

MS DYNAMICS Integration Guide

LiveEngage CRM Widget

by LivePerson, INC

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Version Management

Date	Version	Owner	Change History
5/23/2017	1.0	Jason Kadarusman	Document Creation
5/26/2017	1.1	Estefania Londono	Update Documentation
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.
06/04/2019	1.6	Luciano Buhler	Updated the Azure configuration.

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 Microsoft Dynamics Widget. The LiveEngage MS Dynamics Widget will allow viewing MS Dynamics 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

Set Up Guide

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

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 MS Dynamics.

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

Sign Up

Company Name

LiveEngage Admin First Name LiveEngage Admin Last Name

LiveEngage Admin Email LiveEngage Account Number

Choose Region

Number of Agents

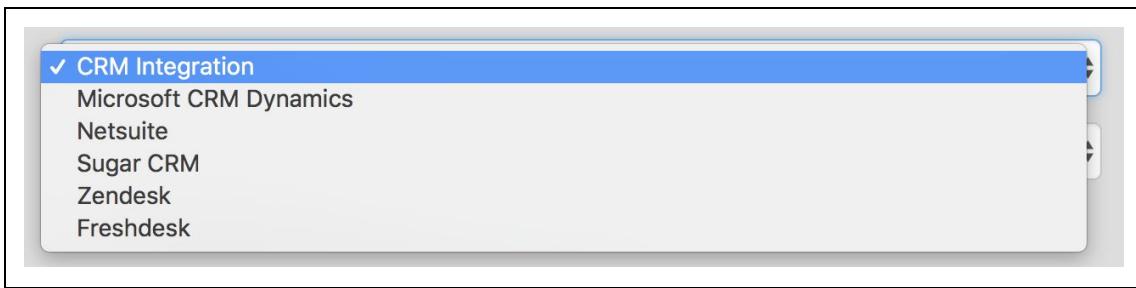
CRM Integration

Additional CRM Integration?

By checking this box, you agree to our [terms of use](#) *

Sign Up

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

The screenshot shows the 'Customer's Accounts' section of the Admin Panel. At the top, there is a navigation bar with the LIVEPERSON logo, 'Customer's Accounts' selected, and links for 'Agents', 'Usage', 'Settings', and 'Logout (lb_dynamics)'. Below the navigation is a title 'LiveEngage CRM Customer Admin Panel'. Underneath is a search bar with icons for file, search, and close. To the right of the search bar are buttons for 'Size (10)' and '1 Result(s)'. A table below the search bar displays one result: 'Customer Key' (NAVO-00000000-DYNAMICS), 'CRM Label' (Microsoft Dynamics), 'CRM' (Microsoft CRM Dynamics), and 'Created Date' (05/08/2017). Each row has an 'info' icon in the first column.

Customer Key	CRM Label	CRM	Created Date
NAVO-00000000-DYNAMICS	Microsoft Dynamics	Microsoft CRM Dynamics	05/08/2017

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

License Info

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

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

LiveEngage CRM Customer Admin Panel

[◀ Back](#)

License Info

Customer Key	NAVO-00000000-DYNAMICS
CRM Type	Microsoft CRM Dynamics
CRM Label	Edit Microsoft Dynamics
Service Root URL	Edit https://<YOUR_CRM_SUBDOMAIN>.dynamics.com
Use Plasma	Edit <input type="checkbox"/>
Client ID	Hide Edit <YOUR_CLIENT_ID>
Client Secret	Hide Edit YOUT_CLIENT_SECRET>
Created At	05/09/2017

Agents (Deprecated)

Link: Admin Panel → Agents

This session will not be addressed as it is deprecated

The screenshot shows the top navigation bar with the LIVEPERSON logo, Customer's Accounts, Agents (selected), Usage, Settings, and Logout (lb_zendesk). Below the navigation is the title "LiveEngage CRM Customer Admin Panel". Underneath is a search bar with "New Agents" button, "Username" input field, and "CRM" dropdown.

Usage

Link: Admin Panel → Usage

See the follow usage statistics from the account:

The screenshot shows the 'LiveEngage CRM Customer Admin Panel' with the 'Usage' tab selected. Below it, the 'Login Usage' tab is active. The main content area displays a table titled 'Per Agent Login Count' with the following data:

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

At the top right of the table, there are buttons for 'Size (10) ▾' and '2 Result(s)'. At the bottom right of the table, there are buttons for 'Print' (P), 'Search' (Q), and 'Delete' (X).

Login Usage

See the login statistics from each Agent by:

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

The screenshot shows the 'LiveEngage CRM Customer Admin Panel' with the 'Usage' tab selected. Below it, the 'Agent Usage' tab is active. The main content area displays a table titled 'Per Agent Login Count' with the following data:

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

At the top right of the table, there are buttons for 'Size (10) ▾' and '2 Result(s)'. At the bottom right of the table, there are buttons for 'Print' (P), 'Search' (Q), and 'Delete' (X).

Agent Usage

See the login statistics from all Agents by:

- Last 7 Days
- Currently Month
- Previous Month

- Total Logins

LiveEngage CRM Customer Admin Panel

Login Usage Agent Usage Search Usage Link Chat Usage

Total Agent Logins

Last 7 Days Usage Current Month Usage Previous Month Usage Total Logins

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

Size (10) ▾ 1 Result(s)

Search Usage:

See the search 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

Search Count

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

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

Size (10) ▾ 1 Result(s)

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.

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

Widget Config

Link: Admin Panel → Settings → Widget Config

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

LiveEngage CRM Customer Admin Panel

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

Dynamics Config

Create Account
 Auto Link Chat(Account)

Create Case (only for Account and Contacts) - beta

Create Contact
 Auto Link Chat(Contact)

Create Lead
 Auto Link Chat(Lead)
 Skip Info Prompt

Auto Create Lead
 Exclude Chat Transcript (only Chat Session ID will be mentioned)

Disable Search

Select a Search Field Name 
Widget will use Name field to search records.

Add Custom Survey Questions 

Save 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 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: (i)

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.

LiveEngage CRM Customer Admin Panel

Profile

Widget Config

LE Attributes Config

Support

LE Widget Info

Support Info

For support on the CRM Widget please do one of the following:

Email Support:

crm-widget-support@lp.com

Open Support Ticket:

<https://support.lp.com>

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-DYNAMICS>

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.
- Service Root URL: [Service Root URL from Dynamics Developer Resources](#) (Point "3")
 - EX: https://<your_subdomain>.api.crm.dynamics.com
- Use Plasma: Only to use Microsoft Plasma instances.
- Client ID: [Application ID value from Azure Active Directory setup](#) (Point "4")
- Client Secret: [Client Secret value from Azure Active Directory setup](#) (Point "3")

LiveEngage CRM Customer Admin Panel

[◀ Back](#)

License Info

Customer Key	NAVO-00000000-DYNAMICS
CRM Type	Microsoft CRM Dynamics
CRM Label	Edit Microsoft Dynamics
Service Root URL	Edit https://<YOUR_CRM_SUBDOMAIN>.dynamics.com
Use Plasma	Edit <input type="checkbox"/>
Client ID	Hide Edit <YOUR_CLIENT_ID>
Client Secret	Hide Edit YOUT_CLIENT_SECRET>
Created At	05/09/2017

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

Dynamics Config

Create Account
 Auto Link Chat(Account)

Create Case (only for Account and Contacts) - beta

Create Contact
 Auto Link Chat(Contact)

Create Lead
 Auto Link Chat(Lead)
 Skip Info Prompt

Auto Create Lead
 Exclude Chat Transcript (only Chat Session ID will be mentioned)

Disable Search

Select a Search Field
Widget will use Name field to search records.

Add Custom Survey Questions

- Enabling/disabling entities that can be created within MS Dynamics:
 - Create Account
 - Create Case
 - Create Contact
 - Create Lead
- Enabling/disabling how chat transcript are to be linked/created within the Notes section enabled entities.
 - Auto Link Chat (Account)
 - Auto Link Chat (Contact)
 - Auto Link Chat (Lead)
 - Skip Info Prompt
 - Exclude Chat Transcript (only Chat Session ID will be mentioned)



- Auto Create Lead
- Enabling/disabling Search
- Select a Search Field:
 - Name
 - Email
 - Phone
- Add Custom Survey Questions

This provides the ability to add custom pre-chat survey questions. If the LiveEngage pre-chat survey contains custom questions and needs an answer to map over to the widget form, please add those questions here.

Standard pre-chat survey questions are Name, Email, and Phone. Others are custom questions.

Example:

Survey Question: What is your company name?(This is the same as the pre-chat survey question in the LiveEngage)

Question Field: Company (This is the widget form field)

Configure CRM

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

Azure Active Directory

For the CRM Widget to gain access to Microsoft Dynamics, an Azure Active Directory is required as part of the setup. Azure Active Directory allows for seamless OAuth v2.0 integration, so that profile level permissions could be applied, and a trusted third-party application (CRM Widget) is registered to access the necessary components of Microsoft Dynamics.

App Registration

1. Login into Azure Portal.

2. Go to Microsoft Azure Menu -> Azure Active Directory -> App Registrations -> New Application Registration:

The screenshot shows the Microsoft Azure portal interface. The left sidebar has a dark theme with various service icons and a 'Create a resource' button. Under 'FAVORITES', 'Azure Active Directory' is listed. The main content area is titled 'NAVOMI INC - App registrations' under 'Azure Active Directory'. It features a search bar, a 'New application registration' button, and tabs for 'Endpoints' and 'Troubleshoot'. A purple banner at the top right says 'The preview experience for App registrations is available. Click this banner to launch the preview experience.' Below this, there's a search bar, a dropdown for 'My apps', and a table header with columns 'DISPLAY NAME', 'APPLICATION TYPE', and 'APPLICATION ID'. A message states 'You're not the owner of any applications in this directory.' At the bottom right is a blue 'View all applications' button.

3. Complete the App form and click "Create". You will need the following information:
- Name = <YOUR_CLIENT_NAME>
 - Example: [le_crmwidget]
 - Redirect URI = Web
 - Select this value.
 - Redirect URI = <https://lpcrm.fs.liveperson.com/oauth2>
 - Copy and paste this value.
 - Click on the Register button

Register an application

*** Name**
The user-facing display name for this application (this can be changed later).
 ✓

Supported account types
Who can use this application or access this API?
 Accounts in this organizational directory only (NAVOMI INC)
 Accounts in any organizational directory
 Accounts in any organizational directory and personal Microsoft accounts (e.g. Skype, Xbox, Outlook.com)
[Help me choose...](#)

Redirect URI (optional)
We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.
 ▾ ✓

[By proceeding, you agree to the Microsoft Platform Policies](#) 

Register

4. After you enter the above info, an entry will be created. In this example it is "CRMWIDGET_2019". Click on "Overview" and copy the "**Application ID**", you will need this later in the setup:



The screenshot shows the Microsoft Azure App Registrations portal. On the left, a sidebar lists various management options like Overview, Quickstart, Manage, Support + Troubleshooting, and Troubleshooting. The 'Overview' option is currently selected and highlighted with a blue box. A red arrow points from the 'API permissions' link in the sidebar to the 'Application (client) ID' field on the main page. The 'Application (client) ID' field is also highlighted with a blue box, and a 'Copy to clipboard' button is positioned to its right. Other fields shown include 'Display name' (crmwidget_2019), 'Directory (tenant) ID', and 'Object ID'. To the right, there's a section titled 'Supported account types' with 'My organization only' selected, and a note about 'Managed application in local directory'.

