

ZENDESK Integration Guide

LiveEngage CRM Widget

by LivePerson, INC

last revised on: 2019-03-27

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Version Management

Date	Version	Owner	Change History
3/5/2017	1.0	Estefania Londono	Full Final Document
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

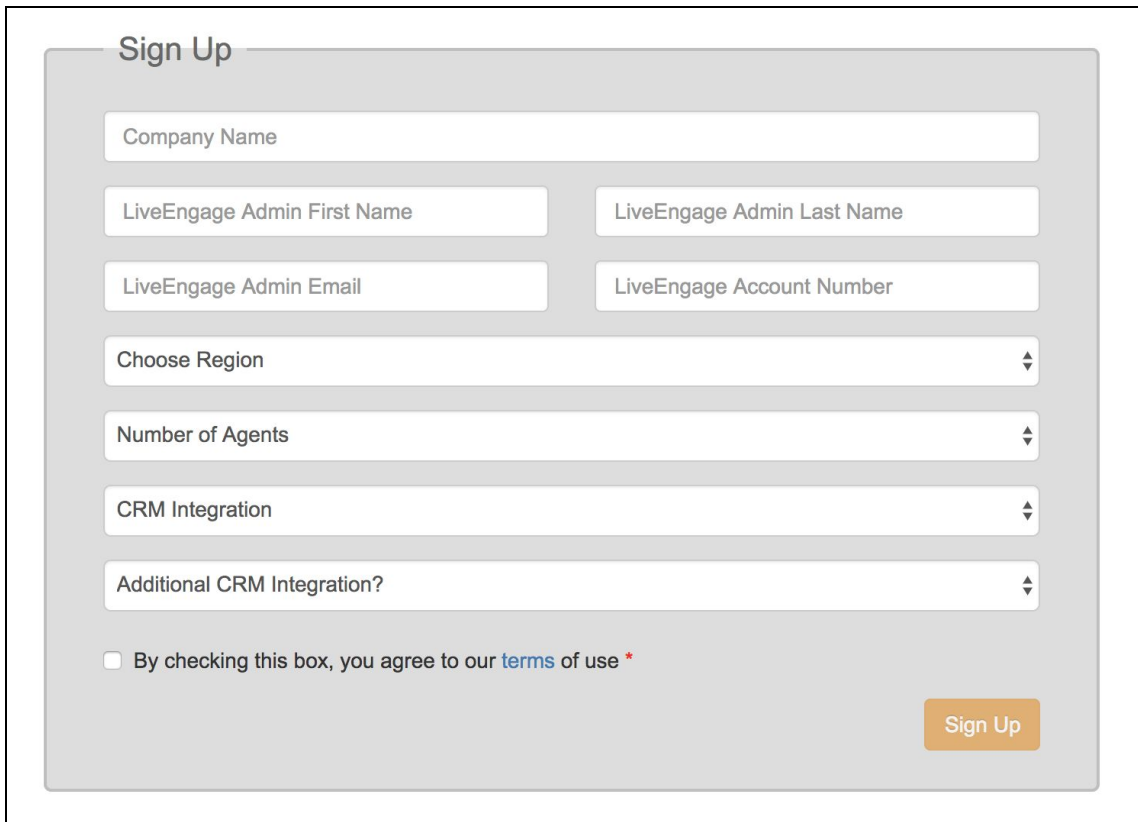
Below is an overview of the required widget settings:

- 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.

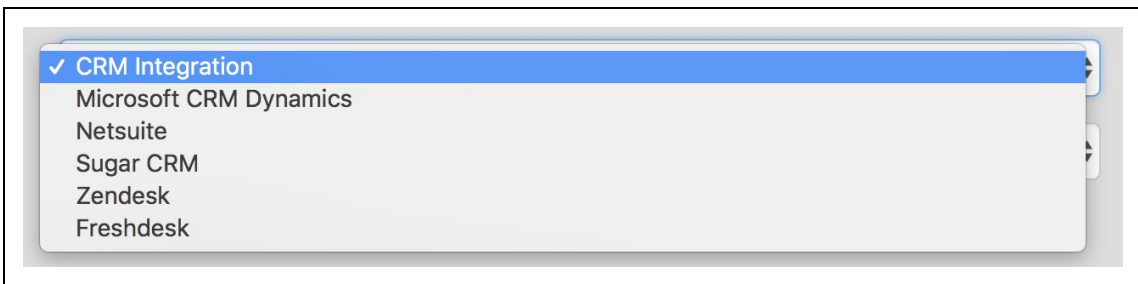
1. Go to the signup URL: <https://lpcrm.fs.liveperson.com/signup>



The image shows a 'Sign Up' form with the following fields:

- Company Name
- LiveEngage Admin First Name
- LiveEngage Admin Last Name
- LiveEngage Admin Email
- LiveEngage Account Number
- Choose Region (dropdown)
- Number of Agents (dropdown)
- CRM Integration (dropdown)
- Additional CRM Integration? (dropdown)
- By checking this box, you agree to our [terms of use](#) *
- Sign Up button

2. Make sure you choose the right CRM within the "CRM Integration" drop-down



The image shows a dropdown menu for 'CRM Integration' with the following options:

- ✓ CRM Integration
- 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

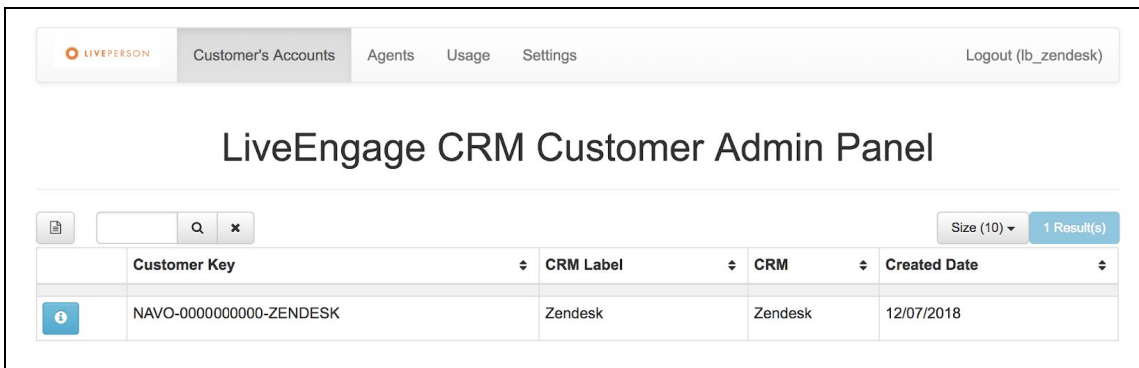
1. Make sure you receive the username and password from your Account Manager.
2. Go to the installation URL: <https://lpcrm.fs.liveperson.com/admin-panel>

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', and 'Settings' tabs, and a 'Logout (lb_zendesk)' 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)' indicator. Below the search bar 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-0000000000-ZENDESK', 'Zendesk', 'Zendesk', and '12/07/2018'. An information icon (i) is located to the left of the first row.

Customer Key	CRM Label	CRM	Created Date
NAVO-0000000000-ZENDESK	Zendesk	Zendesk	12/07/2018

- 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-0000000000-ZENDESK
CRM Type	Zendesk
CRM Label	Edit Zendesk
Subdomain	Edit <YOUR_CRM_SUBDOMAIN>
OAuth Client ID	Hide Edit <YOUR_UNIQUE_IDENTIFIER>
OAuth Client Secret	Hide Edit <OATH_SECRET_FROM_CRM>
Created At	08/08/2018

Agents (Deprecated)

Link: Admin Panel → Agents

This session will not be addressed as it is deprecated

The screenshot shows the LiveEngage CRM Customer Admin Panel with the 'Agents' tab selected in the navigation menu. The page title is 'LiveEngage CRM Customer Admin Panel'. Below the title, there is a 'New Agents' button. Underneath, there are two input fields labeled 'Username' and 'CRM'.

Usage

Link: Admin Panel → Usage

See the follow usage statistics from the account:

The screenshot shows the LiveEngage CRM Customer Admin Panel. At the top, there are navigation tabs: Customer's Accounts, Agents, Usage (selected), and Settings. A Logout (lb_zendesk) link is in the top right. Below the navigation is the title "LiveEngage CRM Customer Admin Panel". Underneath, there are tabs for Login Usage (selected), Agent Usage, Search Usage, and Link Chat Usage. The main heading is "Per Agent Login Count". There is a search bar and a "Size (10)" dropdown menu showing "2 Result(s)". A table displays the following data:

Agent Username	Last 7 Days Usage	Current Month Usage	Previous Month Usage	Total Logins
Luciano	0	0	1	3

Login Usage

See the login statistics from each Agent by:

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

This screenshot is identical to the one above, showing the LiveEngage CRM Customer Admin Panel with the "Per Agent Login Count" table for Agent Luciano.

Agent Username	Last 7 Days Usage	Current Month Usage	Previous Month Usage	Total Logins
Luciano	0	0	1	3

Agent Usage

See the login statistics from all Agents by:

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

The screenshot shows the 'LiveEngage CRM Customer Admin Panel' with the 'Search Usage' tab selected. The main heading is 'Total Agent Logins'. Below it, there is a table with columns: 'Last 7 Days Usage', 'Current Month Usage', 'Previous Month Usage', and 'Total Logins'. The values are 3, 4, 2, and 8 respectively. There is also a 'Size (10)' dropdown and a '1 Result(s)' button.

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

The screenshot shows the 'LiveEngage CRM Customer Admin Panel' with the 'Search Usage' tab selected. The main heading is 'Search Count'. Below it, there is a table with columns: 'Past 7 Days Usage', 'Current Month Usage', 'Past Month Usage', and 'Total Usage Till Date'. The values are 10, 10, and 56 respectively. There is also a 'Size (10)' dropdown and a '1 Result(s)' button.

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

LiveEngage CRM Customer Admin Panel

Login Usage Agent Usage Search Usage **Link Chat Usage**

Create Ticket Count

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

Link Chat Count

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.

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](#)

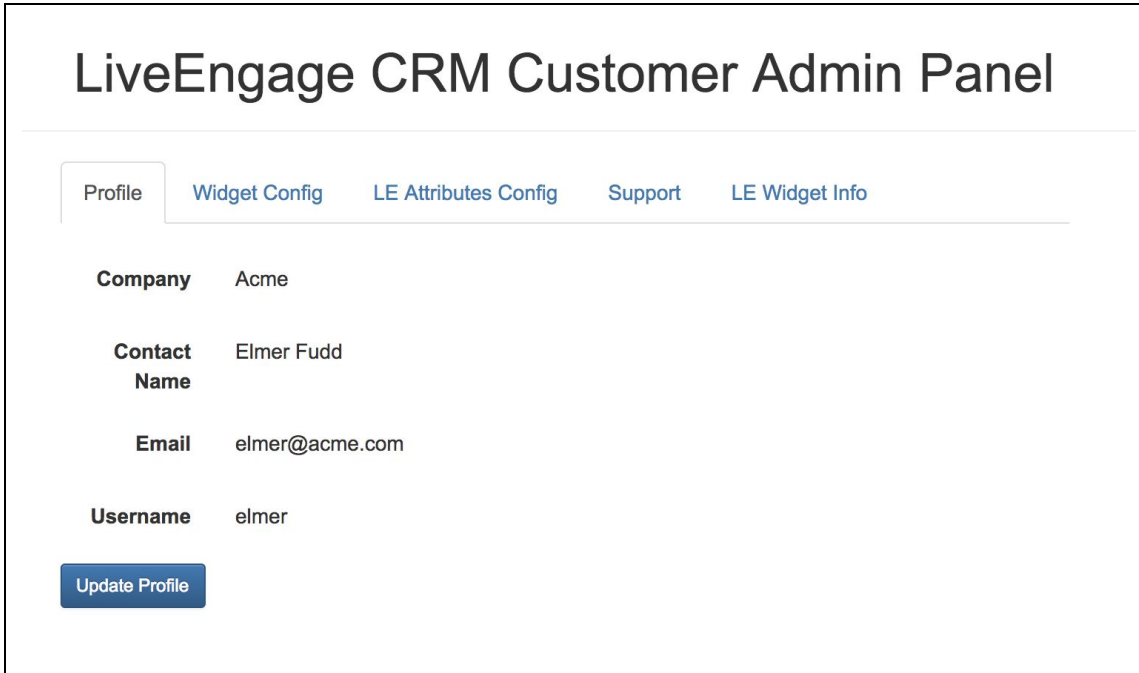
Profile

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.



