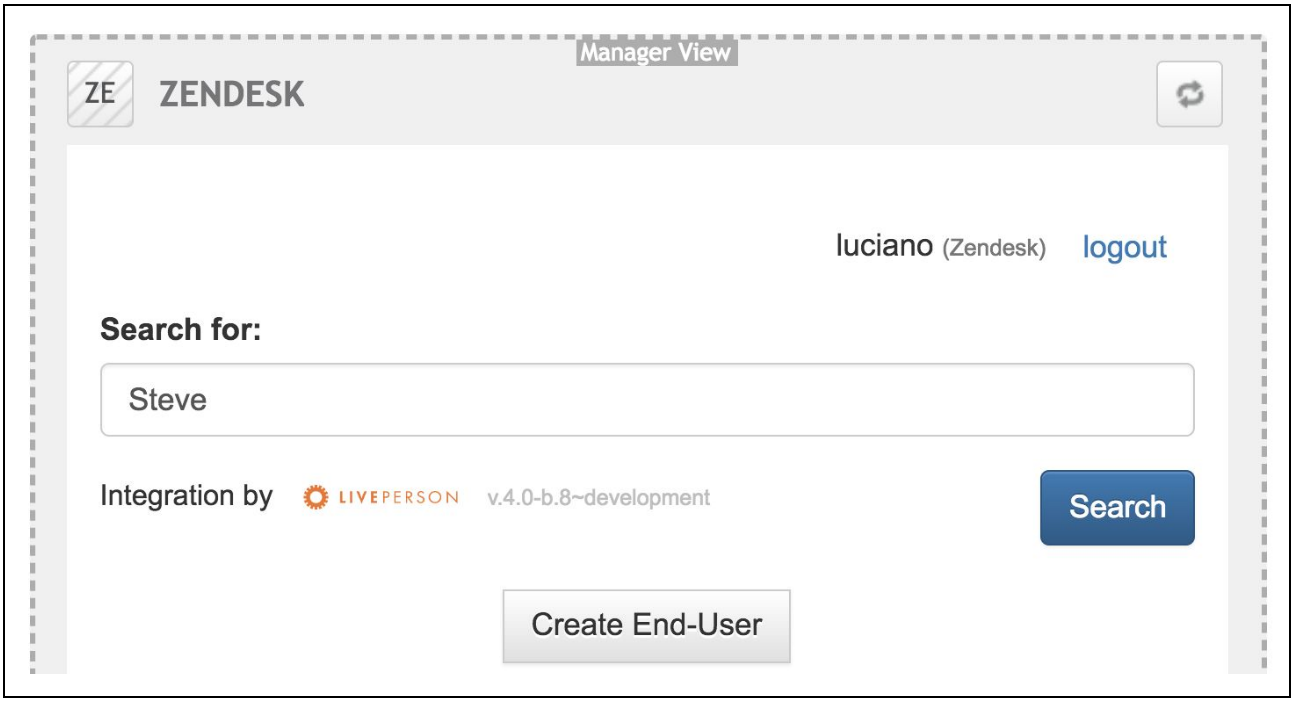
Transcript:
info: Thank you for choosing to chat with us. An agent will be with you shortly.
info: You are now chatting with Luciano.
Steve: Hello
Luciano: I'll be right with you.
Luciano: I'm sorry for the delay. I'll be right with you.
Luciano: Thank you for waiting. I'll be with you in just a moment.
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.
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 Zendesk provide the following features:

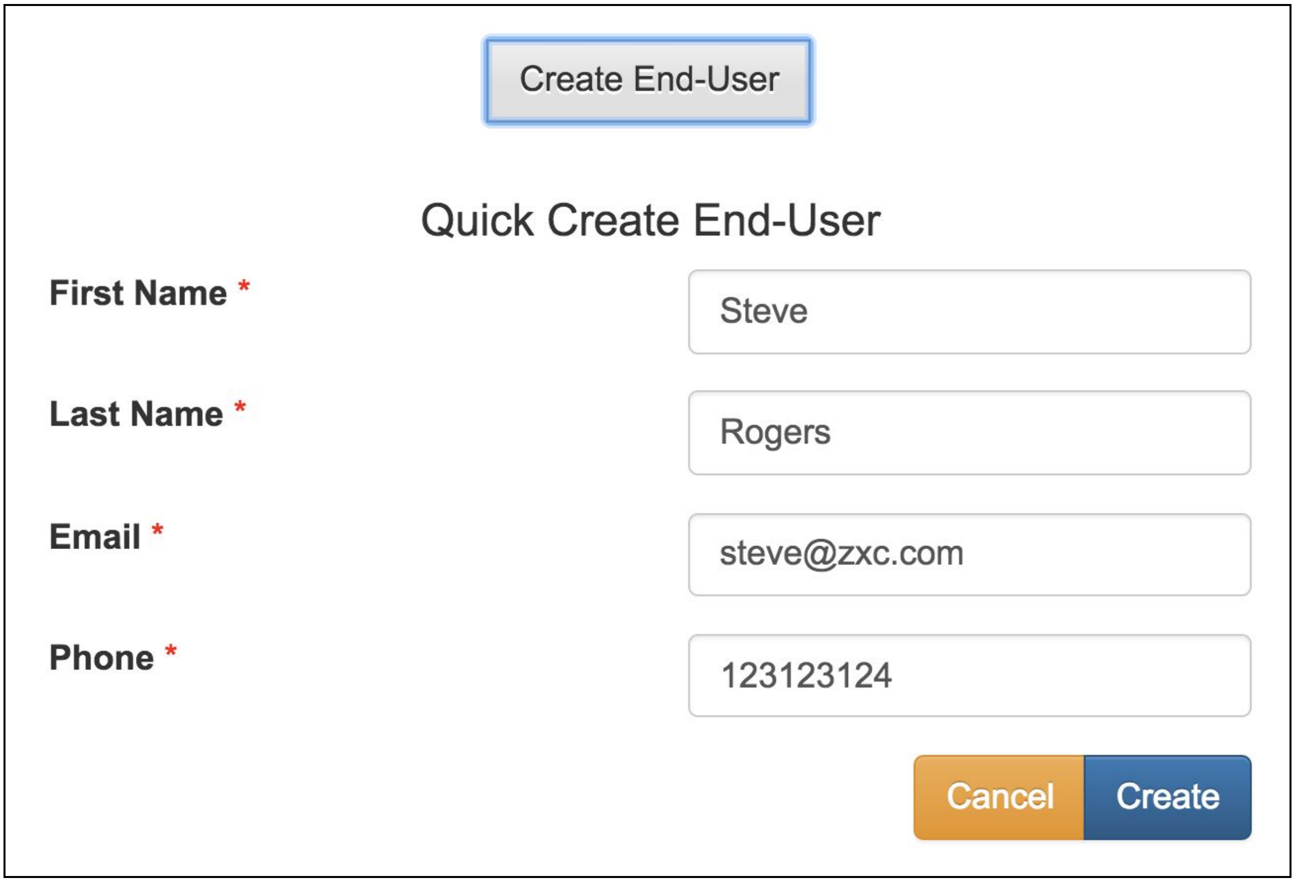
- Create End-User
- Create Ticket



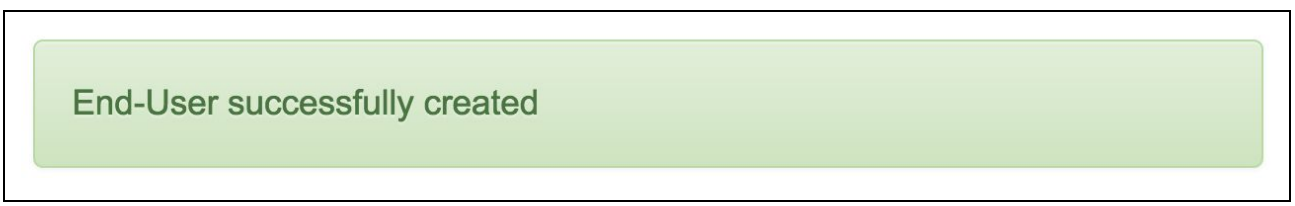
Create End-User

In case you want to create a new “End-User” record, click on the "Create End-User".

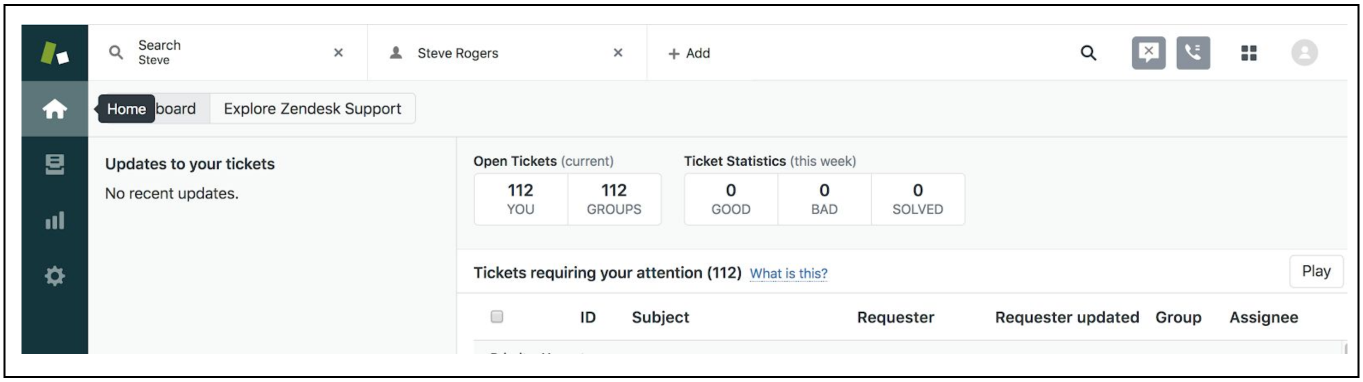
- Fill in all the relevant fields in the form
    - All required fields are denoted with an asterisk (First Name, Last Name, Email, Phone Number).
- Some of these fields will be automatically populated from the answers provided in the pre-chat survey (if pre-chat survey is enabled).
- Click “ Create” to save.



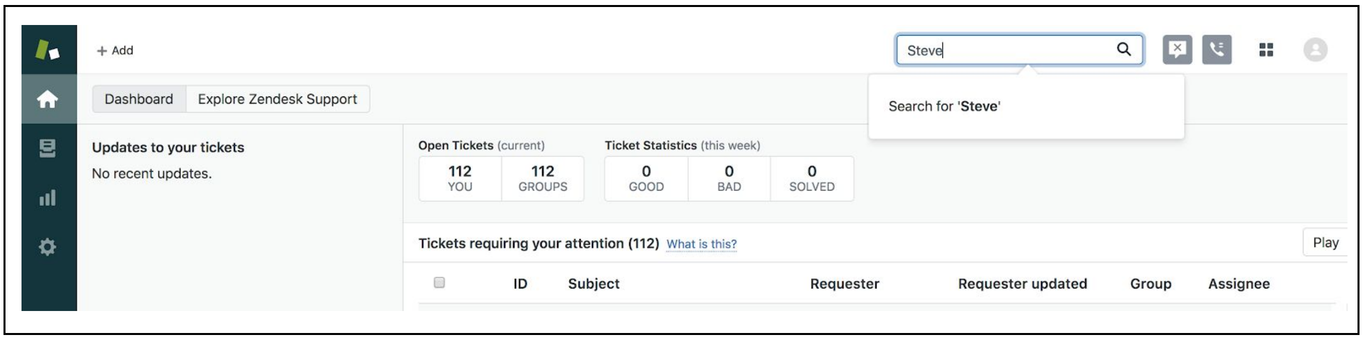
When the record is entered successfully, the message will be displayed:



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

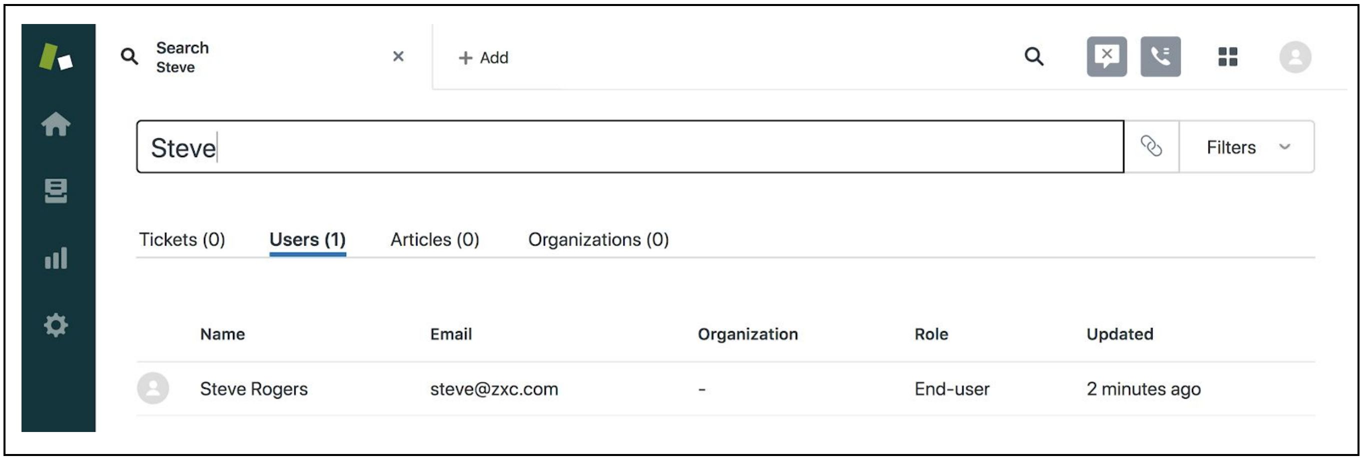


In Home, click on 🔍 to do a search, insert the value to be searched and press "Enter":

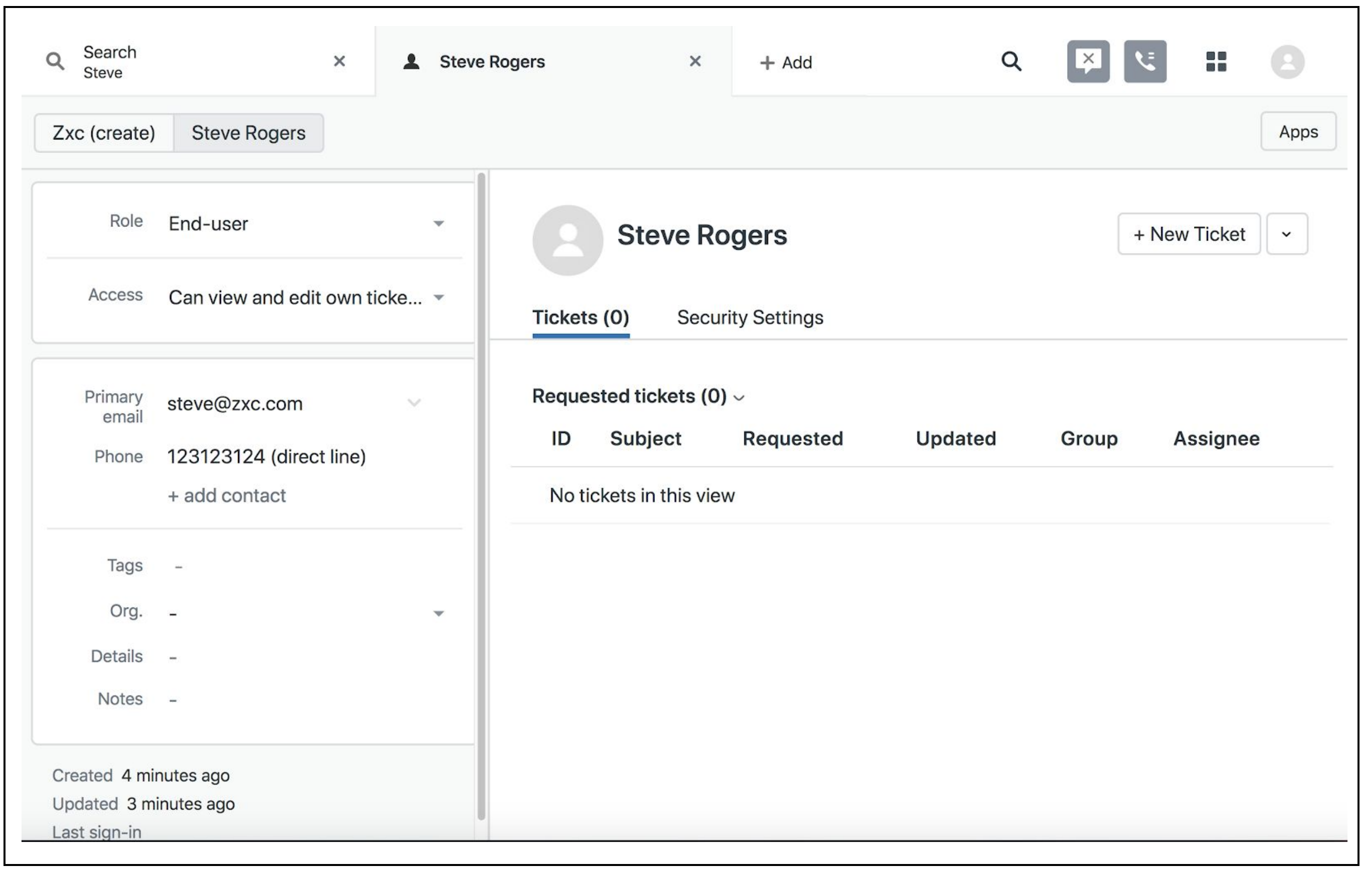


The list of records of the searched value will be displayed:

Click on "Users" to show the users records:

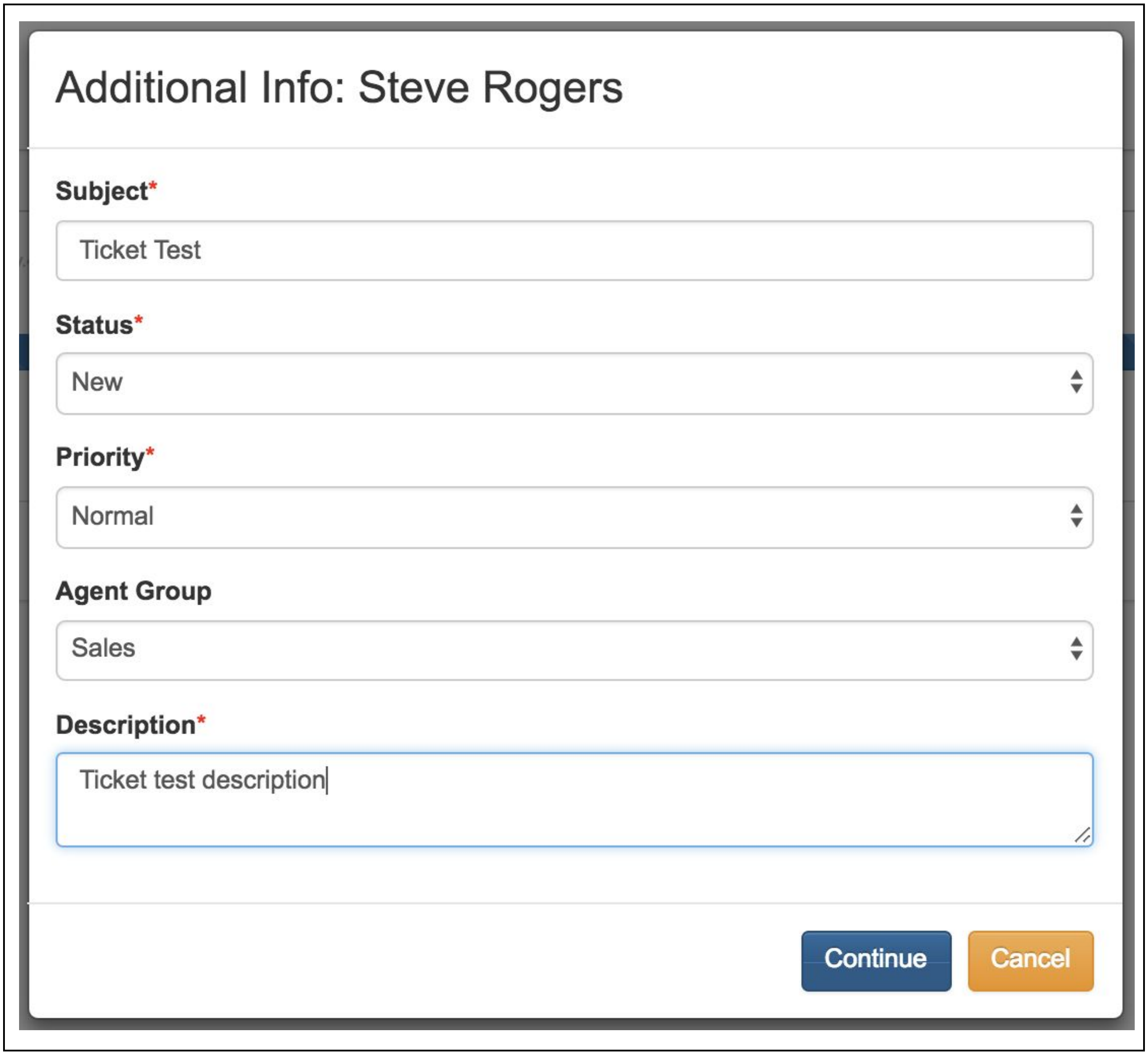


And when you click on an User, the window with the detailed data of this record opens:



Create Ticket

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

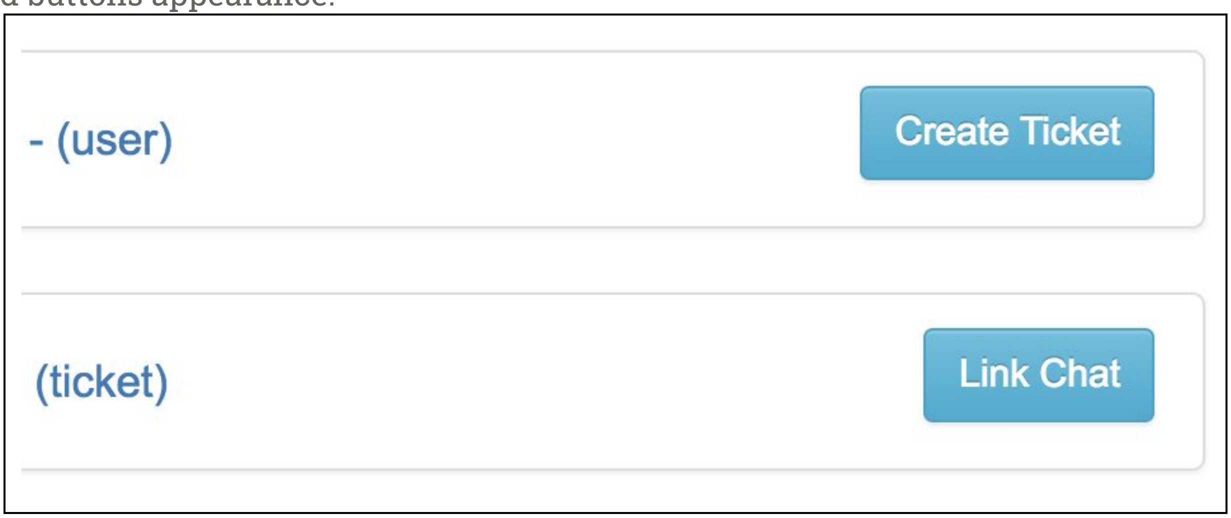


When the record is entered successfully, the message will be displayed:

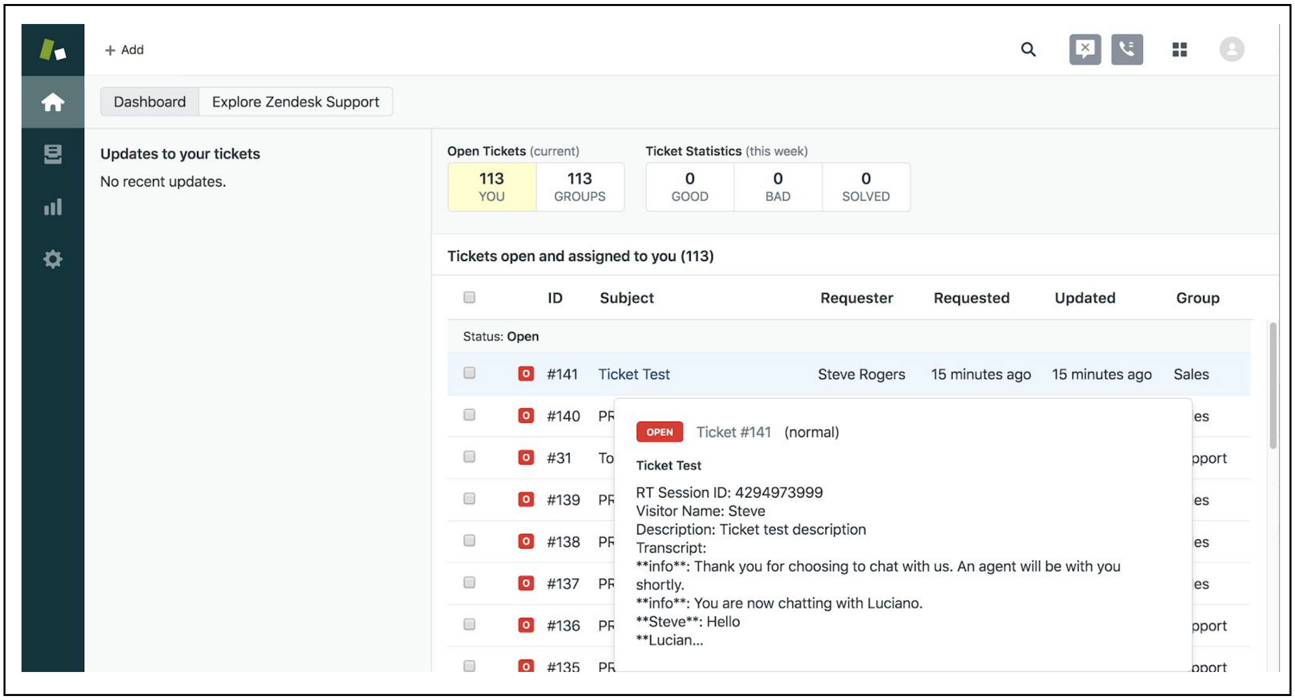
Note! *“Create Ticket” can only be done when the chat session has ended. The “Create Ticket” button is disabled throughout an active engagement.*

Disabled buttons appearance:

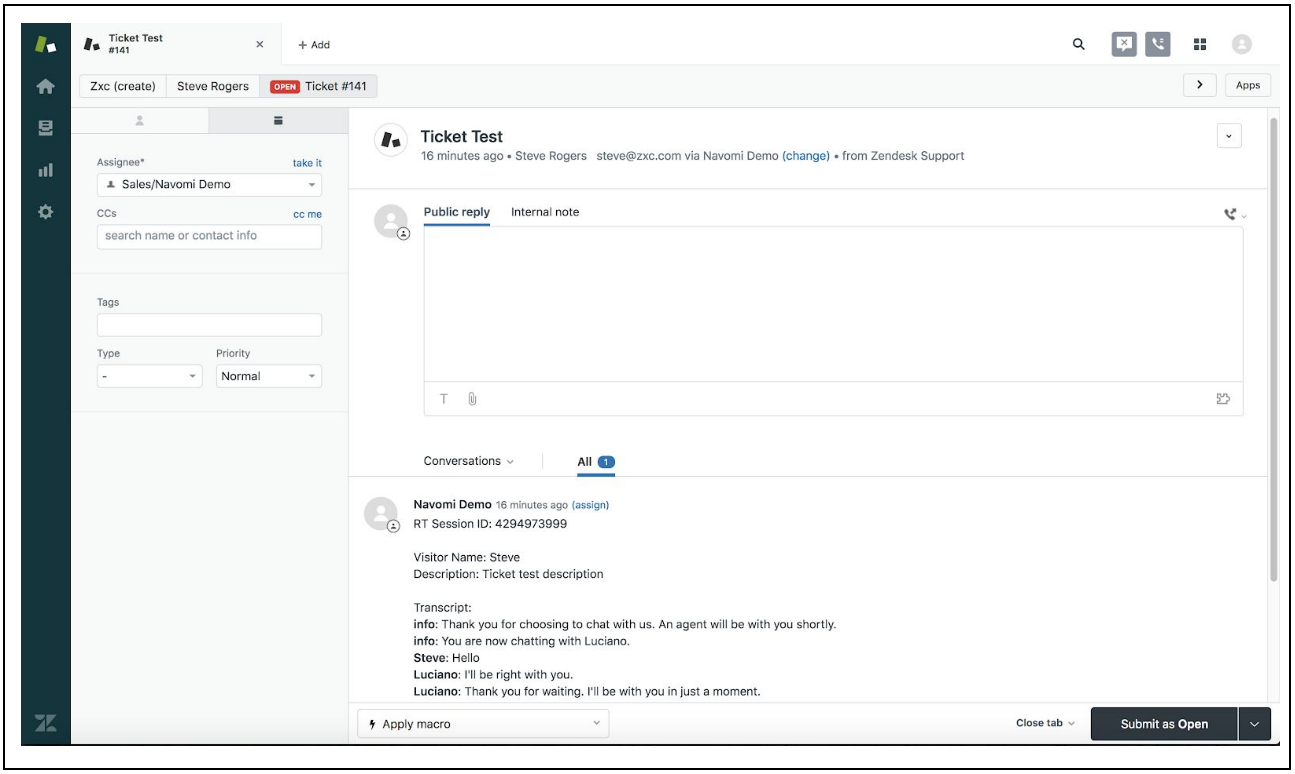
Enabled buttons appearance:



Note where this record will be stored in CRM system itself. You can see and access it in Dashboard:



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



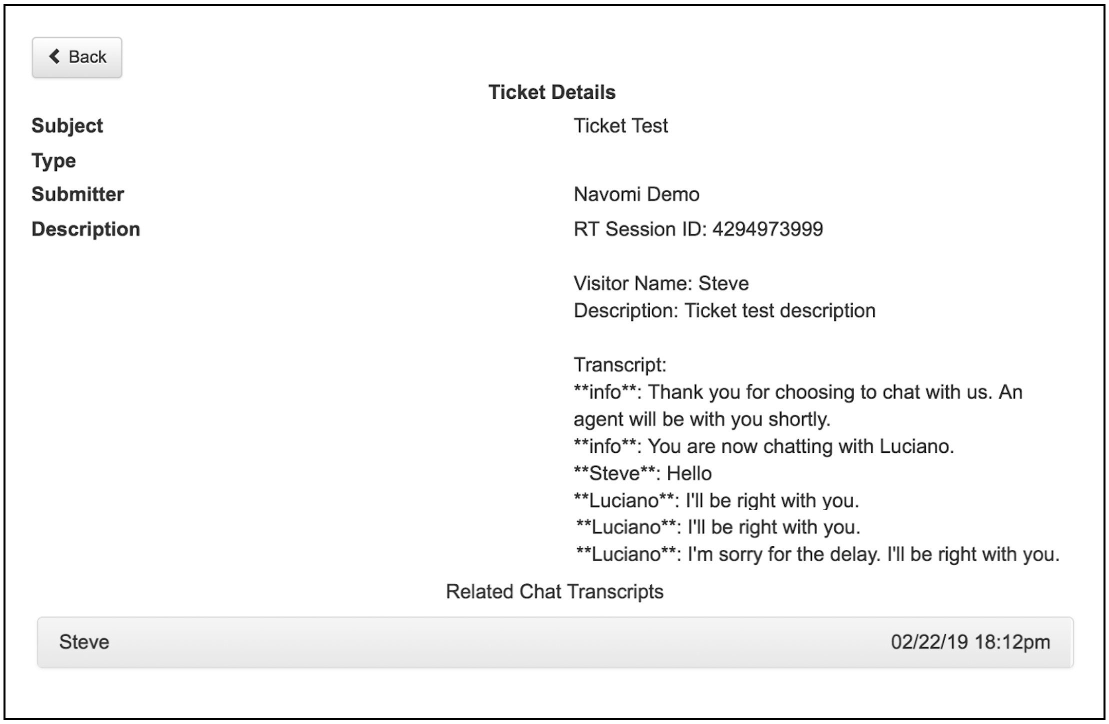
Link Chat Transcripts to Entity

In case the chat is related to an existing Ticket, or User, you can link the chat to that relevant record in Zendesk.

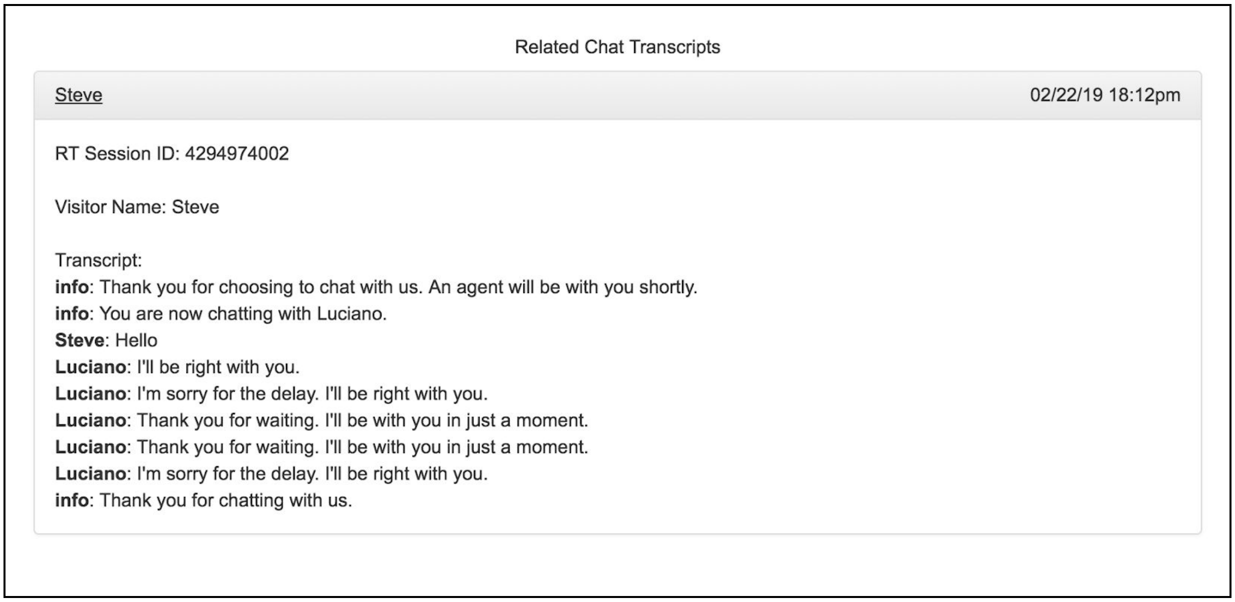
- You can attach a current chat transcript to a User or Ticket record by clicking on the “Link Chat” button once the session has ended.

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.