Permissions

1. Click on "API permissions" and click on "Add a permission" button, then select "Dynamics CRM".
2. Select "Delegated Permissions" and "user_impersonation". Click on "Add permissions"

The screenshot shows the 'API permissions' section of the Microsoft Dynamics CRM API configuration interface. On the left, a sidebar lists various management options like Overview, Quickstart, Manage, API permissions (which is selected and highlighted in blue), and Support + Troubleshooting. The main content area starts with a question 'What type of permissions does your application require?' It offers two choices: 'Delegated permissions' (selected) and 'Application permissions'. Under 'Delegated permissions', it says 'Your application needs to access the API as the signed-in user.' Below this, there's a search bar labeled 'Type to search' and a table titled 'PERMISSION' with a single row. This row contains a checkbox labeled 'user_impersonation' which is checked, followed by the description 'Access Common Data Service as organization users'. A note 'ADMIN CONSENT REQUIRED' is to the right of this row. At the bottom of the main content area are two buttons: 'Add permissions' (highlighted with a red box) and 'Discard'.

Client Secret

1. Click on "Certificates & Secrets Button" and "New client secret":

crmwidget_2019 - Certificates & secrets

Overview
Quickstart

Manage
Branding
Authentication

Certificates & secrets
API permissions
Expose an API

Owners
Manifest

Support + Troubleshooting
Troubleshooting
New support request

Credentials enable applications to identify themselves to the authentication service when receiving tokens at a web addressable location (using an HTTPS scheme). For a higher level of assurance, we recommend using a certificate (instead of a client secret) as a credential.

Certificates

Certificates can be used as secrets to prove the application's identity when requesting a token. Also can be referred to as public keys.

THUMBPRINT	START DATE	EXPIRES
No certificates have been added for this application.		

Client secrets

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

DESCRIPTION	EXPIRES	VALUE
+ New client secret		

2. You will need the following information, then click on "Save":
 - a. Description = <YOUR_KEY_NAME>
 - i. Example: [CRM Widget]
 - b. Expires = Never
 - i. Select this value.
 - c. Click on "Add".

Add a client secret

Description

Expires

In 1 year

In 2 years

Never

[Add](#) [Cancel](#)

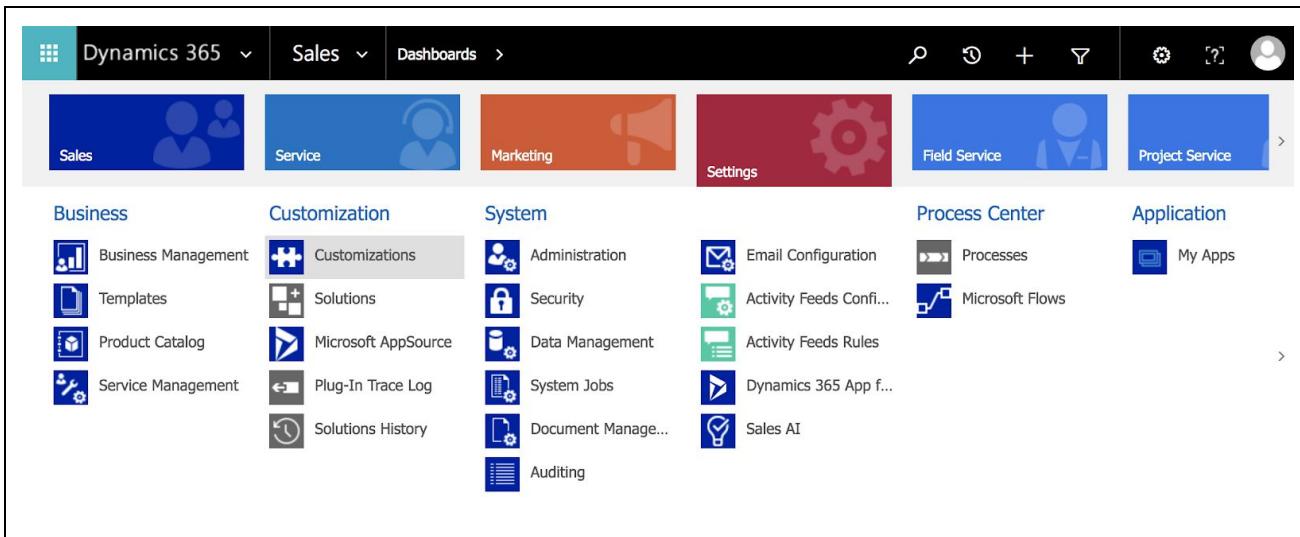
3. Copy the Value (this is the Client Secret) that it auto-generates, you will need this later in the setup:

The screenshot shows the 'Certificates & secrets' blade for the application 'crmwidget_2019'. The left sidebar lists various management options like Overview, Quickstart, Authentication, and Certificates & secrets (which is selected). The main content area has a note to copy the client secret value. It explains that credentials enable applications to identify themselves to the authentication service. Below this is a section for 'Certificates' which shows a table with no entries. Then there's a 'Client secrets' section with a table showing one entry for 'CRMWIDGET_2019' with an expiration date of 12/31/2299. A blue box highlights the 'VALUE' column for this entry, and a red box highlights the 'Copy to clipboard' button.

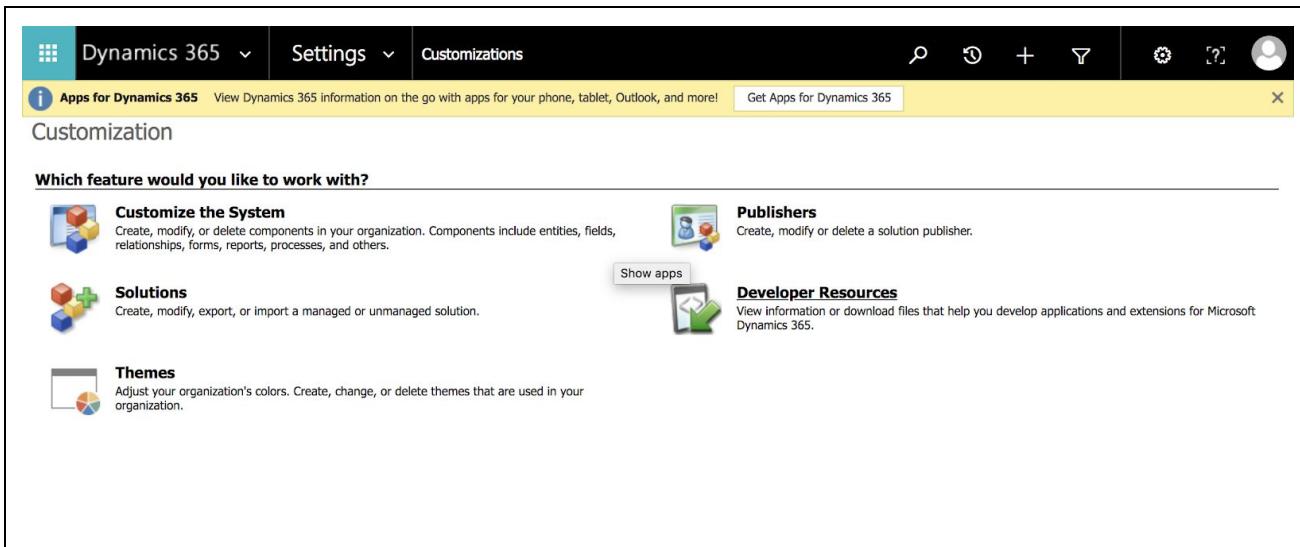
DESCRIPTION	EXPIRES	VALUE
CRMWIDGET_2019	12/31/2299	[Redacted]

Microsoft CRM Dynamics

1. Login to your Microsoft CRM Dynamics as an admin and click on Settings → Customizations on top menu:



2. Click on "Developer Resources":



3. Under the Instance Reference Information, copy the value within the field called Service Root URL. This value will be needed in the CRM Widget setup:

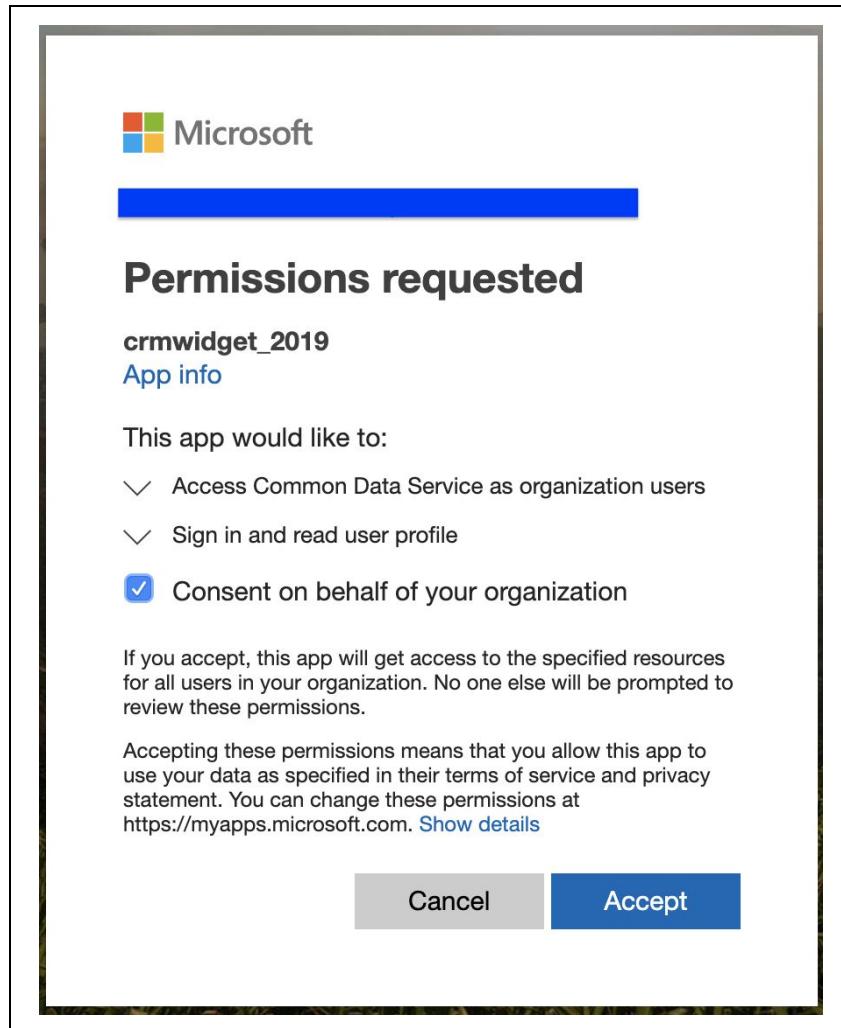
The screenshot shows the Dynamics 365 Developer Resources page. At the top, there's a navigation bar with 'Dynamics 365', 'Settings', 'Customizations', and various icons. Below the navigation is a yellow banner with the text 'Apps for Dynamics 365' and a link 'Get Apps for Dynamics 365'. The main content area is titled 'Developer Resources' and has a 'Getting Started' section with links to 'Developer Center', 'Developer Forums', 'SDK NuGet Packages', 'SDK Download', 'Sample Code', and 'Developer Overview'. Below this is a section titled 'Connect your apps to this instance of Dynamics 365'.