The screenshot displays the 'LiveEngage CRM Customer Admin Panel'. At the top, there is a navigation menu with five tabs: 'Profile' (which is selected), 'Widget Config', 'LE Attributes Config', 'Support', and 'LE Widget Info'. Below the navigation, the profile information is listed in a table-like format:

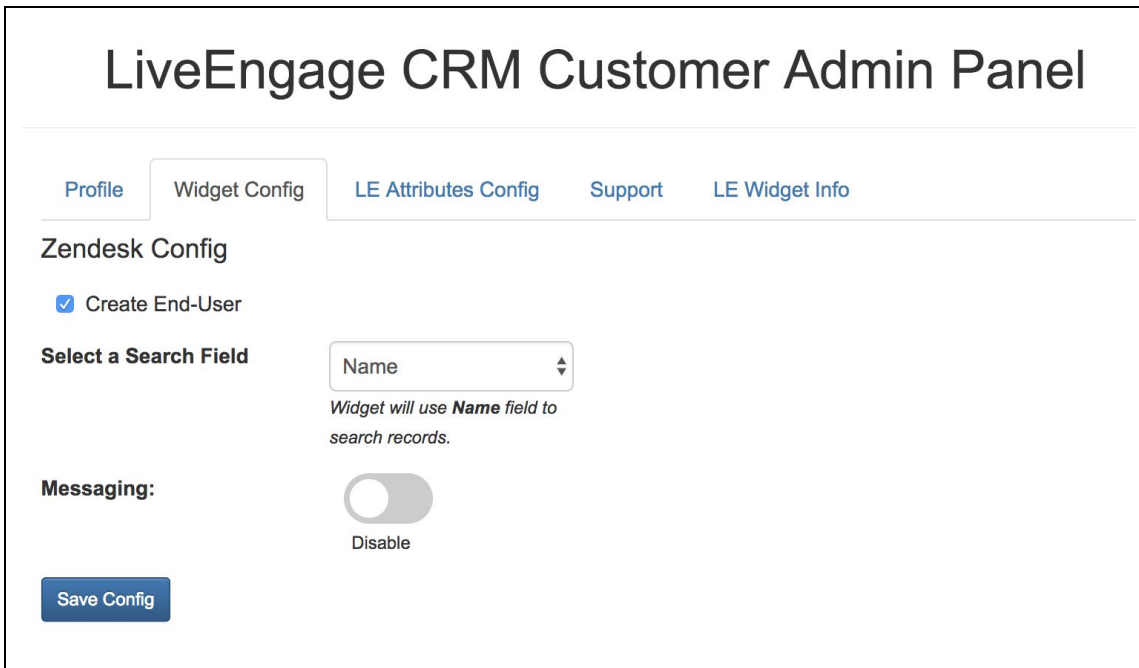
Company	Acme
Contact Name	Elmer Fudd
Email	elmer@acme.com
Username	elmer

At the bottom left of the profile information, there is a blue button labeled 'Update Profile'.

Widget Config

Link: Admin Panel → Settings → Widget Config




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



LE Attributes Config

Link: Admin Panel → Settings → LE Attributes Config

The LE Attributes are Live Engage variables that can be captured by Widget during an engagement. The complete list is in the table called Unassigned Attributes.

- To access complete list, click on the button LE Attributes: 
- To add to capture, please select an attribute(s) from Unassigned Attributes table and drop it to Assigned Attributes table using 
- To remove, please select an attribute(s) from Assignee Attributes table and click .

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

LiveEngage CRM Customer Admin Panel

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

LE Attributes: ⓘ

Unassigned Attributes:

- VisitorInfo**
- waitTime
- country
- device
- isp
- organization
- operatingSystem
- browser
- visitStartTime
- IpAddress
- CustomerInfo**
- customerId
- balance
- currency
- socialId
- imei
- userName
- companySize
- accountName
- role
- lastPaymentDate
- registrationDate
- storeZipCode
- storeNumber
- MarketingInfo**
- originatingChannel
- affiliate
- campaignId

Assigned Attributes:

- VisitorInfo**
- visitorName
- city
- CustomerInfo**
- type
- status

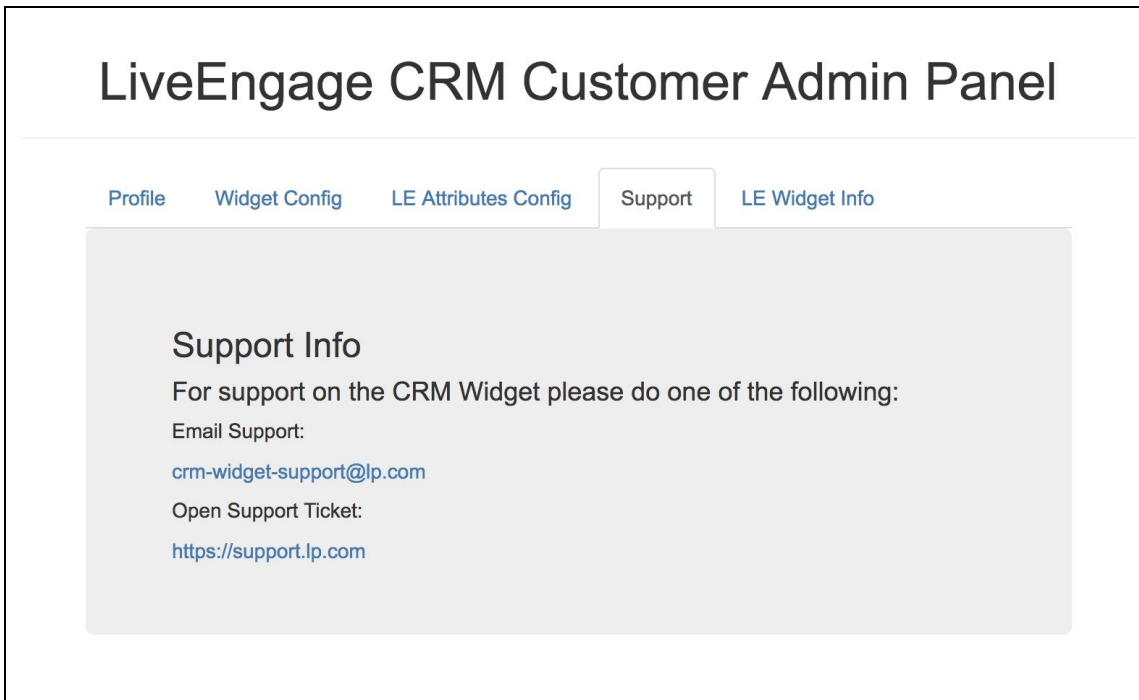
>

<

Support

Link: Admin Panel → Settings → Support

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



LE Widget Info

Link: Admin Panel → Settings → LE Widget Info

See the LE Widget URL that will be required to setup the widget within LiveEngage. Version and Build of Widget can also be viewed within this tab.

LiveEngage CRM Customer Admin Panel

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

LE Widget URL: **<https://lpcrm.fs.liveperson.com?apiKey=NAVO-0000000000-ZENDESK>**
Callback URL Zendesk: **<https://lpcrm.fs.liveperson.com/oauth2z>**
[Zendesk Setup Documentation](#)
Version:
4.0
Build:
8-development

Customer Accounts

Link: Admin Panel → Customer's Accounts

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

- Customer Key: This value is used to identify the license in the Live Engage.
- CRM Type: Which CRM is registered to this license.
- CRM label: Name to identify the current license.
- 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")

LiveEngage CRM Customer Admin Panel

[← Back](#)

License Info

Customer Key	NAVO-0000000000-ZENDESK
CRM Type	Zendesk
CRM Label	Edit Zendesk
Subdomain	Edit <YOUR_CRM_SUBDOMAIN>
OAuth Client ID	Hide Edit <YOUR_UNIQUE_IDENTIFIER>
OAuth Client Secret	Hide Edit <OATH_SECRET_FROM_CRM>
Created At	08/08/2018

Widget Config

Link: Admin Panel → Settings → Widget Config

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

LiveEngage CRM Customer Admin Panel

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

Zendesk Config

Create End-User

Select a Search Field

*Widget will use **Name** field to search records.*

Messaging: Disable

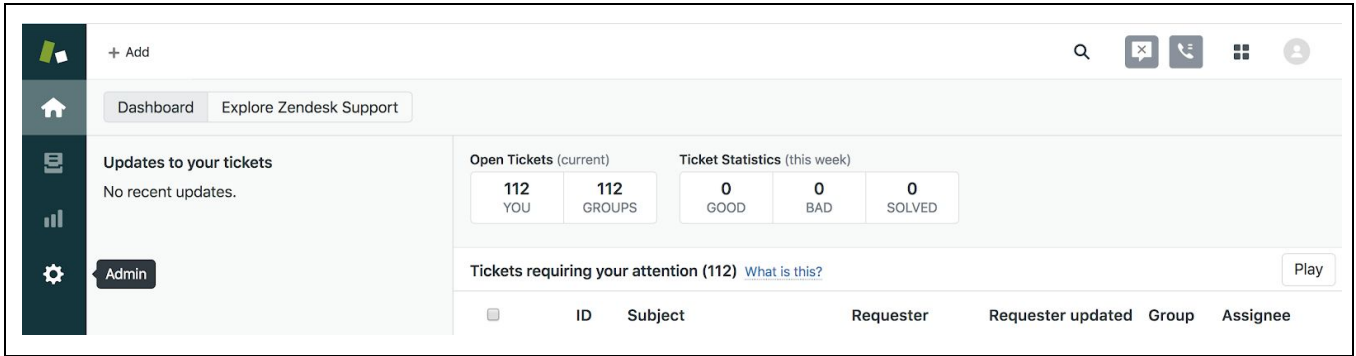
[Save Config](#)

- Enabling/disabling entities that can be created within Zendesk:
 - Create End-User
- Select a Search Field:
 - Name
 - Email
 - Phone
- Enabling/disabling Messaging

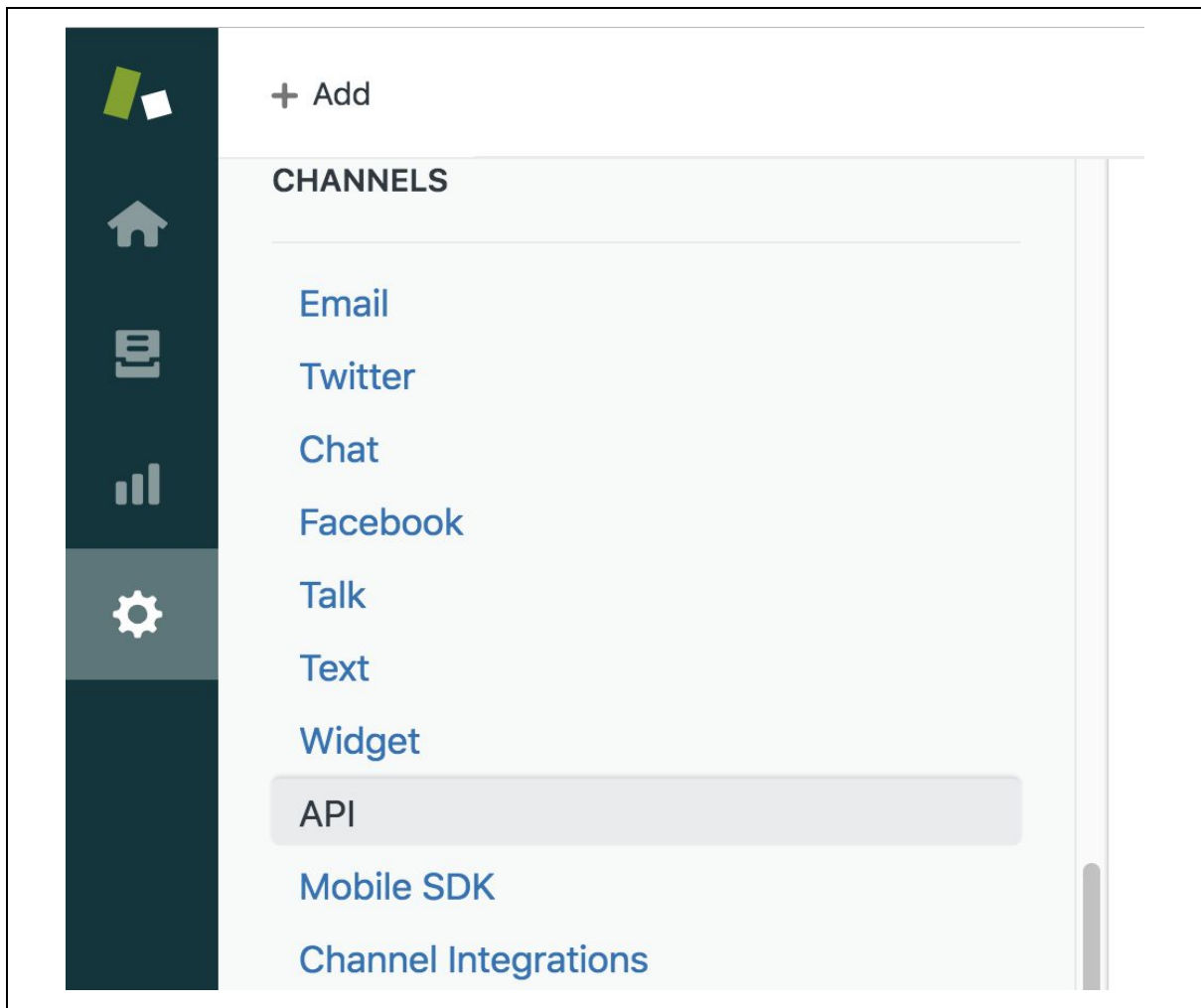
Configure CRM

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:

Zendesk API

Settings **OAuth Clients** Activity Target Failures

If you want to use a global OAuth client, create a client in this account and submit a request to globalize it through our developer portal.