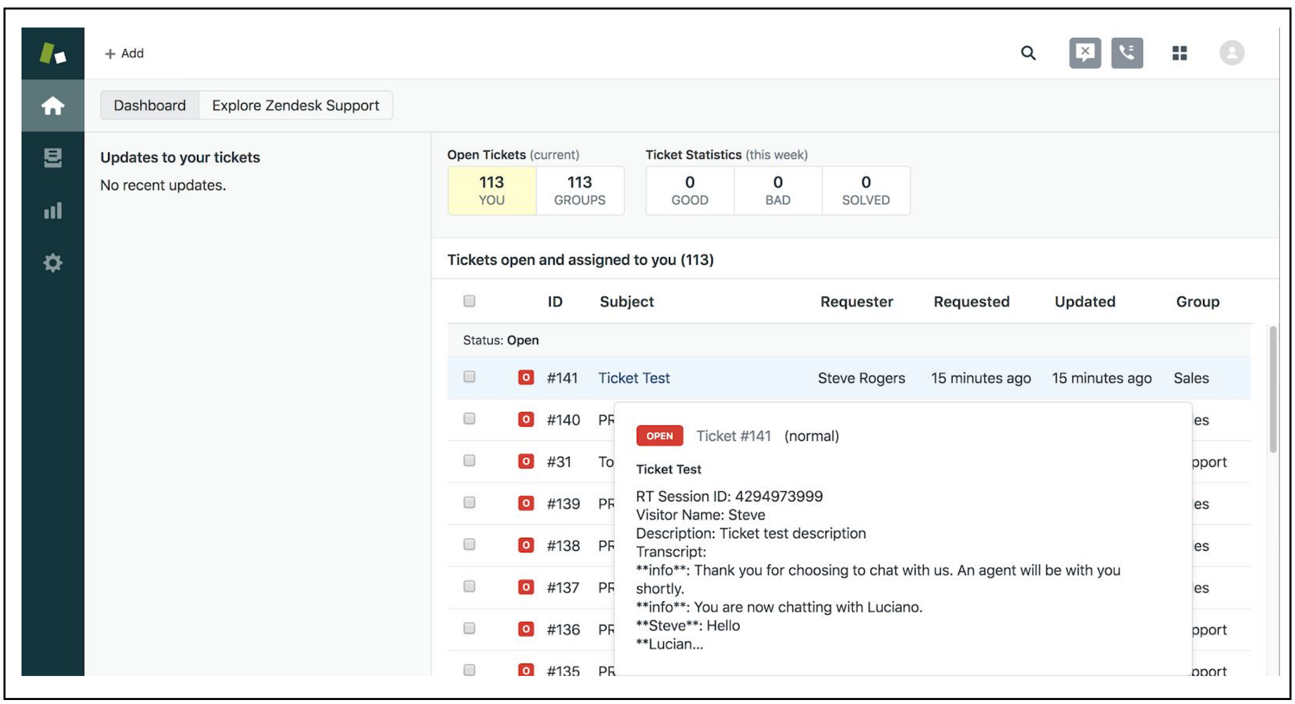


- Click on the specific transcript ID to see the full details of the chat transcripts as shown in the screen below:

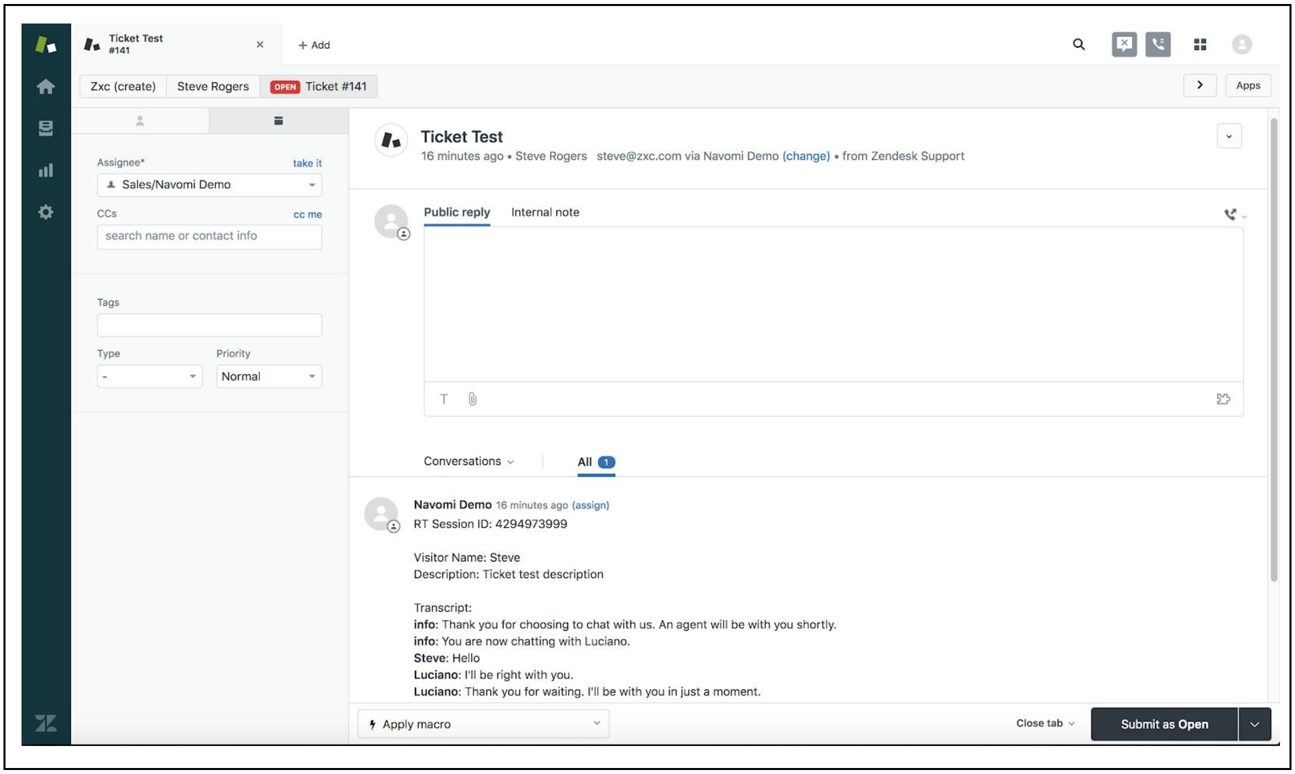


Note where this record will be stored in CRM system itself:

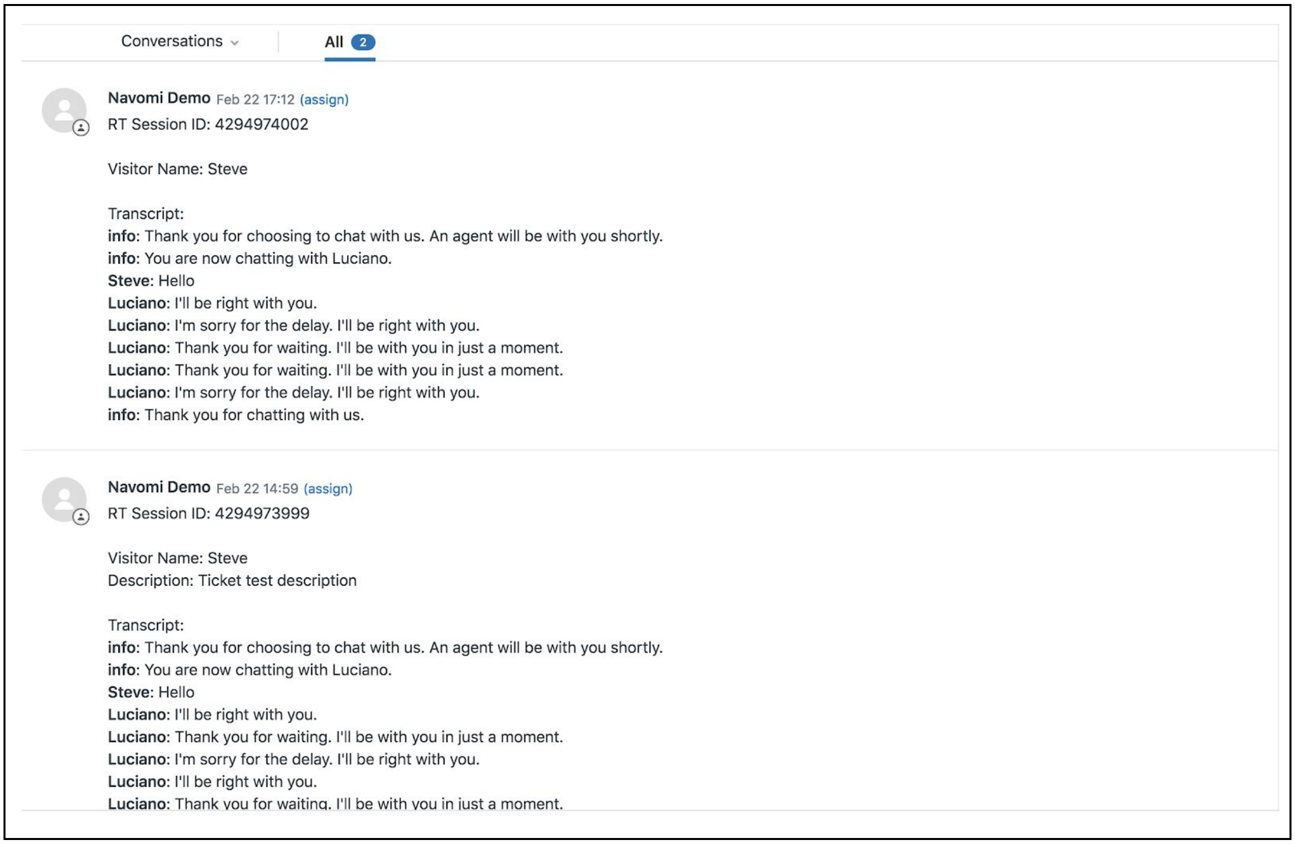
To see all linked chats to specific ticket, go to Zendesk Homepage where are listed all existent tickets:



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



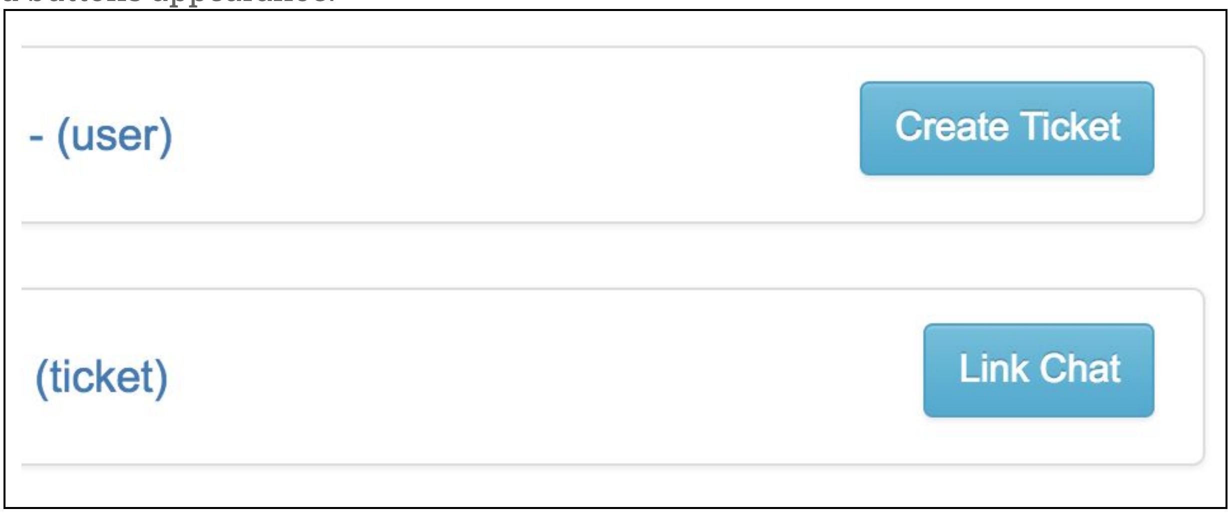
At the bottom of the page, all the chat transcripts for the ticket are listed:



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