Instance Web API
HTTP REST API providing access to this instance of Dynamics 365. For more information see [Microsoft Dynamics 365 Web API](#).
Service Root URL: <https://api.crm.dynamics.com/api/data/v9.1/>

Organization Service
SOAP Service providing access to this instance of Dynamics 365. For more information see [Use the IOrganizationService web service to read and write data or metadata](#).
Endpoint Address: <https://api.crm.dynamics.com/Organization.svc>

Instance Reference Information
Use this information to uniquely identify this instance of Dynamics 365. You can use this to retrieve the current URL for this instance. For more information see [Azure extensions for Microsoft Dynamics 365](#).

After the configuration is done in the Admin-Panel and in the LE, when trying to access the LE after the CRM credentials have been entered, a request similar to this may appear:



Just Consent and Accept!

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:

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The screenshot shows the LivePerson Agent Workspace interface. At the top, there are navigation tabs: VISITORS, CAMPAIGNS, and USERS. Below these, status indicators show 1 ONLINE, 0 BACK SOON, 0 AWAY, and 0 CURRENT CHATS. A banner at the top right says "Your 1 user account is free!" and shows the email myfat@liveperson.com. The main content area is titled "Agents" and displays a table of online agents. The table has columns for CURRENT STATE DURATION, AGENT NAME, SKILLS, CURRENT CHATS, and MAX CONCURRENCY. One agent, "Maya", is listed with 0m duration, Skill 1, 0 chats, and a max concurrency of 2. Below the table, it says "You are viewing 1 agent". At the bottom, there are buttons for "WAITING" (0) and "CLOSED" (0).

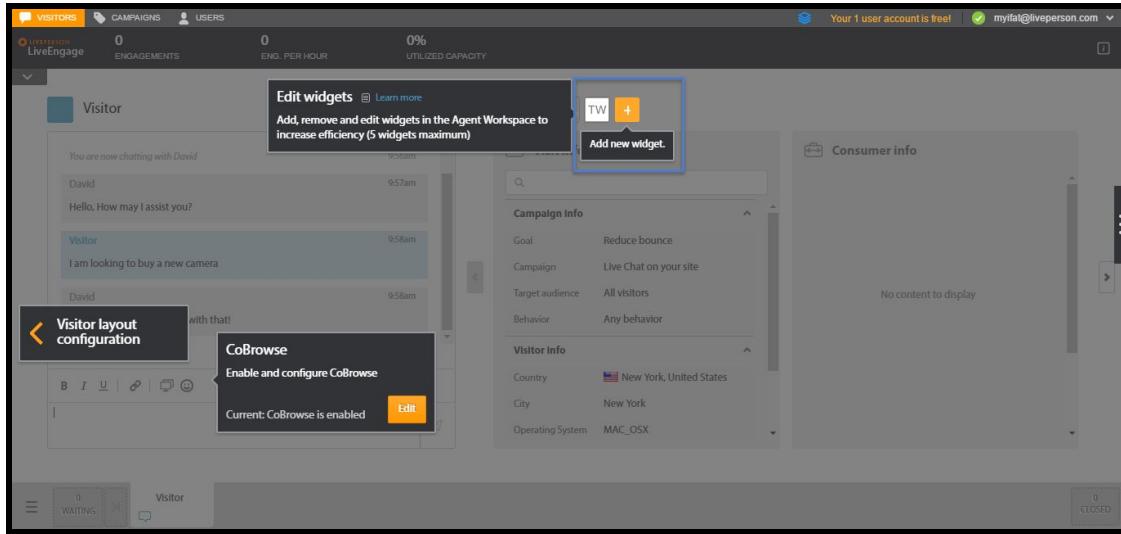
- Once in Night Vision, click on “Agent Workspace Configuration”:

This screenshot is similar to the previous one but includes a callout box highlighting the "Agent Workspace configuration" link in the sidebar. The sidebar also shows a "Default status" section with the option to set a default status upon login, currently set to "Online". Other sidebar options include "Change queue options" and "Accept chats manually, or automatically through Automatic Chat Distribution (ACD)". The main workspace area remains the same, showing the list of agents.

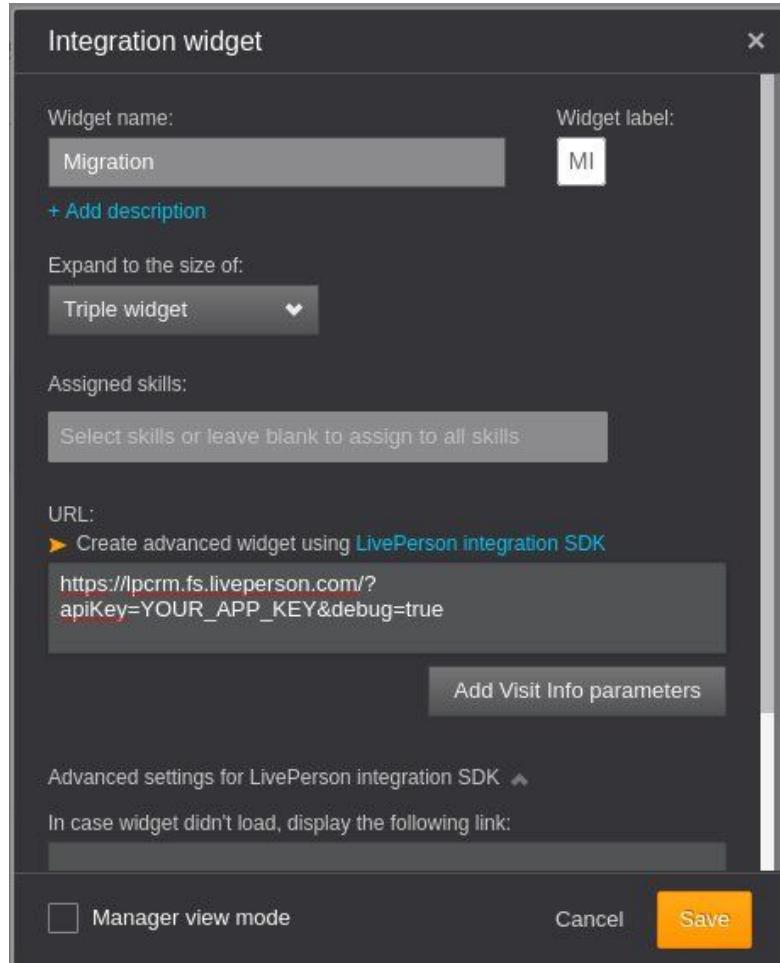
- Click on “+” icon to add a new widget. If you have used up 5 widgets, please contact your LivePerson Account Manager.



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4. Choose the name for the Widget (you can use "MS Dynamics" to have "MD" as the widget label)
5. Choose "Double Widget" or "Triple Widget"



6. Enter the following URL
 - o 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:
 - o 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 Microsoft Dynamics.

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

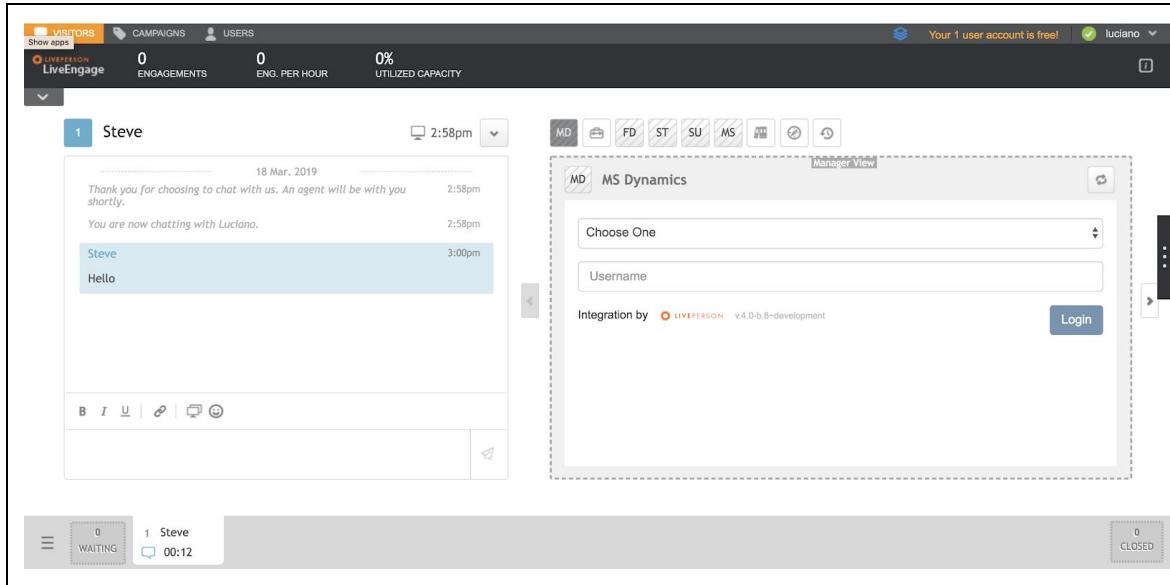
Overview

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

- Starting MS Dynamics 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 MS Dynamics Widget

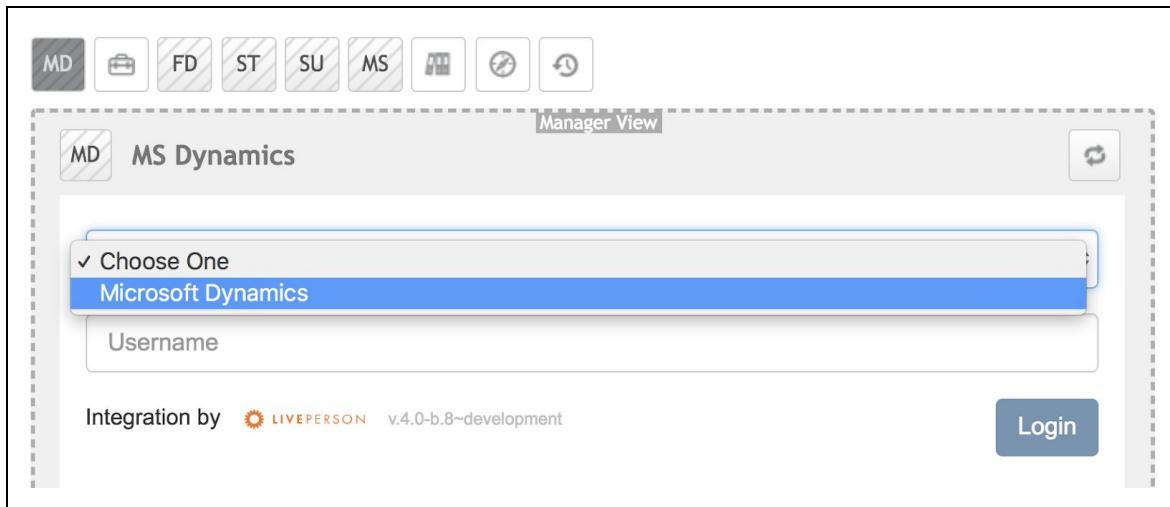
To start working on the new widget, accept a chat, click on "MS Dynamics" widget, login and you can view Contacts and Leads and create Accounts, Leads, Contacts and Cases directly in LiveEngage.