All OAuth Clients (1) 

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.

LE - ZENDESK Integration Guide


<YOUR_CLIENT_NAME>

Client Name
Your client name shown to users when asked to grant access to your application or when viewing the list of apps that have been granted access.

Description
A short description of your client for users when they're considering granting access to your application.

Company
This name is displayed when users are asked to grant access to your application. The name helps users understand to whom they're granting access.

Logo
Choose an image (JPG or PNG) to display when users are asked to grant access to your application.



Unique Identifier
This is the name of your client for use in code. Example: my_awesome_app. This identifier is not shown to Zendesk users. You can change the initial suggestion.

Redirect URLs
Specify the URL or URLs that Zendesk should use to redirect users after they decide whether or not to authorize your application to access Zendesk. The URLs must be absolute and not relative, https (unless localhost or 127.0.0.1), and newline-separated.

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

Please store the secret that will appear

After clicking OK, you'll see the secret only once. You'll always be able to generate a new one later.

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".

Secret

This secret token is used by apps redirecting to your client. Please note that the secret is displayed in its entirety only once, so it's important you save it in a safe place.

9e45a4b46ac5dbbb1d62096ae097605a6f6ac43c85fa3864409a20cd900ce117 Copy

⚠ Make sure to copy and store this token. We won't show it again after you click Save or leave this page.

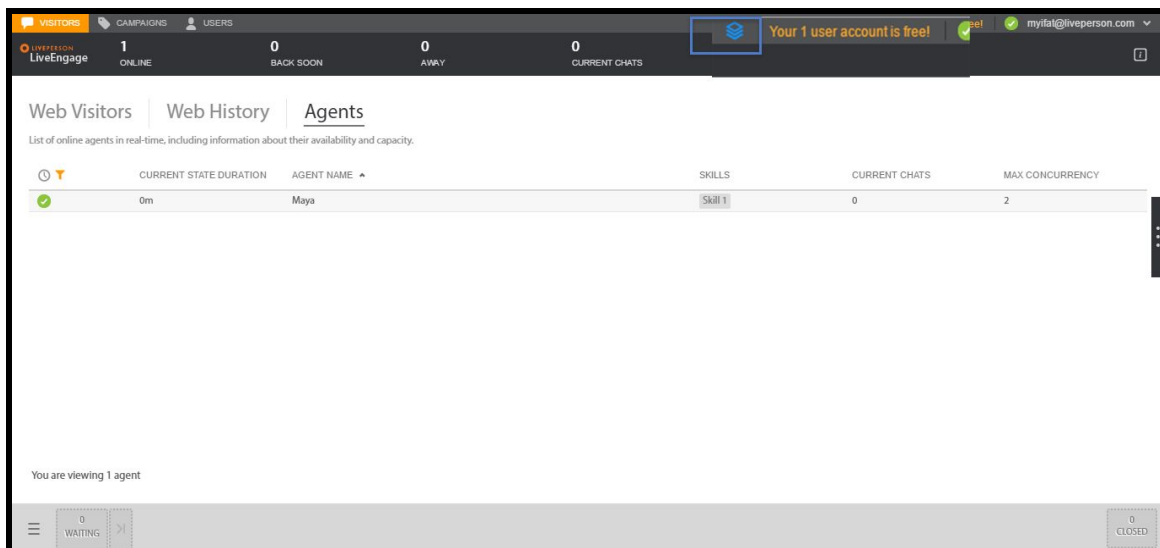
Close Save

Adding Widget in LiveEngage Console

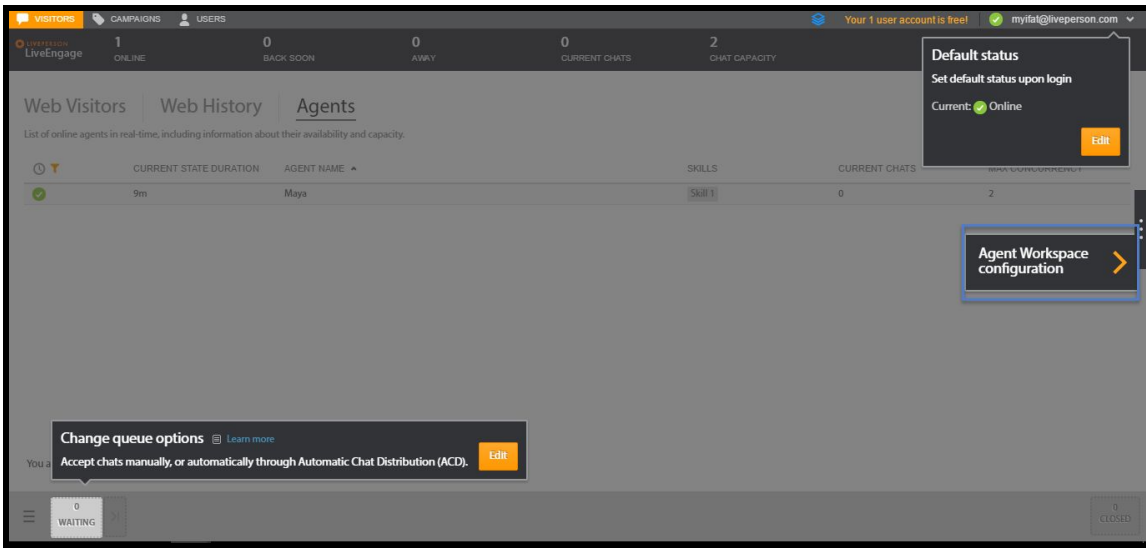
Now that you've updated the CRM Widget profile and license information, it is time to go to LiveEngage and configure the widget.

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

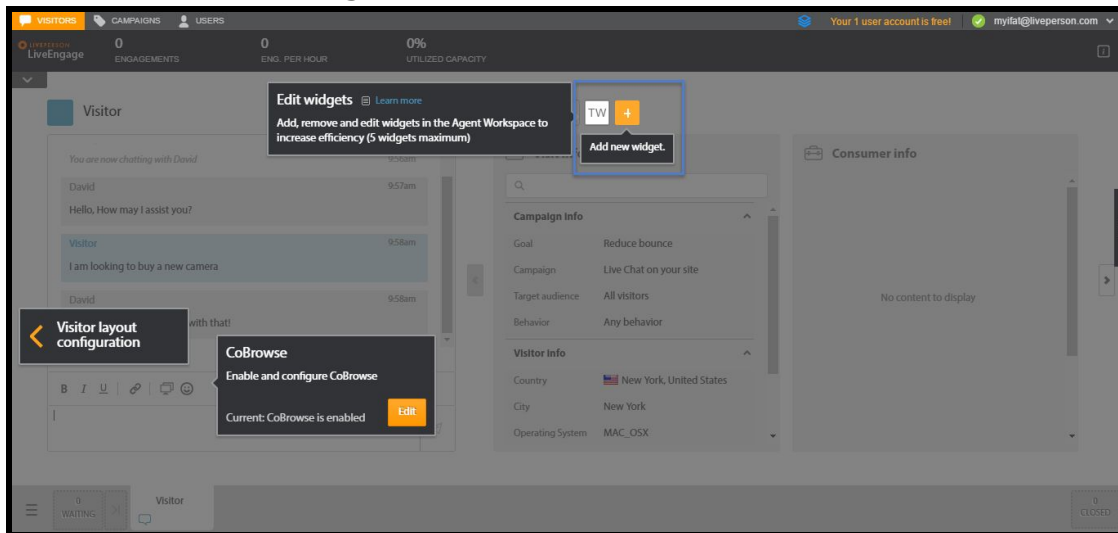
1. Access "Night Vision" settings menu: click on the icon on the top right of your screen as shown in the screenshot below:



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 “Zendesk” to have “ZE” 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 ZENDESK.

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

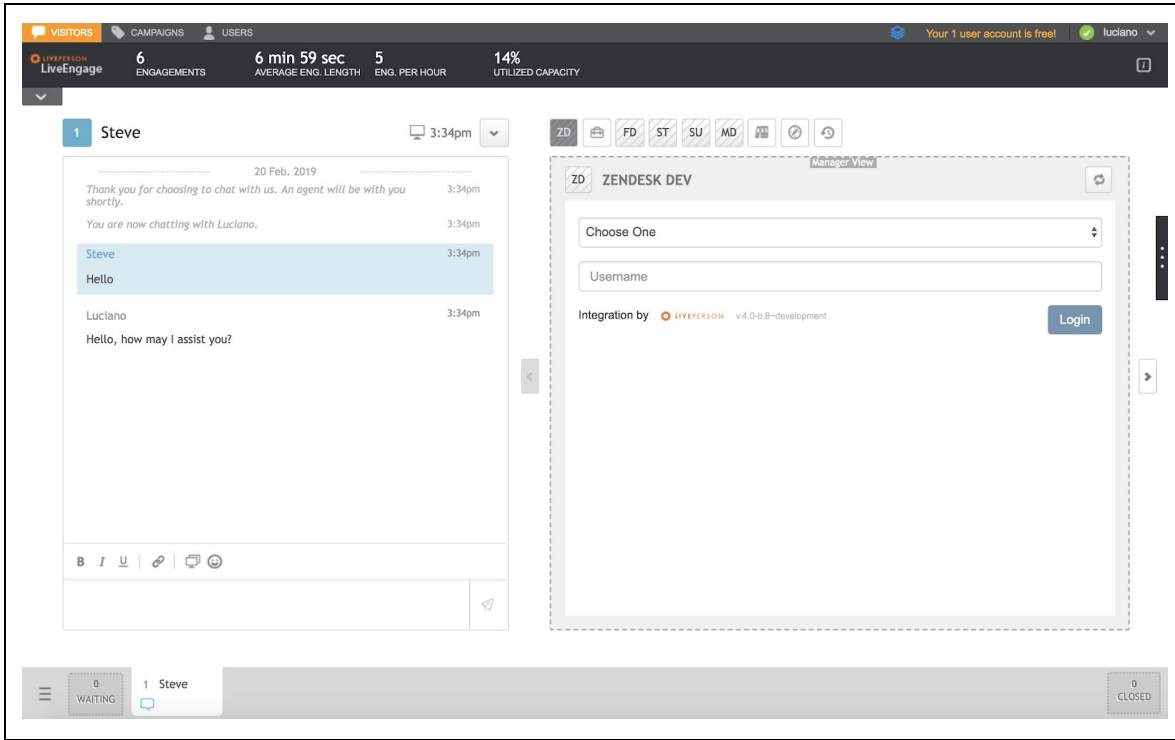
Overview

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

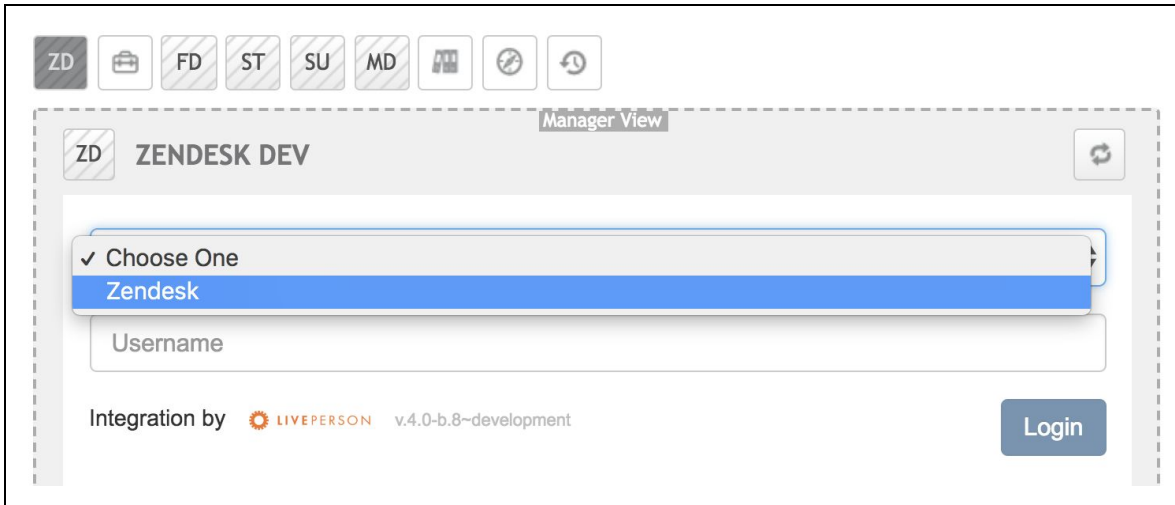
To start working on the new widget, accept a chat, click on "Zendesk" widget, login and you can view and create accounts and tickets directly in LiveEngage.



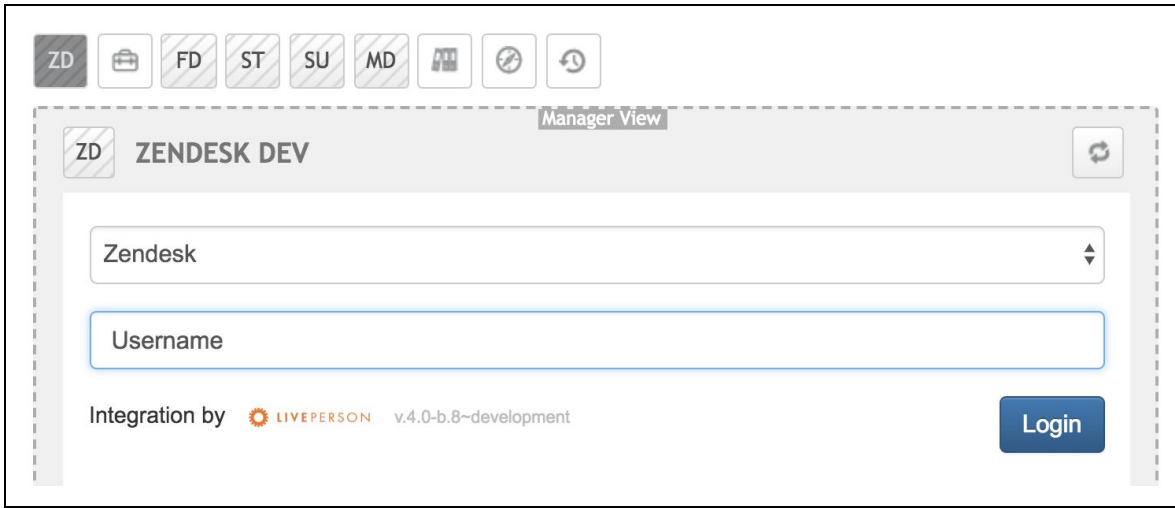
Login Widget

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

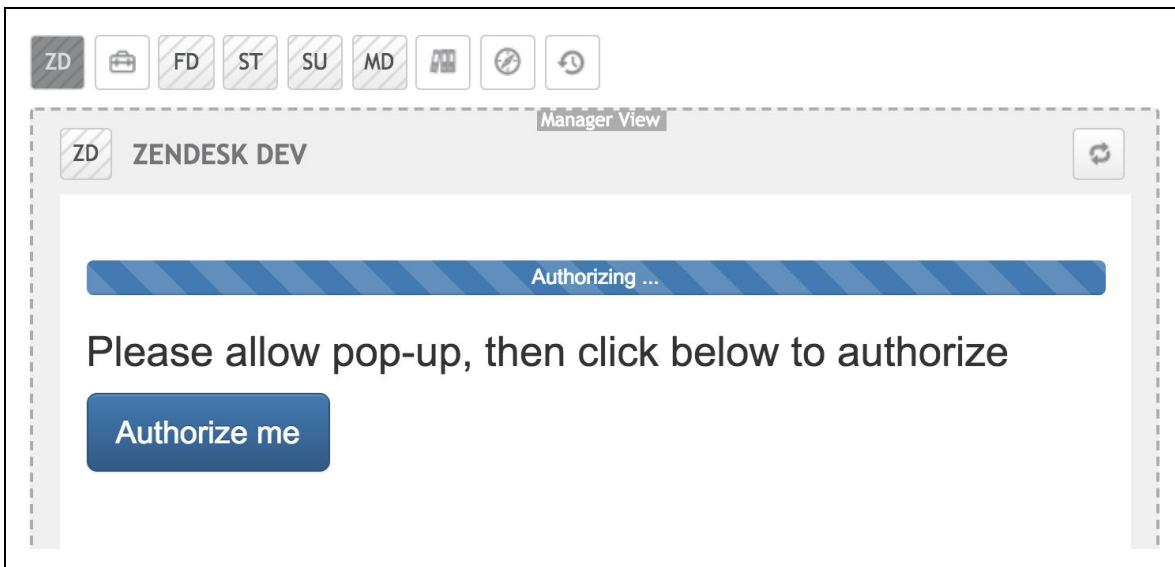
Select registered CRM:



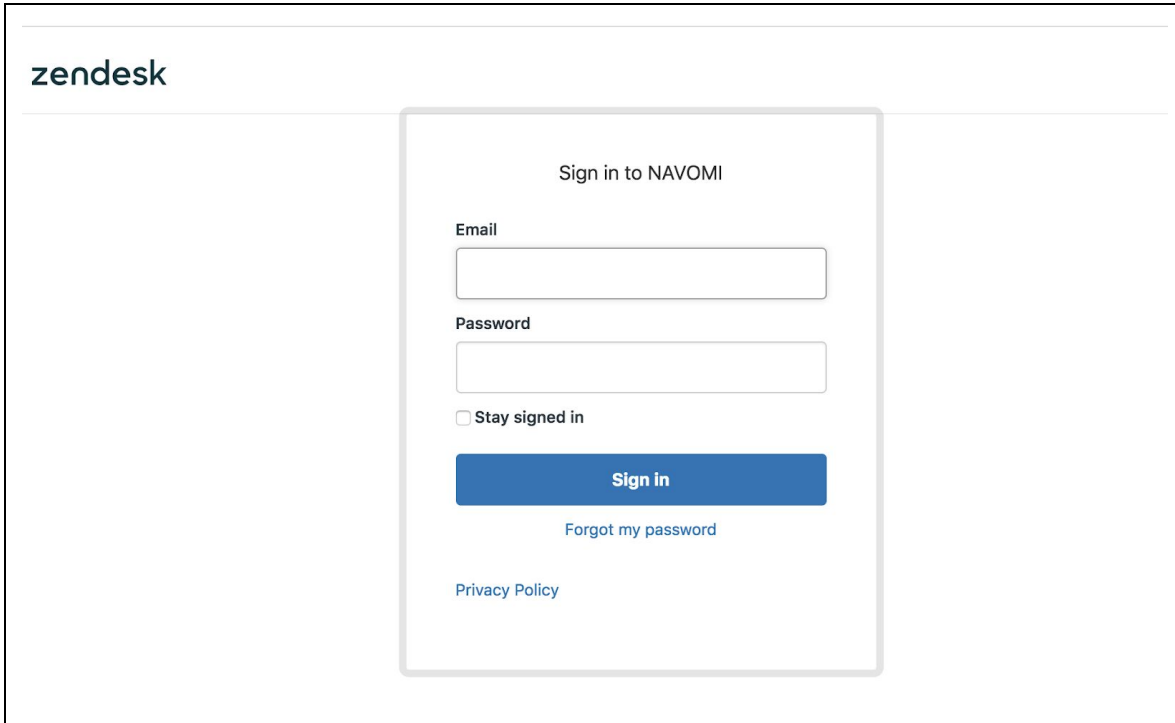
Enter your credentials (Username and Password) and click on "Login" button:



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



zendesk

Sign in to NAVOMI

Email

Password

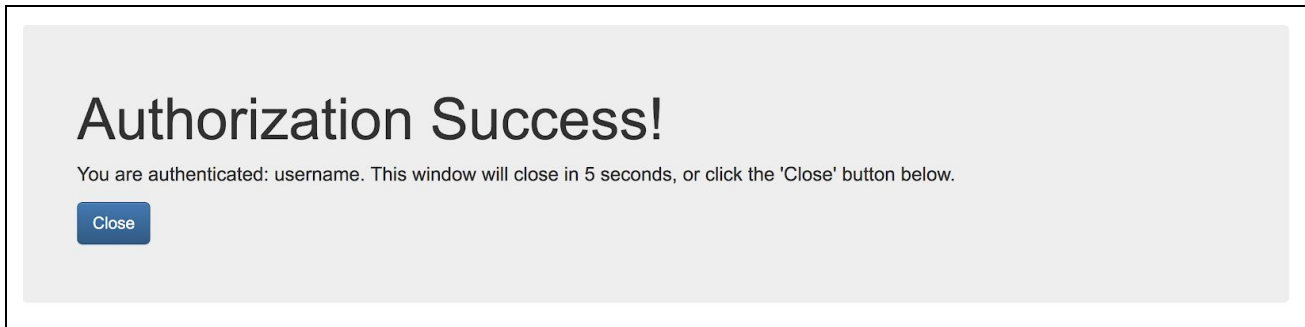
Stay signed in

Sign in

[Forgot my password](#)

[Privacy Policy](#)

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

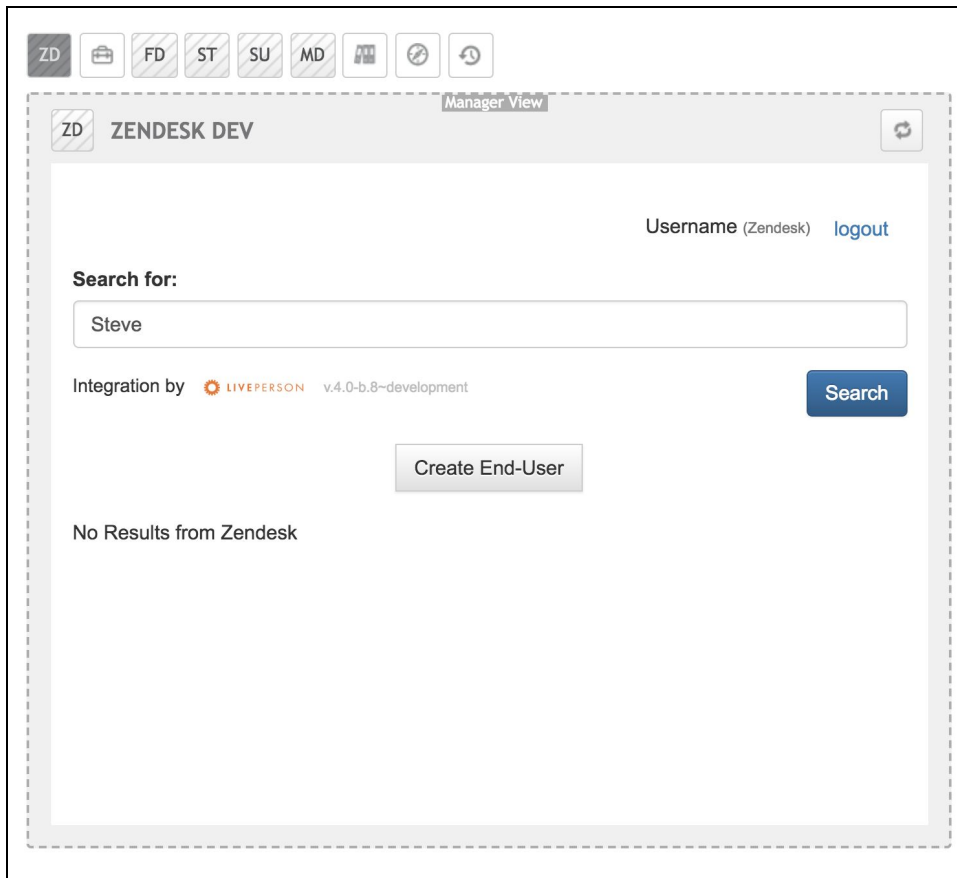


If the message has some type of error, follow these procedures:

- 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:



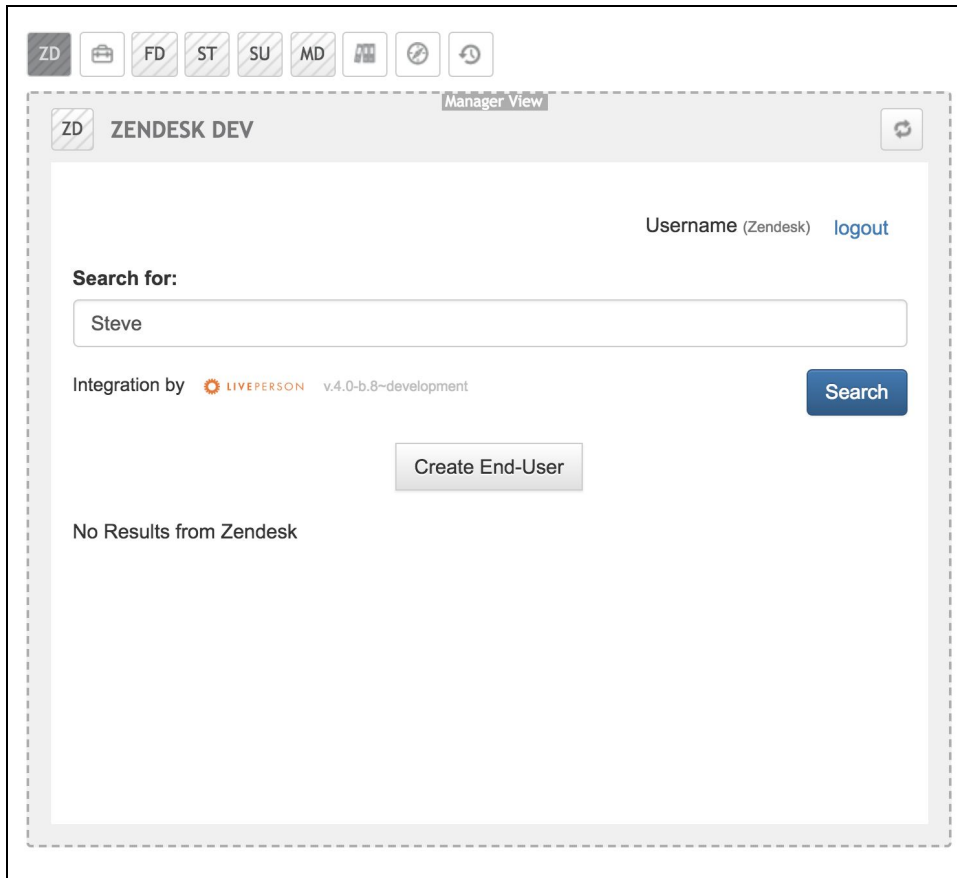
Custom Functionalities

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.

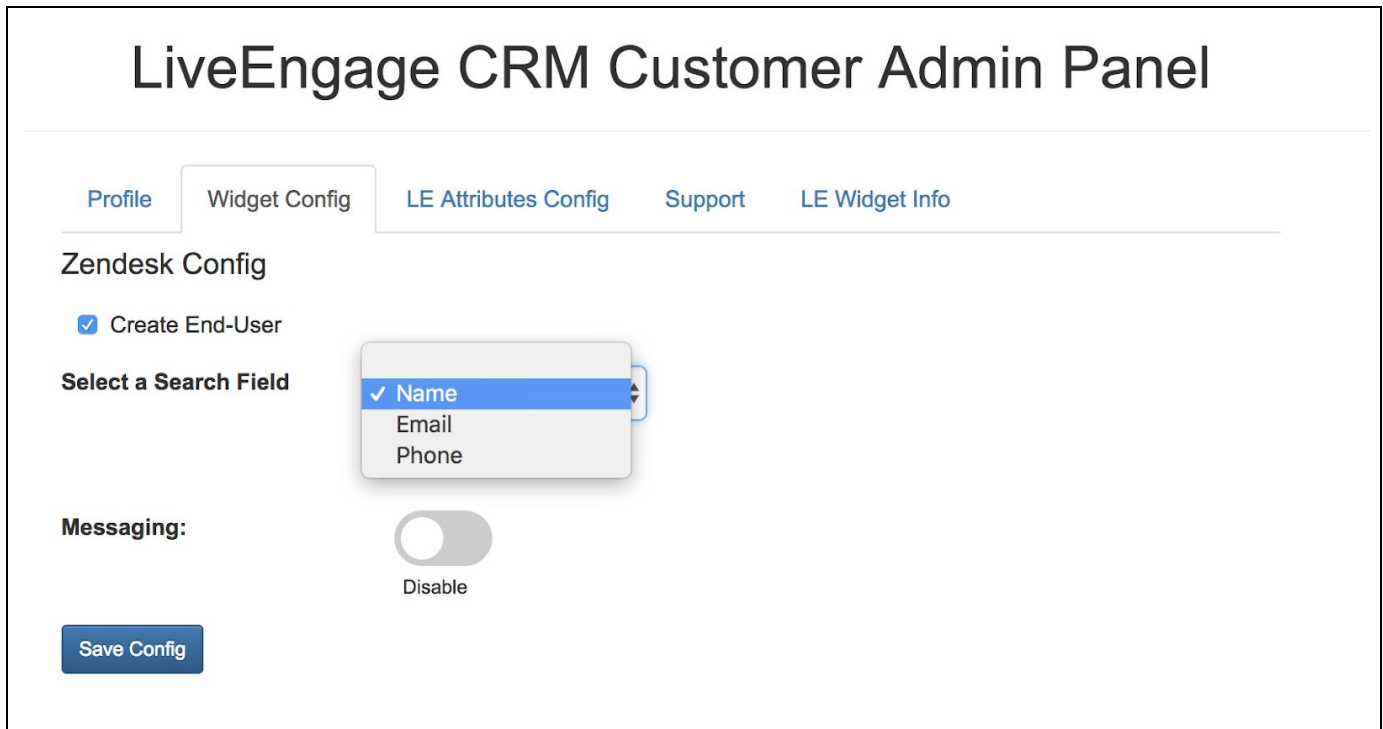
Search Records Filter/Fields

For Zendesk there are options to filter searches by:

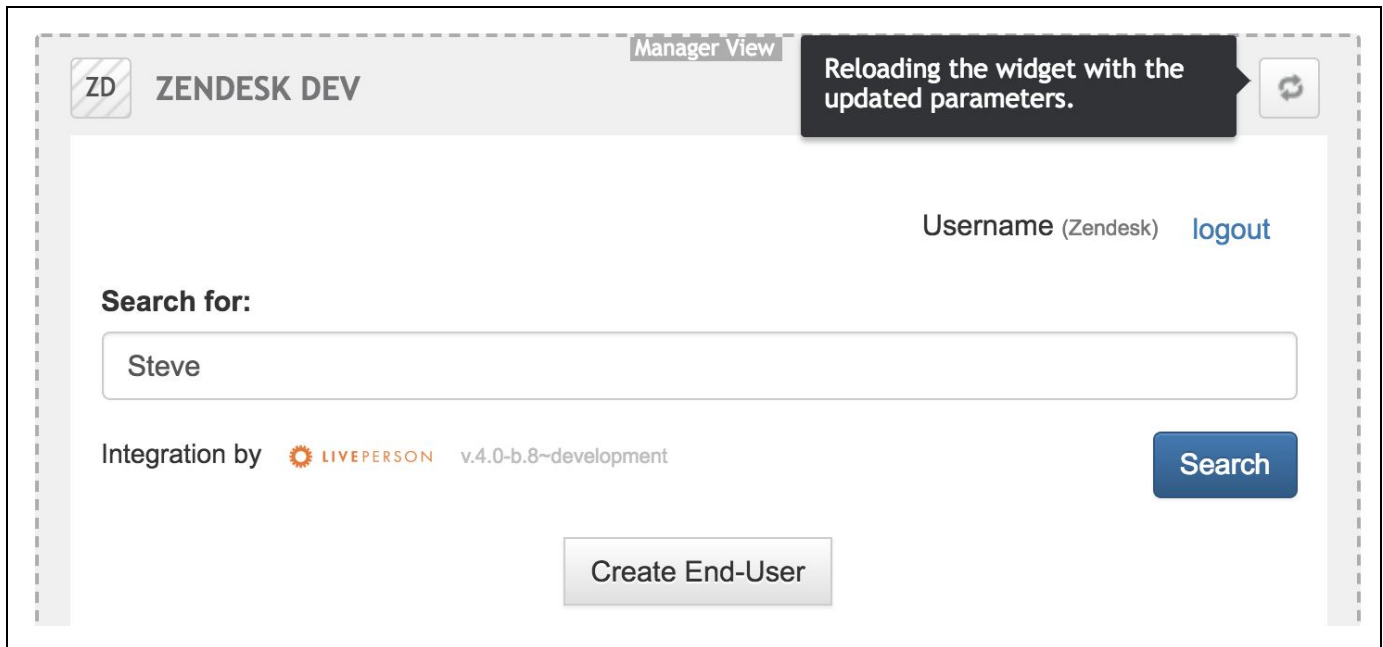
- Name
- Email
- Phone

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.

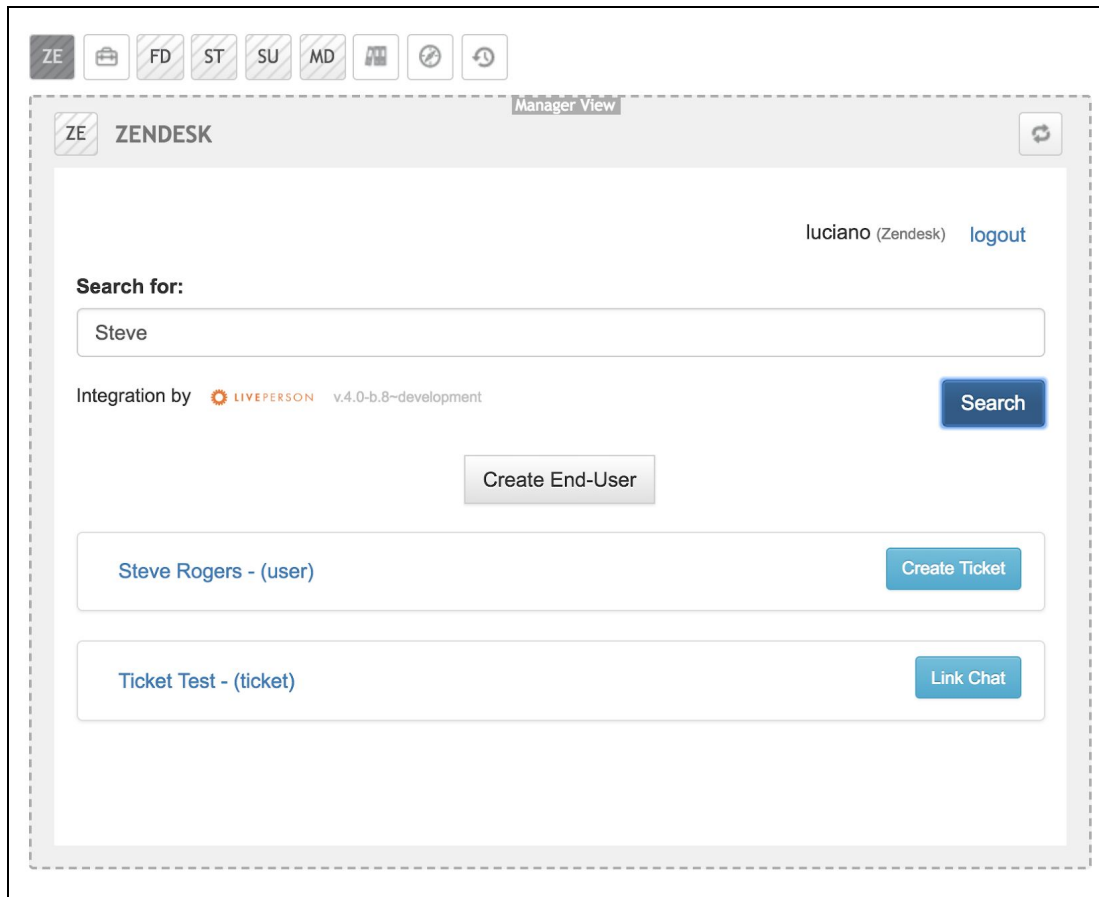


For new settings to take effect, you need to reload the widget in Live Engage. To do this, just click on the icon at the top of the widget on the right:

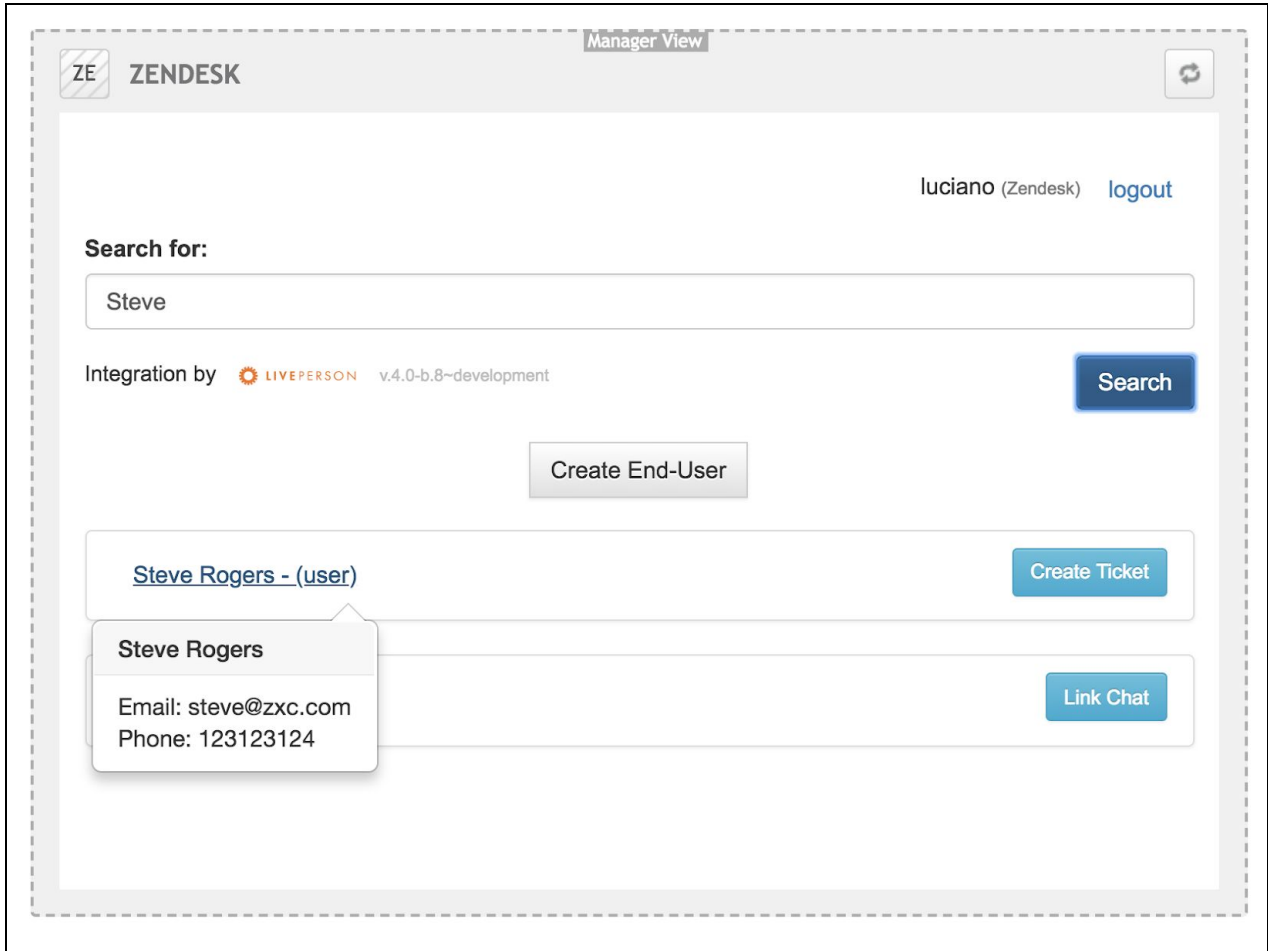


View Records

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:

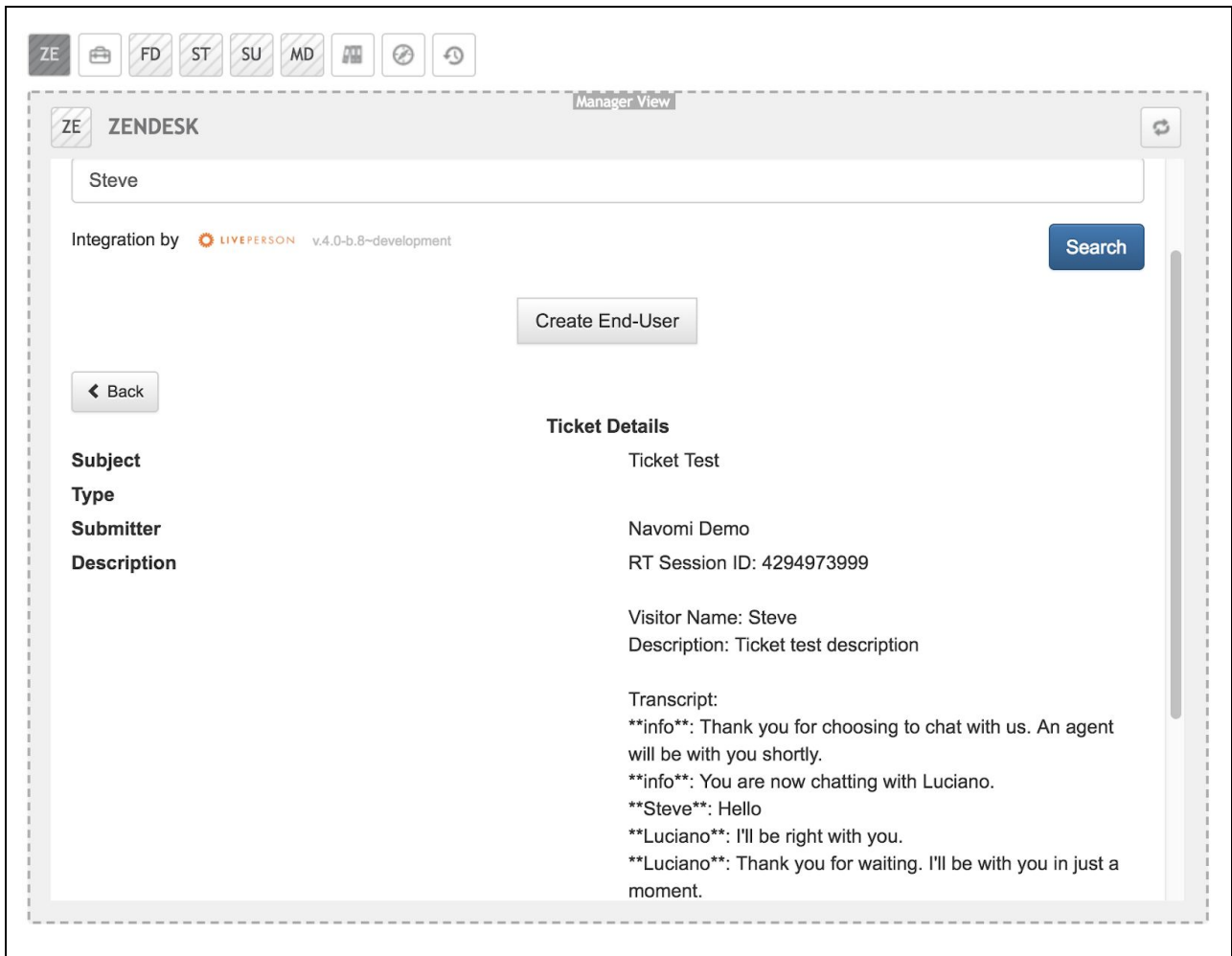


Clicking will display the item details. Here is an example of USER:

The screenshot displays the 'Manager View' interface for the Zendesk integration. At the top left, there is a 'ZE ZENDESK' logo and a 'Manager View' label. In the top right corner, the user 'luciano (Zendesk)' is logged in, with a 'logout' link. Below the header, there is a search section with the text 'Search for:' and an input field containing 'Steve'. To the right of the input field is a blue 'Search' button. Below the search field, it says 'Integration by LIVEPERSON v.4.0-b.8~development'. A 'Create End-User' button is centered below the search area. On the left side, there is a 'Back' button. On the right side, under the heading 'User Details', the following information is displayed:

Name	Steve Rogers
Email	steve@zxc.com
Phone	123123124

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:

The screenshot displays the Zendesk Manager View interface. At the top, there is a navigation bar with icons for various actions: ZE, FD, ST, SU, MD, and a refresh icon. Below this, the main content area is titled 'ZENDESK' and 'Manager View'. A search bar contains the name 'Steve'. Below the search bar, it indicates 'Integration by LIVEPERSON v.4.0-b.8-development' and a 'Search' button. A 'Create End-User' button is also visible. On the left side, there is a 'Back' button. The main content area is divided into two columns. The left column lists fields: Subject, Type, Submitter, and Description. The right column displays the corresponding ticket details: Ticket Test, Navomi Demo, RT Session ID: 4294973999, Visitor Name: Steve, and Description: Ticket test description. Below these details is a 'Transcript' section containing a chat log with messages from an info user, Steve, and Luciano.

When click on "Link Chat" to a ticket:

The screenshot shows a single ticket card. The card has a light gray background and a rounded border. On the left side, the text 'Ticket Test - (ticket)' is displayed in a blue font. On the right side, there is a blue button with the text 'Link Chat' in white.