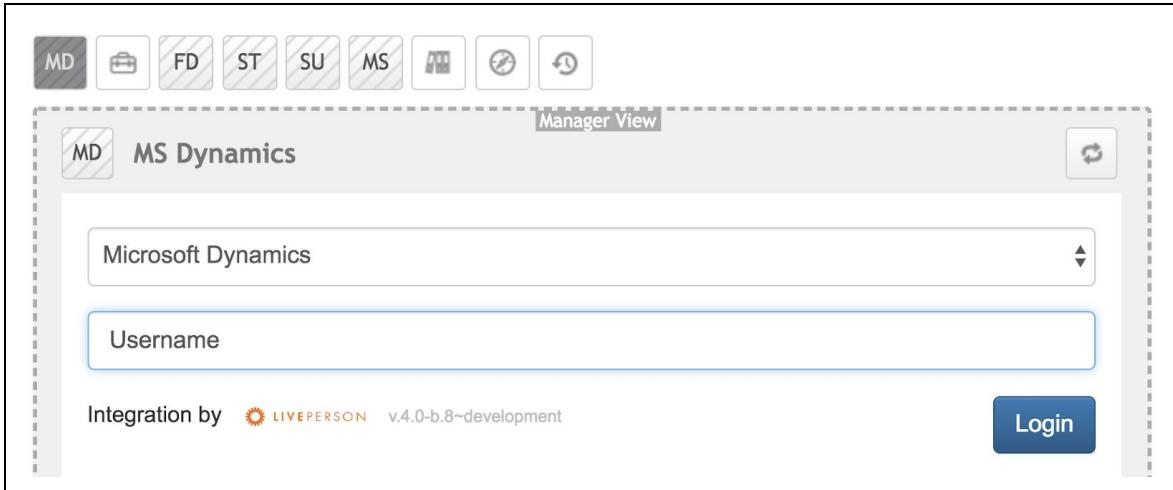
Login Widget

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

Select registered CRM:



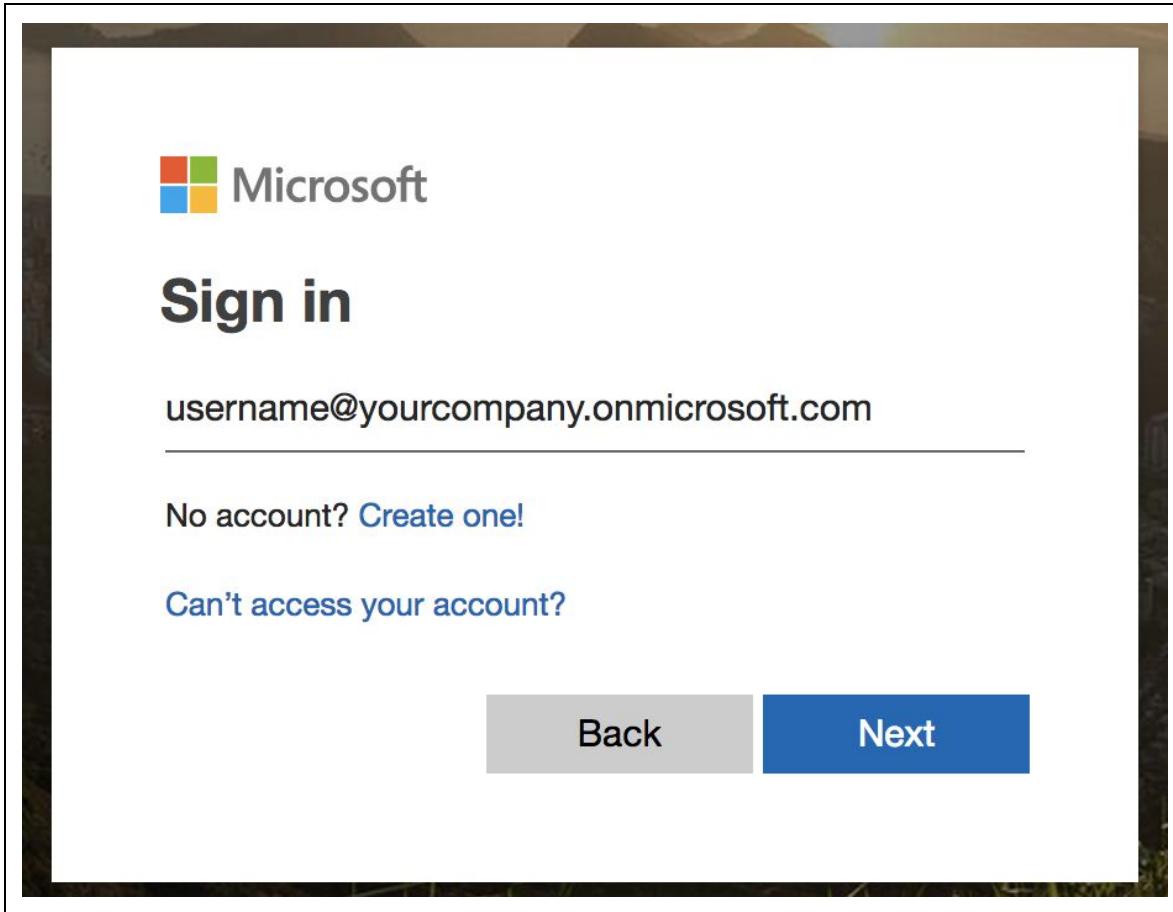
Enter your credentials (Username and Password) and click on "Login" button:



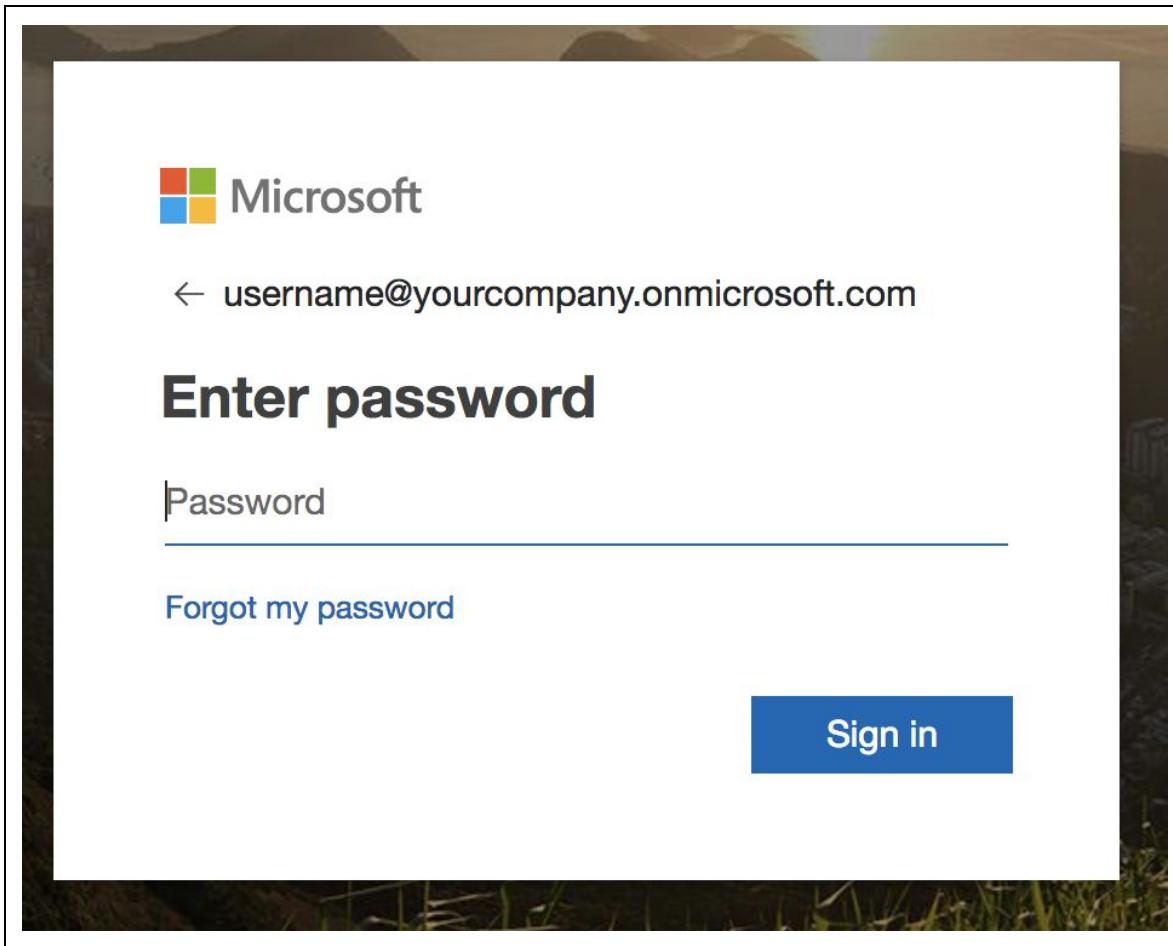
Click on "Authorize me" button:



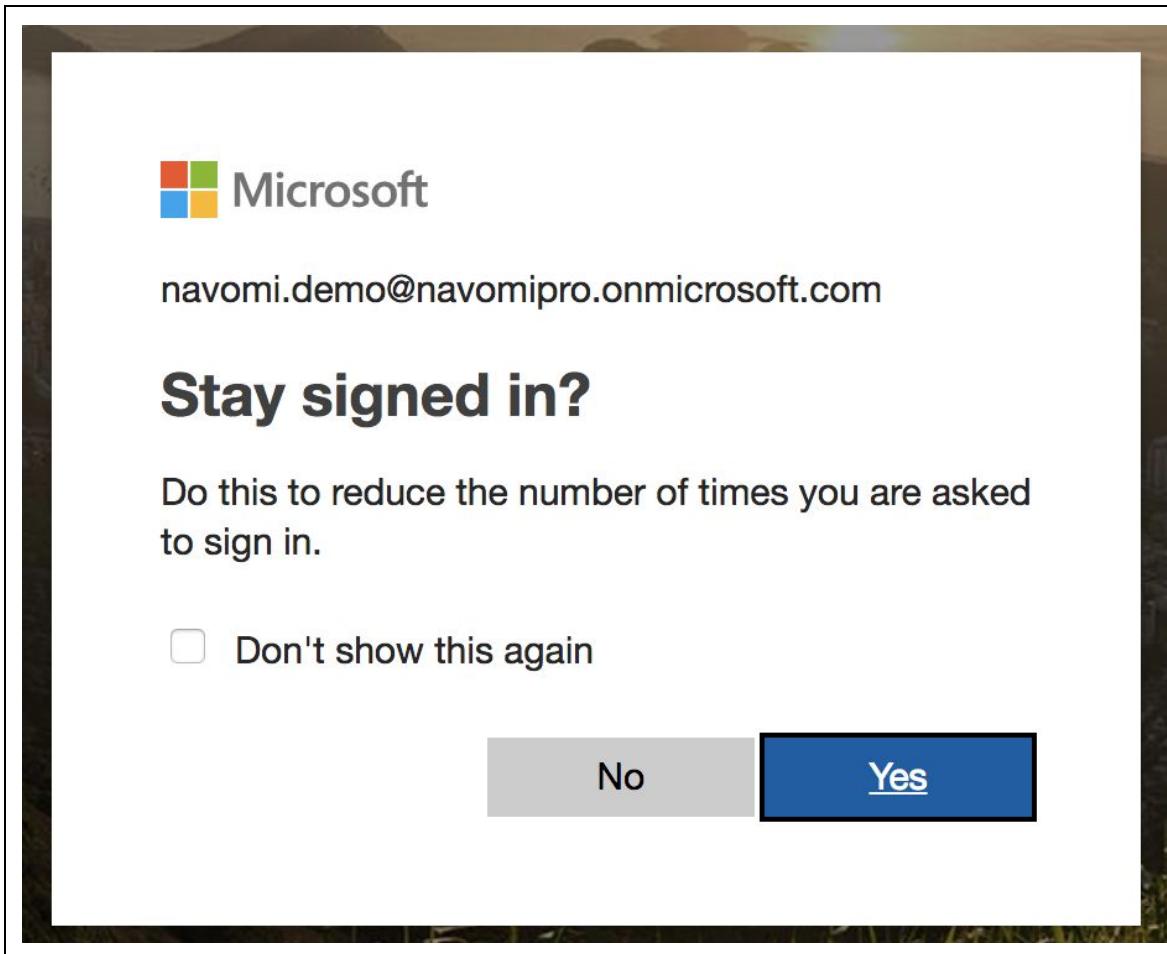
A new window will open for the CRM login. Be sure to enter valid credentials in the requested fields. Insert your MS Dynamics username and click on "Next" button:



Now insert your MS Dynamics password and click on "Next" button:



Sometimes this window will open if your credentials are right. Click on "No" or "Yes" to make your choice:



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



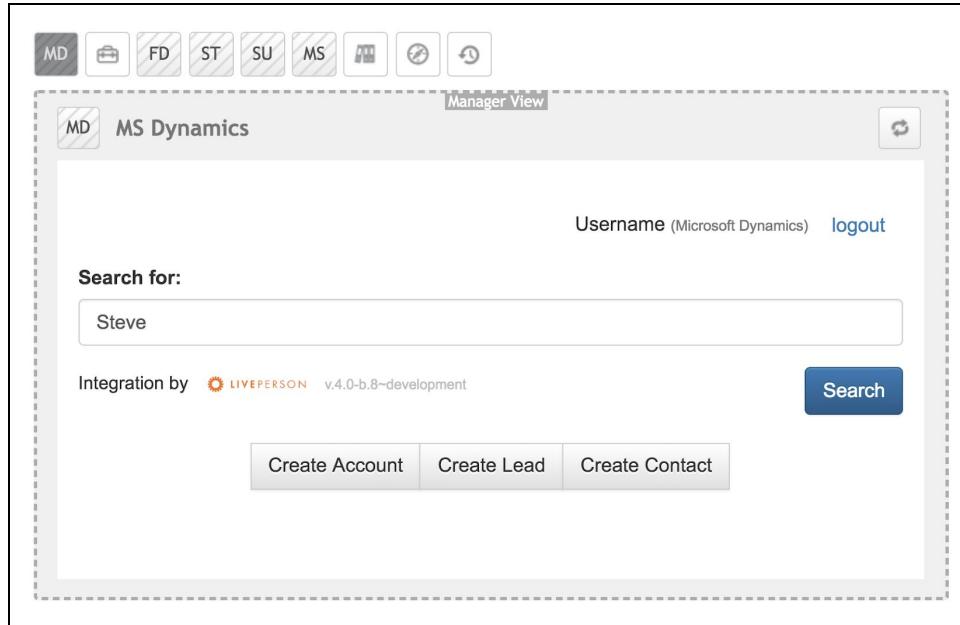
If the message has some type of error, follow these procedures:

- 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:



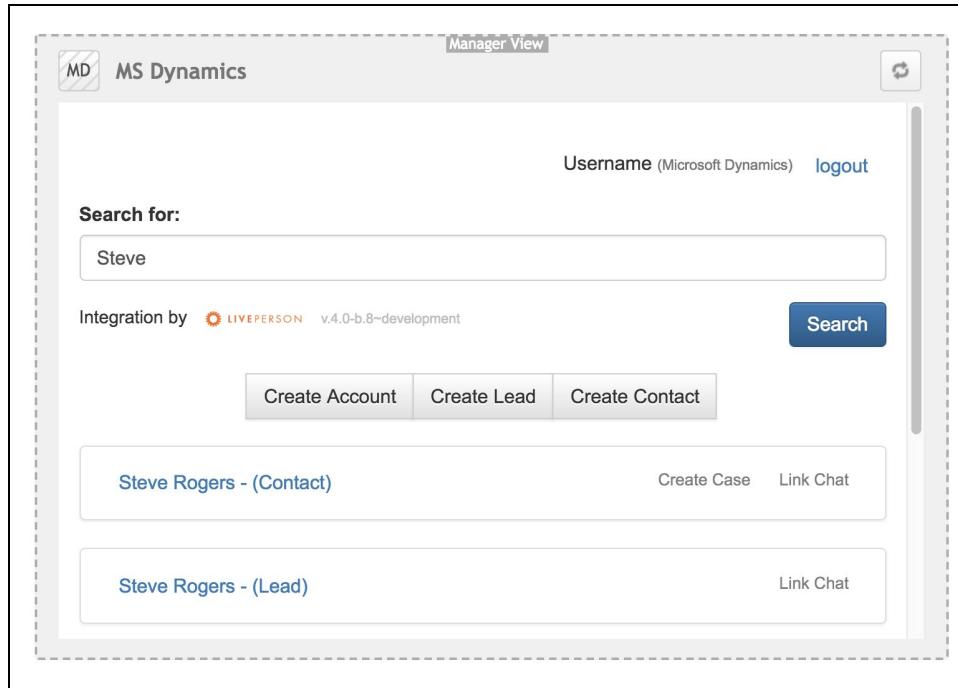
Custom Functionalities

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 MS Dynamics 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 MS Dynamics 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 tab "Widget Config" and select the drop down "Select a Search Field". Choose one option and click on "Save Config" to update the configuration.

LiveEngage CRM Customer Admin Panel

Profile Widget Config LE Attributes Config Support LE Widget Info

Dynamics Config

Create Account
 Auto Link Chat(Account)

Create Case (only for Account and Contacts) - beta

Create Contact
 Auto Link Chat(Contact)

Create Lead
 Auto Link Chat(Lead)
 Skip Info Prompt

Auto Create Lead

Exclude Chat Transcript (only Chat Session ID will be mentioned)

Disable Search

Select a Search Field

Email
✓ Name
Phone

Use **Name** field to search records.

Add Custom Survey Questions 

Save Config

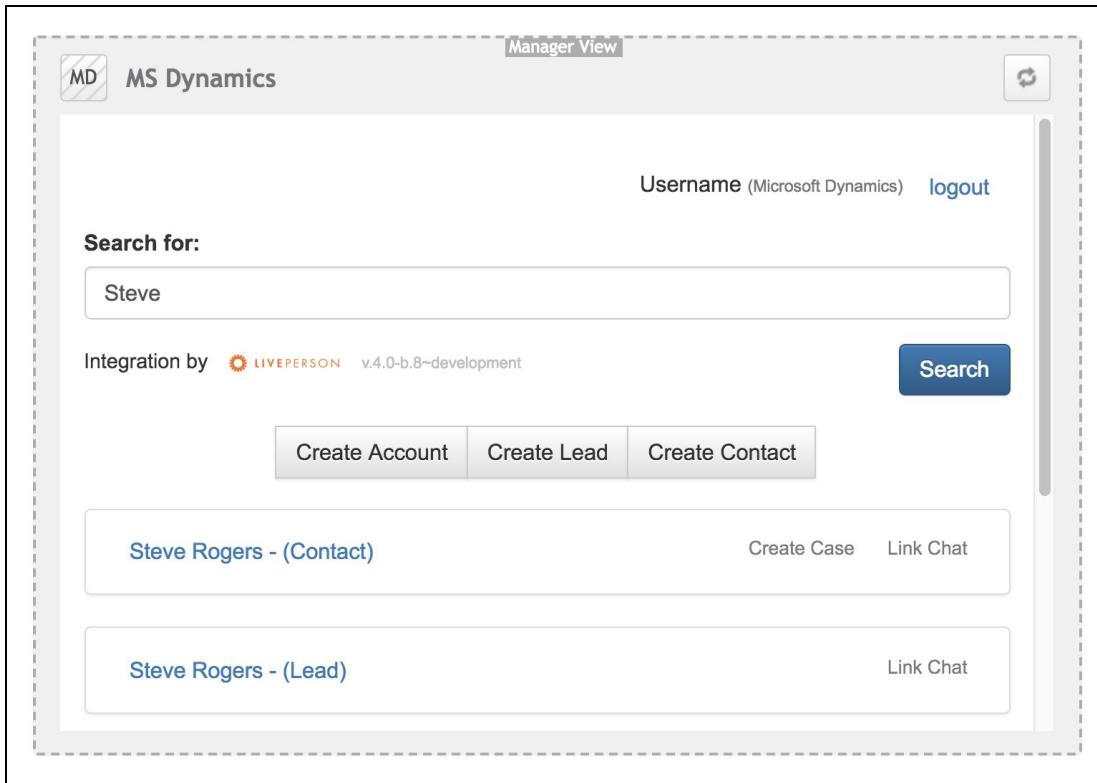
For new settings to take effect, you need to reload the widget in Live Engage. To do this, just click on the icon at the top of the widget on the right:



The screenshot shows a web-based application interface for Microsoft Dynamics. At the top left is a logo with 'MD' and the text 'MS Dynamics'. To the right is a button labeled 'Manager View'. A dark callout box with white text says 'Reloading the widget with the updated parameters.' with a small circular refresh icon. On the right side, there's a 'Username (Microsoft Dynamics)' field with a dropdown arrow and a 'logout' link. Below the header is a search bar with the placeholder 'Search for:' containing the name 'Steve'. Underneath the search bar is a status message 'Integration by  LIVEPERSON v.4.0-b.8~development'. To the right of this message is a blue 'Search' button. At the bottom of the interface are three buttons: 'Create Account', 'Create Lead', and 'Create Contact'.

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 (CONTACT and LEAD).



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

The screenshot shows the Microsoft Dynamics Manager View interface. At the top, there is a header with the Microsoft Dynamics logo and a "Manager View" button. On the right side of the header, there is a "Username (Microsoft Dynamics)" dropdown and a "logout" link. Below the header, there is a search bar with the placeholder text "Search for:" containing the name "Steve". A tooltip is displayed over the search results for "Steve Rogers". The tooltip contains the following information:

- Account: null
- Email: rogers@zxc.com
- Phone: 123123123

Below the tooltip, there are three buttons: "Create Account", "Create Lead", and "Create Contact". To the right of these buttons is a "Search" button. Further down the page, there are two more search results:

- [Steve Rogers - \(Contact\)](#) with "Create Case" and "Link Chat" buttons to the right.
- [Steve Rogers - \(Lead\)](#) with a "Link Chat" button to the right.

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

The screenshot shows the Microsoft Dynamics Manager View interface. At the top, there is a search bar with the placeholder "Search for:" containing the name "Steve". Below the search bar, it says "Integration by LIVEPERSON v.4.0-b.8-development". On the right side, there are links for "Username (Microsoft Dynamics)" and "logout". A "Search" button is located on the right. Below the search bar, there are three buttons: "Create Account", "Create Lead", and "Create Contact". A "Back" button is also present. The main content area is titled "Contact Details" and displays the following information:

Name	Steve Rogers
Title	
Email	rogers@zxc.com
Phone	123123123
Lead Source	
Record Owner	NAVOMI Demo
Link	

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.

The screenshot shows the Microsoft Dynamics Manager View interface. At the top, there is a header with the Microsoft Dynamics logo and a "Manager View" button. On the right side of the header, there is a "Username (Microsoft Dynamics)" field and a "logout" link. Below the header, there is a search bar with the placeholder "Search for:" containing the name "Steve". Underneath the search bar, it says "Integration by LIVEPERSON v.4.0-b.8~development". To the right of this text is a "Search" button. Below the search bar are three buttons: "Create Account", "Create Lead", and "Create Contact". A "Back" button is located to the left of the lead details section. The main content area is titled "Lead Details" and contains the following information:

Name	Steve Rogers
Company	Zxc
Title	
Email	rogers@zxc.com
Phone	123123123
Lead Source	
Lead Status	
Record Owner	NAVOMI Demo
Link	

Below the lead details, there is a section titled "Related Chat Transcripts" which displays a single transcript entry:

Chat Transcript with RT Session ID: 4294974055	03/18/19 18:12pm
--	------------------

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

[Back](#)

Lead Details

Name	Steve Rogers
Company	Zxc
Title	
Email	rogers@zxc.com
Phone	123123123
Lead Source	
Lead Status	
Record Owner	NAVOMI Demo
Link	

Related Chat Transcripts

Chat Transcript with RT Session ID: 4294974055

03/18/19 18:12pm

RT Session ID: 4294974055
LE Attributes:
false
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: Hello, how may I assist you?
info: Thank you for chatting with us.