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

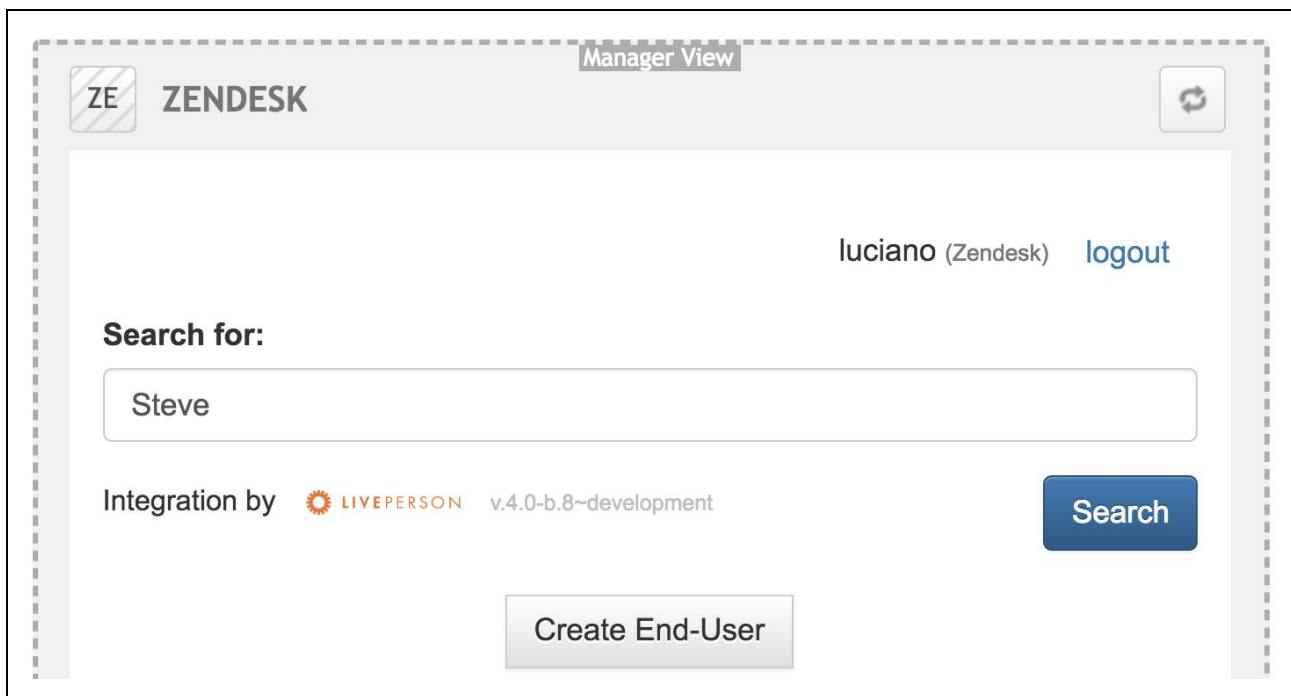
Transcript:
info: Thank you for choosing to chat with us. An agent will be with you shortly.
info: You are now chatting with Luciano.
Steve: Hello
Luciano: I'll be right with you.
Luciano: I'm sorry for the delay. I'll be right with you.
Luciano: Thank you for waiting. I'll be with you in just a moment.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

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

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.

Create End-User

Quick Create End-User

First Name *	<input type="text" value="Steve"/>
Last Name *	<input type="text" value="Rogers"/>
Email *	<input type="text" value="steve@zxc.com"/>
Phone *	<input type="text" value="123123124"/>

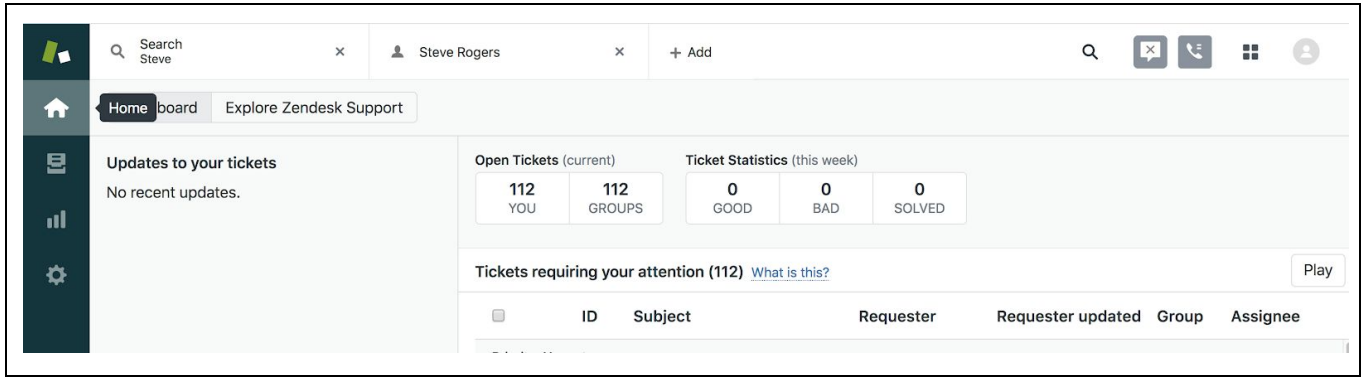
Cancel **Create**

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

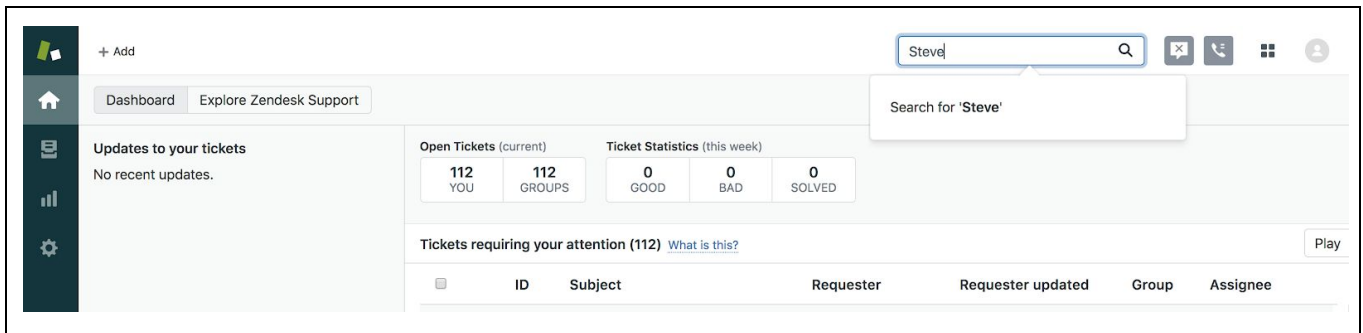
End-User successfully created

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

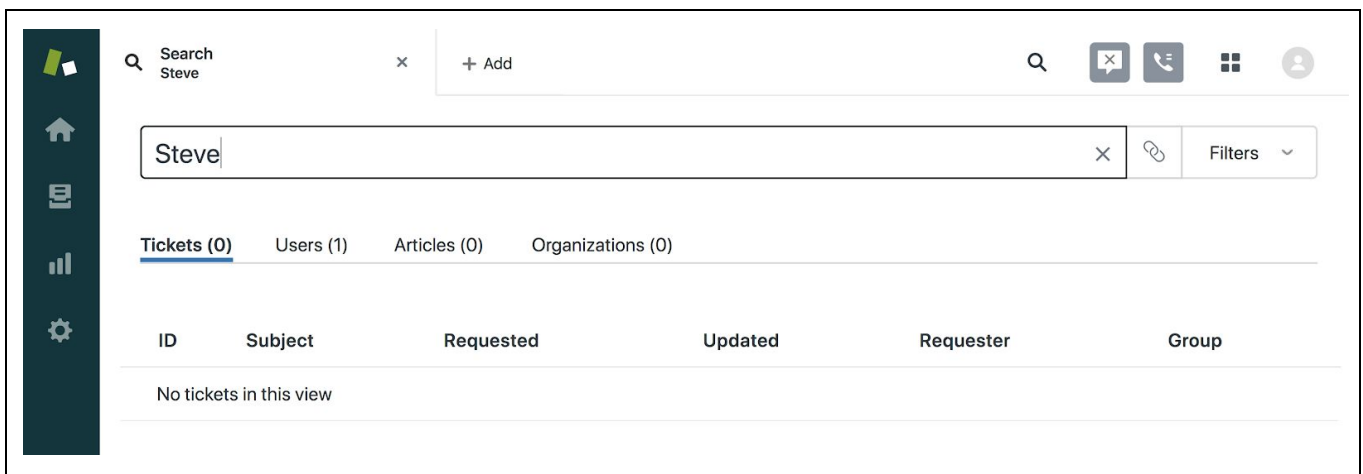
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In Home, click on  to do a search, insert the value to be searched and press "Enter":



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



Click on "Users" to show the users records:

The screenshot shows a search interface with a search bar containing 'Steve'. Below the search bar, there are tabs for 'Tickets (0)', 'Users (1)', 'Articles (0)', and 'Organizations (0)'. The 'Users (1)' tab is selected, displaying a table with one user record.

Name	Email	Organization	Role	Updated
Steve Rogers	steve@zxc.com	-	End-user	2 minutes ago

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

The screenshot shows the detailed user profile for 'Steve Rogers'. The profile includes a sidebar with various fields and a main content area with a 'New Ticket' button and a 'Requested tickets' section.

Role: End-user
Access: Can view and edit own ticke...
Primary email: steve@zxc.com
Phone: 123123124 (direct line)
Tags: -
Org.: -
Details: -
Notes: -

Created 4 minutes ago
Updated 3 minutes ago
Last sign-in

Steve Rogers + New Ticket

Tickets (0) Security Settings

Requested tickets (0)

ID	Subject	Requested	Updated	Group	Assignee
No tickets in this view					



Create Ticket

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

Additional Info: Steve Rogers

Subject*

Status*

Priority*

Agent Group

Description*

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

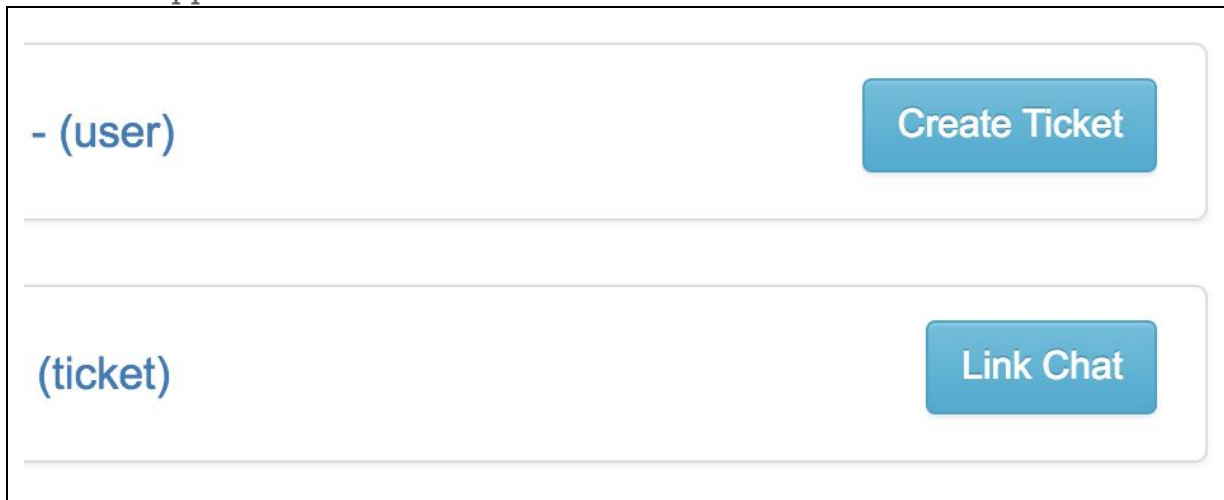
Create Ticket Succeeded

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

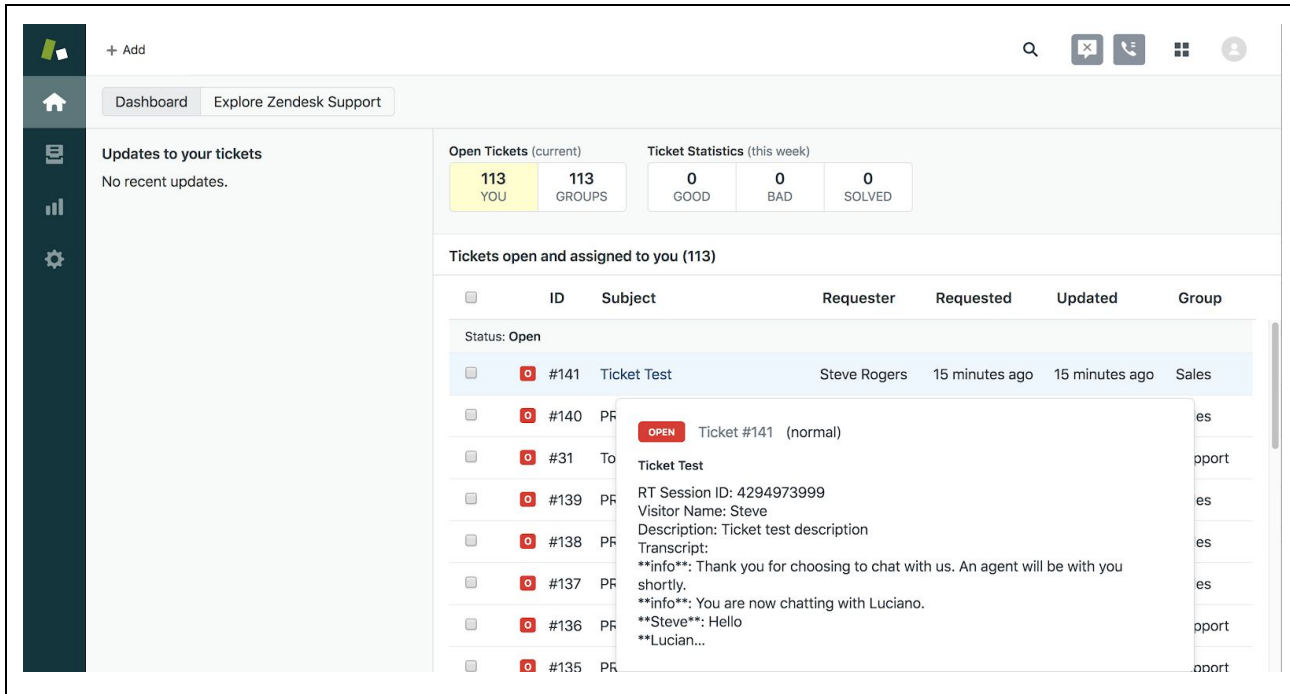
Disabled buttons appearance:



Enabled buttons appearance:

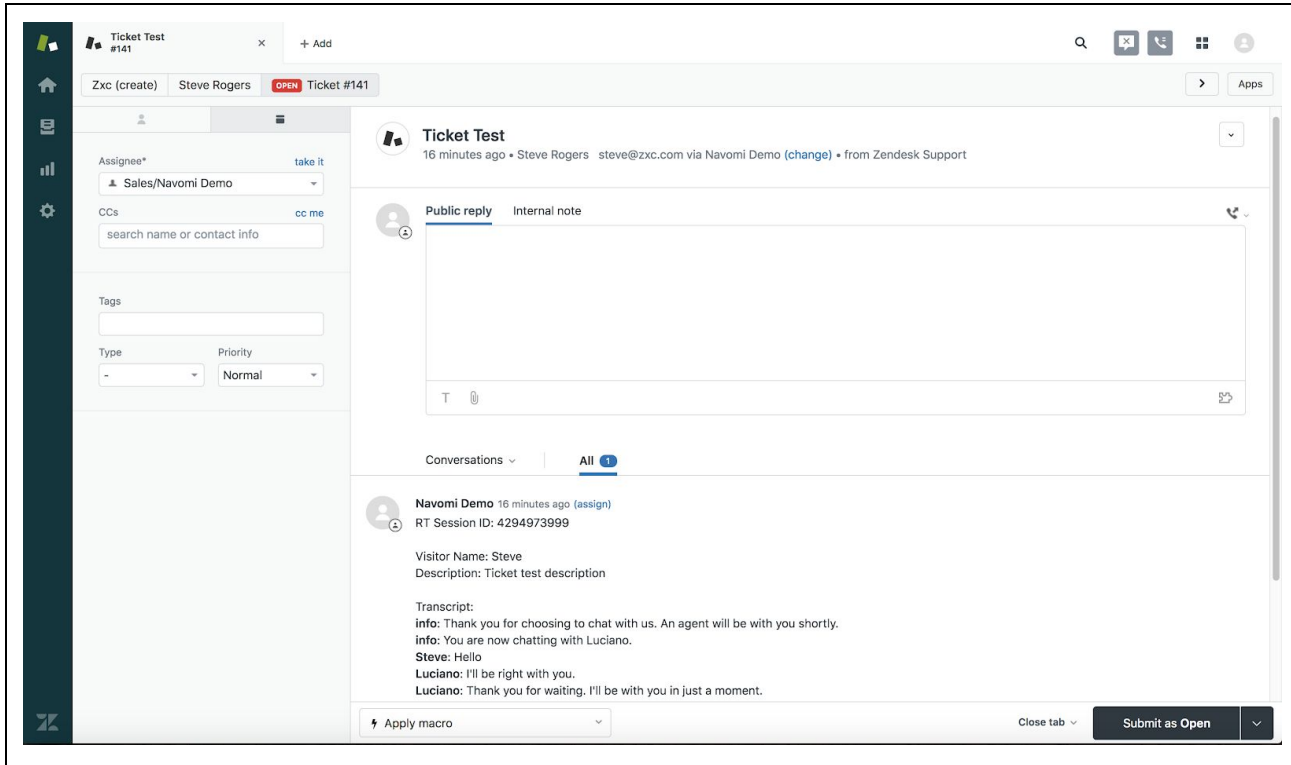


Note where this record will be stored in CRM system itself. You can see and access it in Dashboard:



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





Link Chat Transcripts to Entity

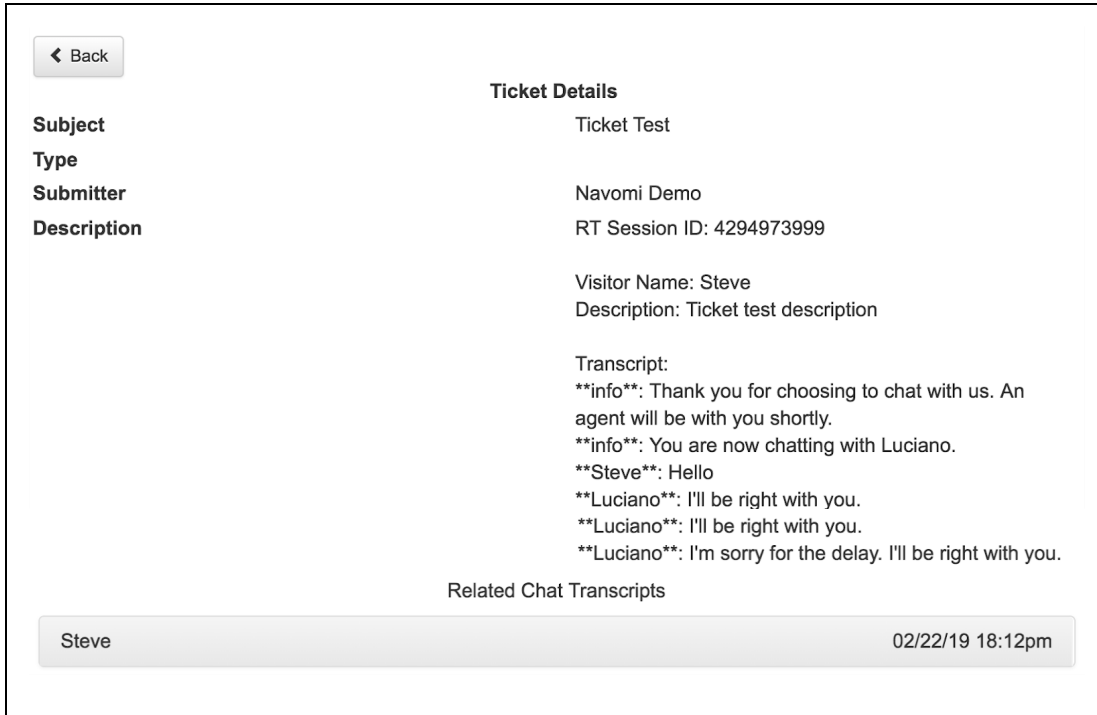
In case the chat is related to an existing Ticket, or User, you can link the chat to that relevant record in Zendesk.

- 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.



The screenshot displays a ticket details page. At the top left is a 'Back' button. The 'Ticket Details' section includes fields for Subject (Ticket Test), Type, Submitter (Navomi Demo), and Description (RT Session ID: 4294973999). Below this, visitor information is shown: Visitor Name: Steve and Description: Ticket test description. A transcript section follows, containing a series of messages: an info message about chat availability, another info message identifying the agent as Luciano, a message from Steve saying 'Hello', and two responses from Luciano saying 'I'll be right with you.' and 'I'm sorry for the delay. I'll be right with you.' Below the transcript is a section for 'Related Chat Transcripts' with a single entry for 'Steve' dated '02/22/19 18:12pm'.

- 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.

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:

The screenshot shows the Zendesk dashboard interface. On the left is a navigation sidebar with icons for home, updates, analytics, and settings. The main content area is divided into several sections:

- Dashboard:** Includes a search bar and navigation tabs for "Dashboard" and "Explore Zendesk Support".
- Updates to your tickets:** Shows "No recent updates."
- Open Tickets (current):** A summary card showing 113 tickets for "YOU" and 113 for "GROUPS".
- Ticket Statistics (this week):** A summary card showing 0 GOOD, 0 BAD, and 0 SOLVED tickets.
- Tickets open and assigned to you (113):** A table listing tickets with columns for ID, Subject, Requester, Requested, Updated, and Group.

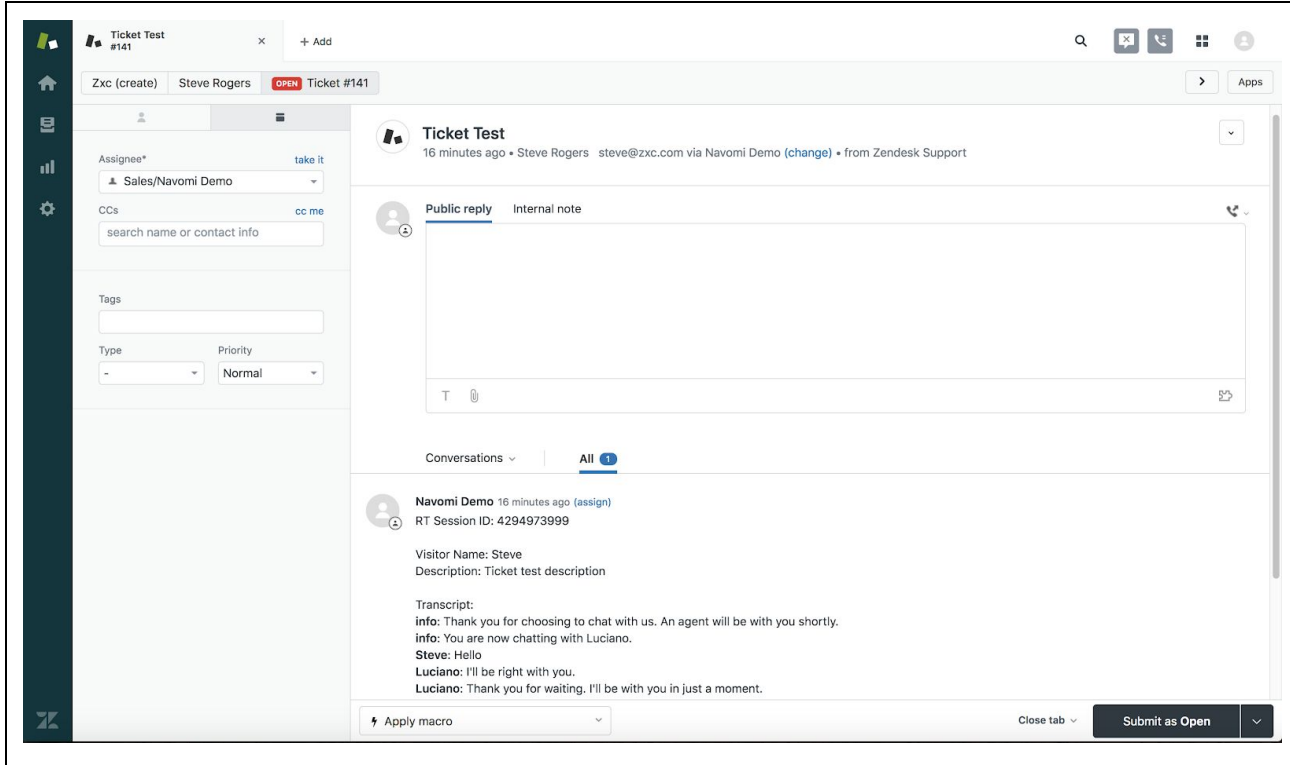
The table lists several tickets, with ticket #141 selected. A detailed view for ticket #141 is shown, including:

- Status: Open
- ID: #141
- Subject: Ticket Test
- Requester: Steve Rogers
- Requested: 15 minutes ago
- Updated: 15 minutes ago
- Group: Sales
- Transcript: 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 **Lucian...

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




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




Conversations ▾ | All **2**

 **Navomi Demo** Feb 22 17:12 (assign)
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.

 **Navomi Demo** Feb 22 14:59 (assign)
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: 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.
Luciano: I'll be right with you.
Luciano: Thank you for waiting. I'll be with you in just a moment.

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.

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