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

To see the Linked chats, go to the Lead / Contact record and click in "Notes" tab:



The screenshot shows a Microsoft Dynamics 365 Lead record for "Steve Rogers". The top navigation bar includes "Dynamics 365", "Sales", "Leads > Steve Rogers", and various action buttons like "+ NEW", "DELETE", "QUALIFY", "PROCESS", "DISQUALIFY", "ADD TO MARKETING LIST", "ASSIGN", "SHARE", "EMAIL A LINK", and more.

Lead Details:

- Lead: Steve Rogers
- Lead Source: -----
- Rating: Warm
- Status: New
- Owner: NAVOMI Demo

Sales Process Flow:

The process is divided into four main stages: Qualify (Active for 2 hours), Develop, Propose, and Close. The current stage is Develop.

- Qualify (Active for 2 hours):**
 - Existing Contact? click to enter
 - Existing Account? click to enter
 - Purchase Timeframe click to enter
- Develop:**
 - Estimated Budget click to enter
 - Purchase Process click to enter
 - Identify Decision M... mark complete
- Propose:**
 - Capture Summary click to enter
- Close:**
 - click to enter

Lead to Opportunity Sales Process (Active for 2 hours) → **Next Stage**

Summary:

Contact:

Topic*	-----
Name*	Steve Rogers
Job Title	-----
Business Phone	123123123
Mobile Phone	-----
Email	rogers@zxc.cor

Notes:

POSTS ASSISTANT ACTIVITIES NOTES

Enter a note

Chat Transcript with RT Session ID: 4294974055

RT Session ID: 4294974055
LE Attributes:
false
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

Stakeholders:

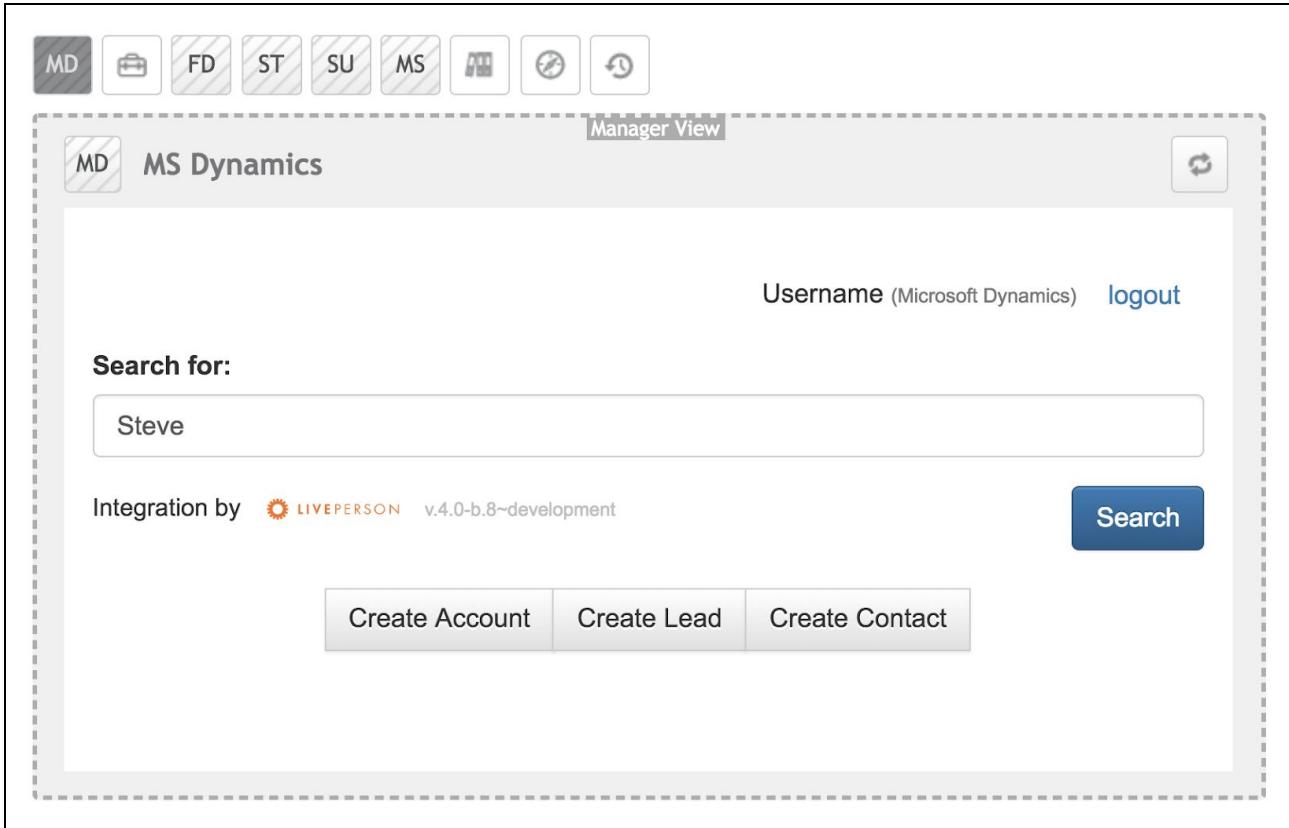
No stakeholders found.

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

Create New Records

The MS Dynamics 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 the "Create Contact".

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

[Create Account](#) [Create Lead](#) [Create Contact](#)

Quick Create Contact

First Name *	<input type="text" value="Steve"/>
Last Name *	<input type="text" value="Rogers"/>
Email *	<input type="text" value="rogers@zxc.com"/>
Phone	<input type="text" value="123123123"/>

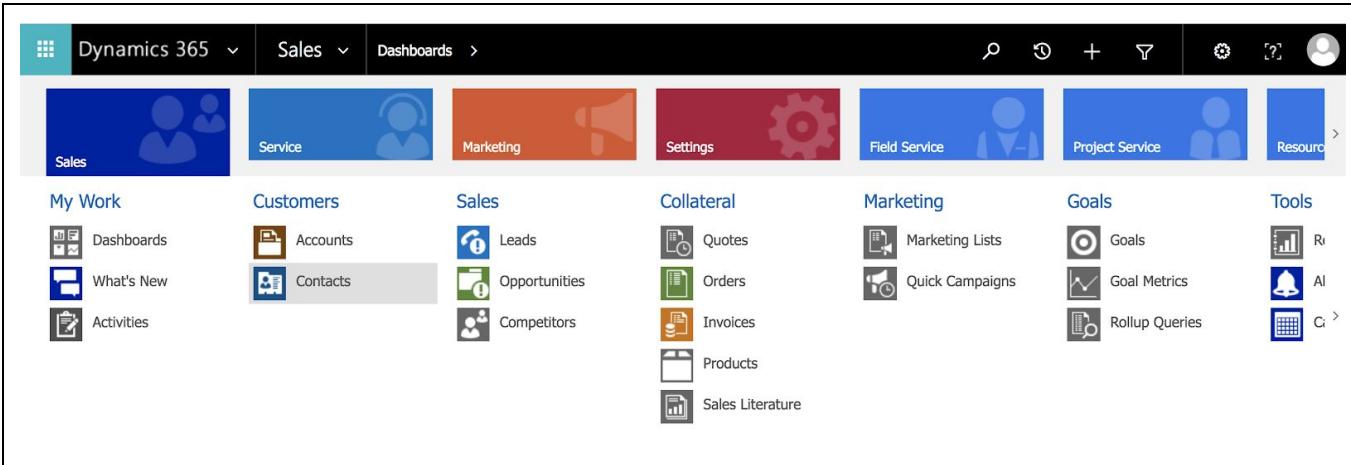
[Cancel](#) [Create](#)

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

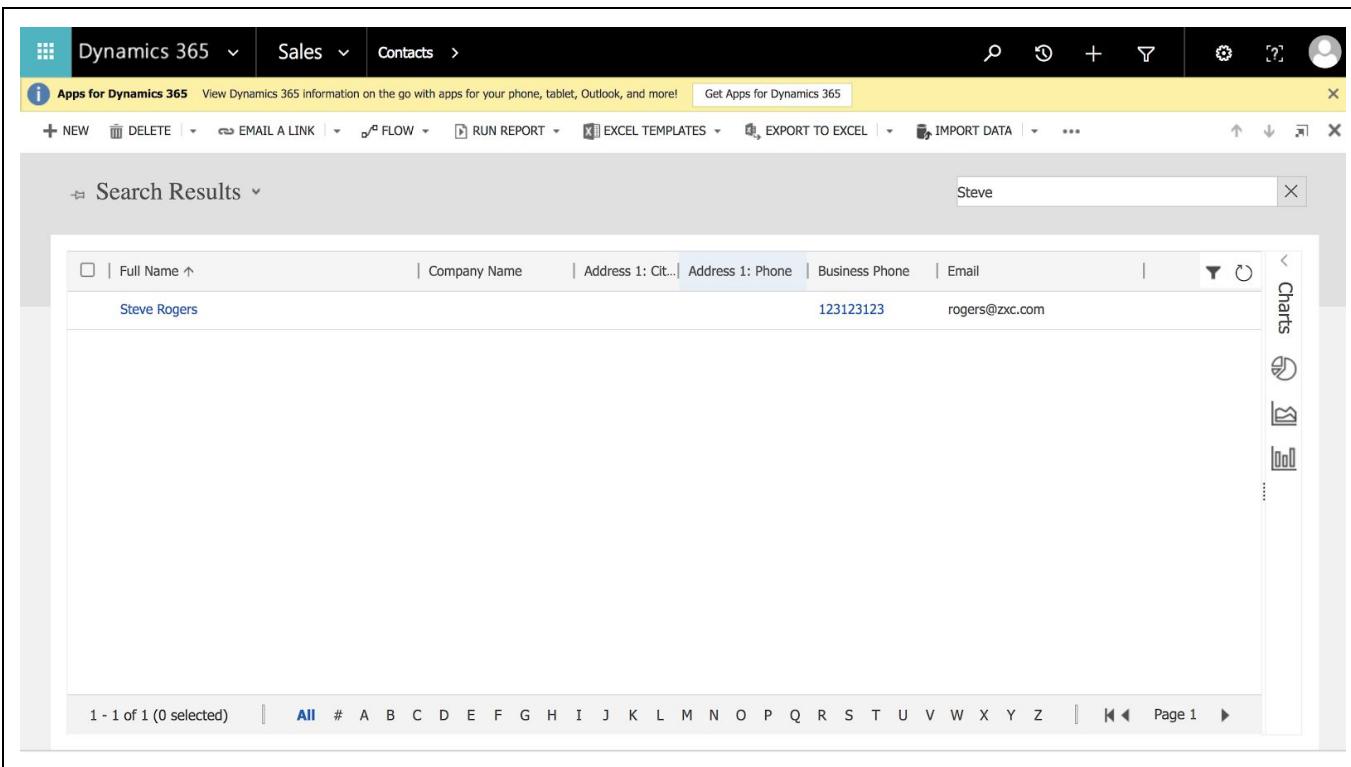


Note where this record will be stored in CRM system itself. Go to Contacts using the top menu:

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And use the search box at the top to find the record you want and click on it:



Or access directly the last record created in the Dashboard:

Sales Activity Social Dashboard

Sales Pipeline

My Open Opportunities

What's New

All posts Auto posts User posts Assistant

All records |

Steve Rogers
 Contact: Created By NAVOMI Demo.
 On Steve Rogers's wall
 Today 3:30 PM

LIKE REPLY X

And when you click the last record, the window with the detailed data opens:

CONTACT Steve Rogers

Summary

CONTACT INFORMATION

- Full Name * Steve Rogers
- Job Title
- Account Name
- Email rogers@zxc.com
- Business Phone 123123123
- Mobile Phone
- Fax
- Preferred Method of Contact Any
- Address

POSTS

Enter post here

All posts Auto posts User posts

Steve Rogers
 Contact: Created By NAVOMI Demo.
 On Steve Rogers's wall
 Today 3:30 PM

RECENT OPPORTUNITIES

No Opportunities found for this Contact. Select Add (+).

RECENT CASES

No Cases found for this Contact. Select Add (+).

Active

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.

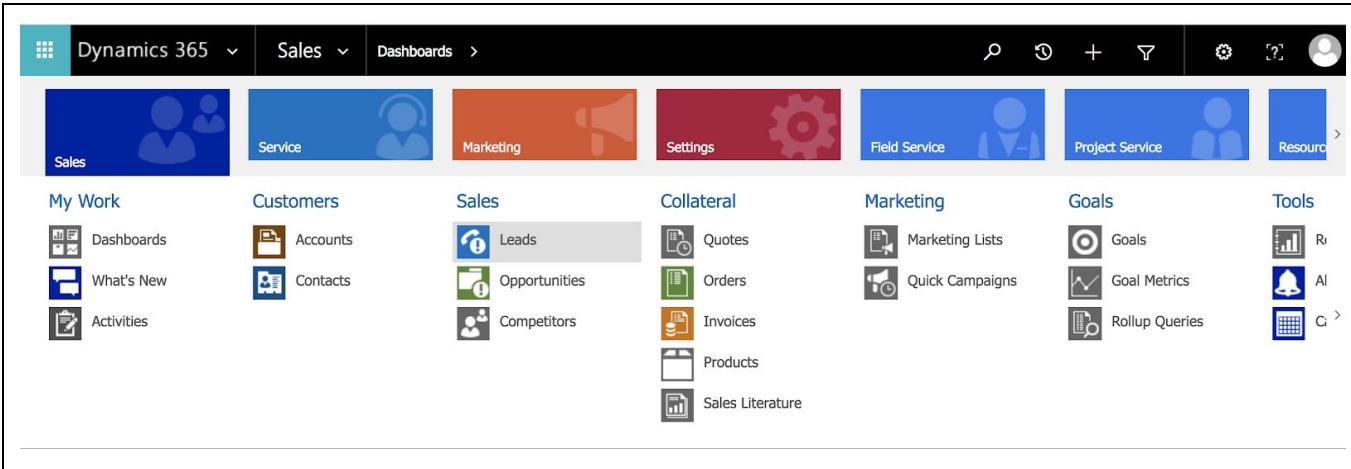
The screenshot shows a 'Quick Create Lead' form. At the top, there are three buttons: 'Create Account', 'Create Lead' (which is highlighted with a blue border), and 'Create Contact'. Below the buttons, the form has five input fields with placeholder text: 'First Name *' (Steve), 'Last Name *' (Rogers), 'Email *' (rogers@zxc.com), 'Phone' (123123123), and 'Company *' (Zxc). At the bottom right are two buttons: 'Cancel' (orange) and 'Create' (blue).

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



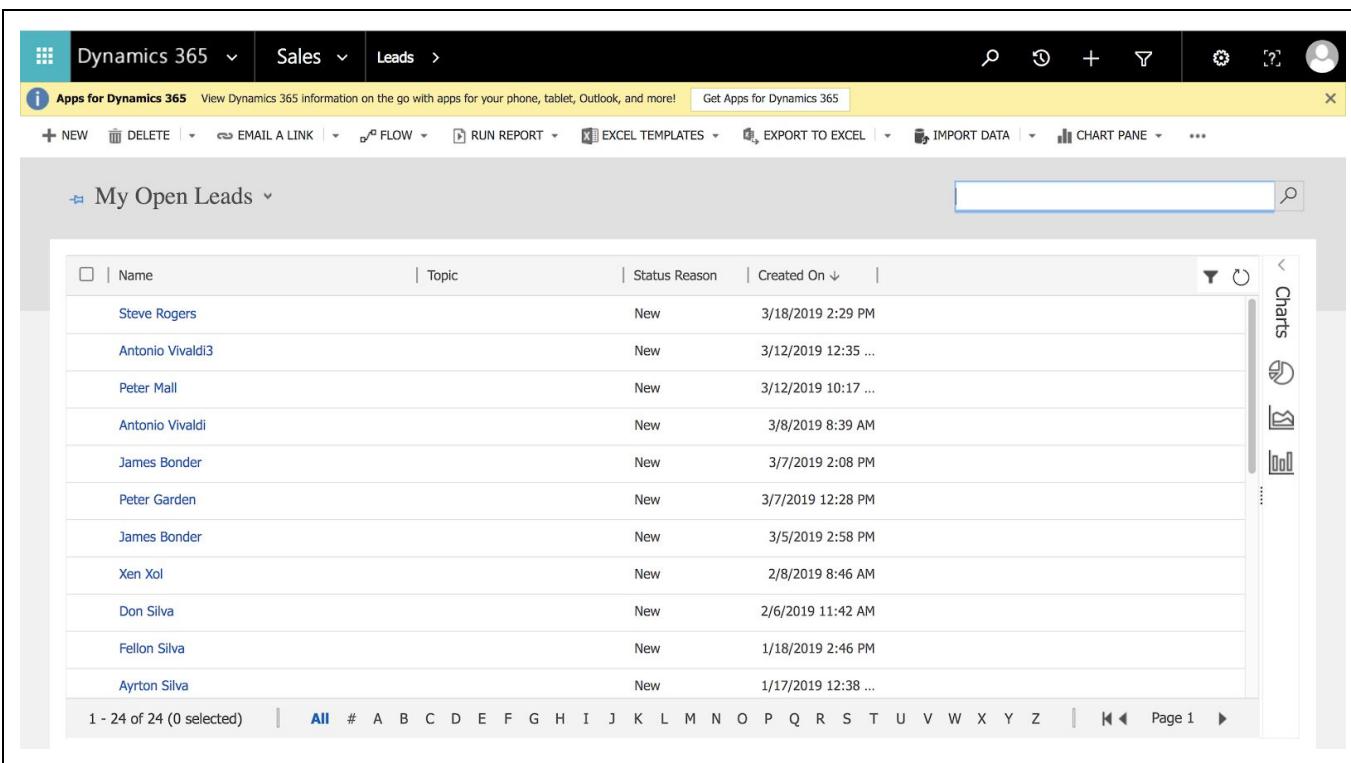
Note where this record will be stored in CRM system itself. Go to Leads using the top menu:

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The screenshot shows the Dynamics 365 Home dashboard. At the top, there are links for Dynamics 365, Sales, Dashboards, and a search bar. Below this is a grid of icons representing different modules: Sales, Service, Marketing, Settings, Field Service, Project Service, and Resources. Under the Sales module, there's a section for 'My Work' with links to Dashboards, What's New, and Activities. The 'Sales' section contains links for Leads, Opportunities, Competitors, Quotes, Orders, Invoices, Products, and Sales Literature. The 'Marketing' section includes Marketing Lists, Quick Campaigns, Goals, Goal Metrics, and Rollup Queries. The 'Tools' section has links for Reports, AI, and Rollup Queries.

And use the search box at the top to find the record you want and click on it:



The screenshot shows the Dynamics 365 Leads list view. The top navigation bar includes Dynamics 365, Sales, Leads, and a search bar. Below the navigation are various action buttons: NEW, DELETE, EMAIL A LINK, FLOW, RUN REPORT, EXCEL TEMPLATES, EXPORT TO EXCEL, IMPORT DATA, CHART PANE, and three dots. The main area displays a grid of 'My Open Leads' with columns for Name, Topic, Status Reason, and Created On. The grid lists 24 entries, each with a checkbox and a preview icon. The right side of the screen features a chart pane with four chart icons: Charts, Pie, Line, and Bar.

Name	Topic	Status Reason	Created On
Steve Rogers		New	3/18/2019 2:29 PM
Antonio Vivaldi3		New	3/12/2019 12:35 ...
Peter Mall		New	3/12/2019 10:17 ...
Antonio Vivaldi		New	3/8/2019 8:39 AM
James Bonder		New	3/7/2019 2:08 PM
Peter Garden		New	3/7/2019 12:28 PM
James Bonder		New	3/5/2019 2:58 PM
Xen Xol		New	2/8/2019 8:46 AM
Don Silva		New	2/6/2019 11:42 AM
Fellon Silva		New	1/18/2019 2:46 PM
Ayrton Silva		New	1/17/2019 12:38 ...
1 - 24 of 24 (0 selected)	All	# A B C D E F G H I J K L M N O P Q R S T U V W X Y Z	Page 1

Or access directly the last record created in the Dashboard::

Sales Activity Social Dashboard

Sales Pipeline

My Open Opportunities

What's New

All posts Auto posts User posts Assistant

All records |

Steve Rogers
NAVOMI Demo created Steve Rogers
On Steve Rogers's wall
Today 3:29 PM

LIKE REPLY X

And when you click the last record, the window with the detailed data opens:

Dynamics 365 > Sales > Leads > Steve Rogers

Apps for Dynamics 365 View Dynamics 365 information on the go with apps for your phone, tablet, Outlook, and more! Get Apps for Dynamics 365

+ NEW - DELETE QUALIFY PROCESS DISQUALIFY ADD TO MARKETING LIST ASSIGN SHARE EMAIL A LINK ...

LEAD Steve Rogers

Qualify (Active for 13 minutes)

Existing Contact? click to enter
Existing Account? click to enter
Purchase Timeframe click to enter

Estimated Budget click to enter
Purchase Process click to enter
Identify Decision M... mark complete

Lead Source Rating Warm Status New Owner NAVOMI Demo

Summary

Contact

Topic *
Name * Steve Rogers
Job Title
Business Phone **123123123**
Mobile Phone
Email **rogers@zxc.com**

Company

Company * Zxc
Open

Posts

Enter post here

All posts Auto posts User posts

Steve Rogers
NAVOMI Demo created Steve Rogers
On Steve Rogers's wall
Today 3:29 PM

ASSISTANT

ACTIVITIES

NOTES

Stakeholders

Name Role
No stakeholders found.

Competitors

Name Website



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.

The screenshot shows a dialog box titled "Quick Create Account". At the top, there are three buttons: "Create Account" (highlighted with a blue border), "Create Lead", and "Create Contact". Below the buttons, the form fields are displayed:

Account Name *	Zxc
Email *	rogers@zxc.com
Phone	123123123

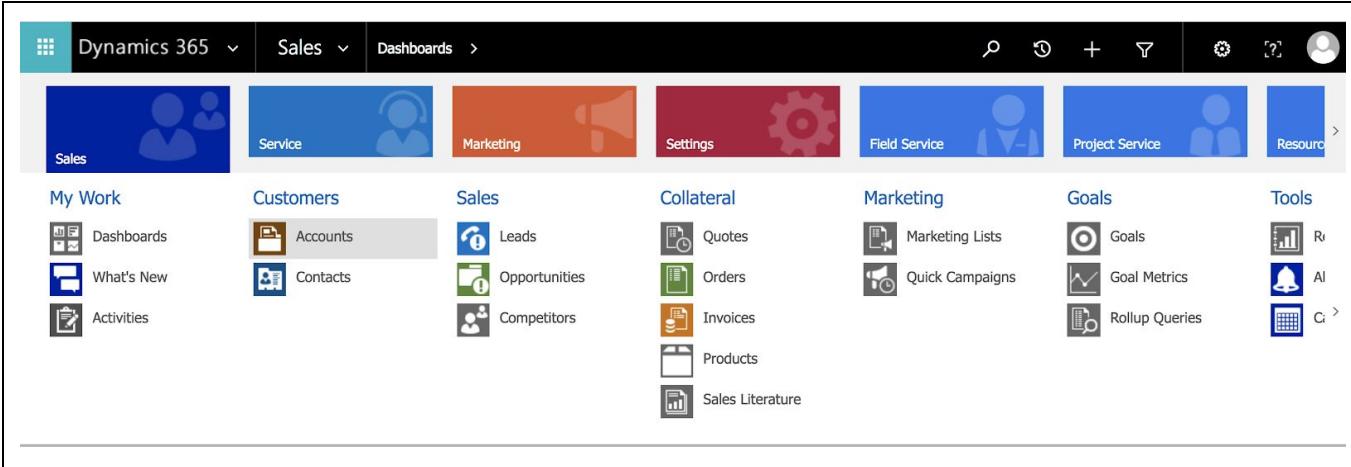
At the bottom right of the dialog box are two buttons: "Cancel" (orange) and "Create" (blue).

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



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

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And use the search box at the top to find the record you want and click on it:

The screenshot shows the Dynamics 365 Accounts search results page. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Accounts'. A search bar at the top right contains the text 'Zxc'. Below the search bar is a toolbar with options: NEW, DELETE, EMAIL A LINK, FLOW, RUN REPORT, EXCEL TEMPLATES, EXPORT TO EXCEL, IMPORT DATA, and others. The main area displays a table of search results for accounts. The columns are: Account Name (sorted by Account Name), Account Num..., Primary Contact, Address 1: City, Main Phone, and Email. The results list several entries starting with 'Zxc' and 'ZXC'. On the right side of the table, there are buttons for Charts, a pie chart, a line graph, and a bar chart. At the bottom of the table, there are pagination controls showing '1 - 11 of 11 (0 selected)' and letter-based navigation from 'A' to 'Z'.

Or access directly the last record created in the Dashboard:

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The screenshot shows the 'Sales Activity Social Dashboard' in Dynamics 365. At the top, there's a navigation bar with 'Dynamics 365', 'Sales', and 'Dashboards'. Below it is a toolbar with 'SAVE AS', 'NEW', 'SET AS DEFAULT', 'REFRESH ALL', and other icons. A yellow banner at the top says 'Apps for Dynamics 365' and 'Get Apps for Dynamics 365'. The main area has a title 'Sales Pipeline' and a section for 'My Open Opportunities'. To the right is a 'What's New' feed with a post from 'Zxc' about creating an account. The post details: Account: Created By NAVOMI Demo., On Zxc's wall, Today 3:32 PM. There are tabs for 'All posts', 'Auto posts', 'User posts', and 'Assistant'.

And when you click the last record, the window with the detailed data opens:

The screenshot shows the 'Accounts' detail page for 'Zxc'. The top navigation bar includes 'Dynamics 365', 'Sales', 'Accounts', and the account name 'Zxc'. The toolbar below has options like '+ NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', 'ASSIGN', 'EMAIL A LINK', 'DELETE', 'FORM', 'PROCESS', and '...'. The main area displays account information: Account Name (Zxc), Phone (123123123), Fax, Website, Parent Account, Ticker Symbol, Relationship Type, and Product Price List. To the right, there's a 'Summary' section with tabs for 'ACCOUNT INFORMATION', 'POSTS', 'ASSISTANT', 'ACTIVITIES', and 'NOTES'. The 'POSTS' tab shows a post from 'Zxc' about creating an account. The 'CONTACTS' section below says 'No Contacts found for this Account. Select Add (+)'.



Create Case

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

Search for:

Additional Info: Steve Rogers

Subject*

Test Case

Description*

Case Description

Continue Cancel

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

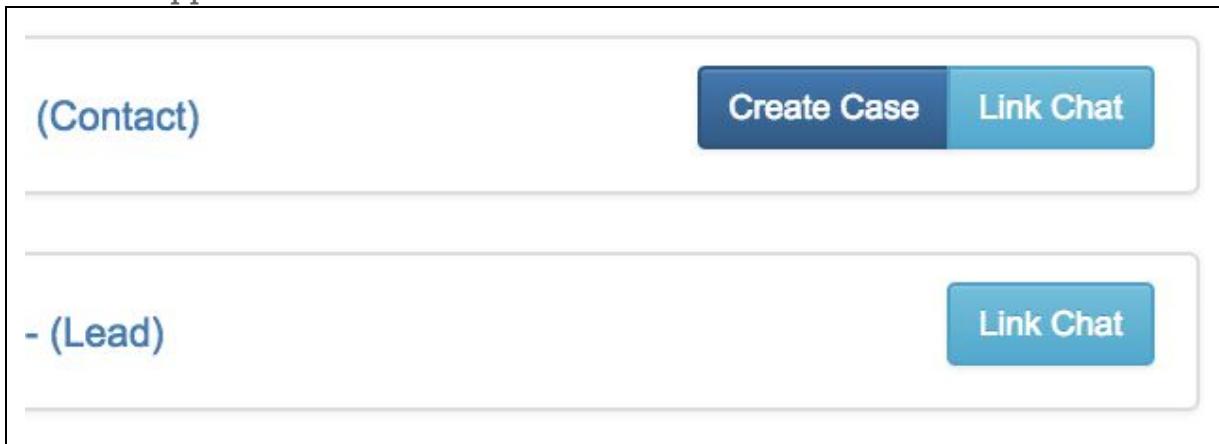


Note! "Create Case" can only be done when the chat session has ended. The "Create Case" button is disabled throughout an active engagement.

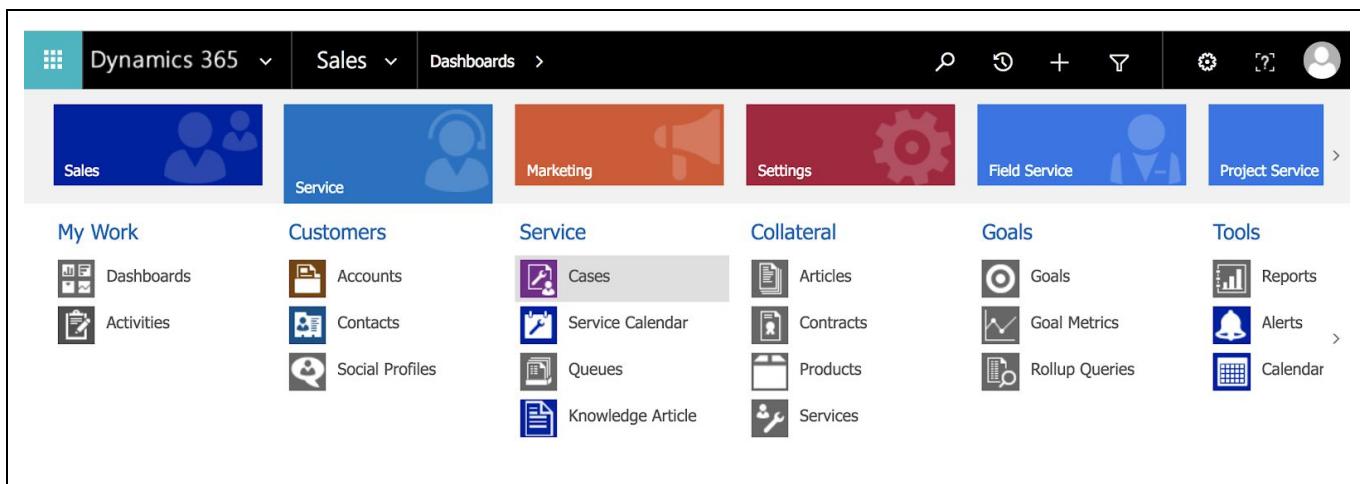
Disabled buttons appearance:



Enabled buttons appearance:

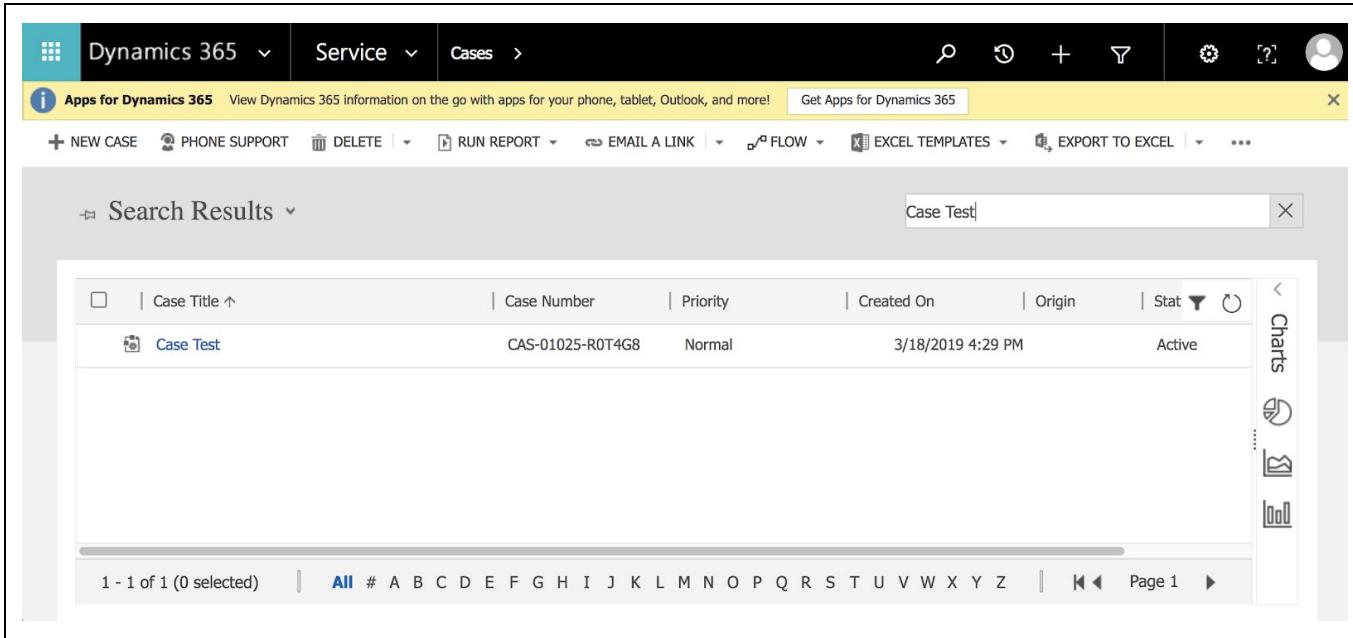


Note where this record will be stored in CRM system itself. Go to Cases using the top menu:



LE - MS DYNAMICS Integration Guide

And use the search box at the top to find the record you want and click on it:

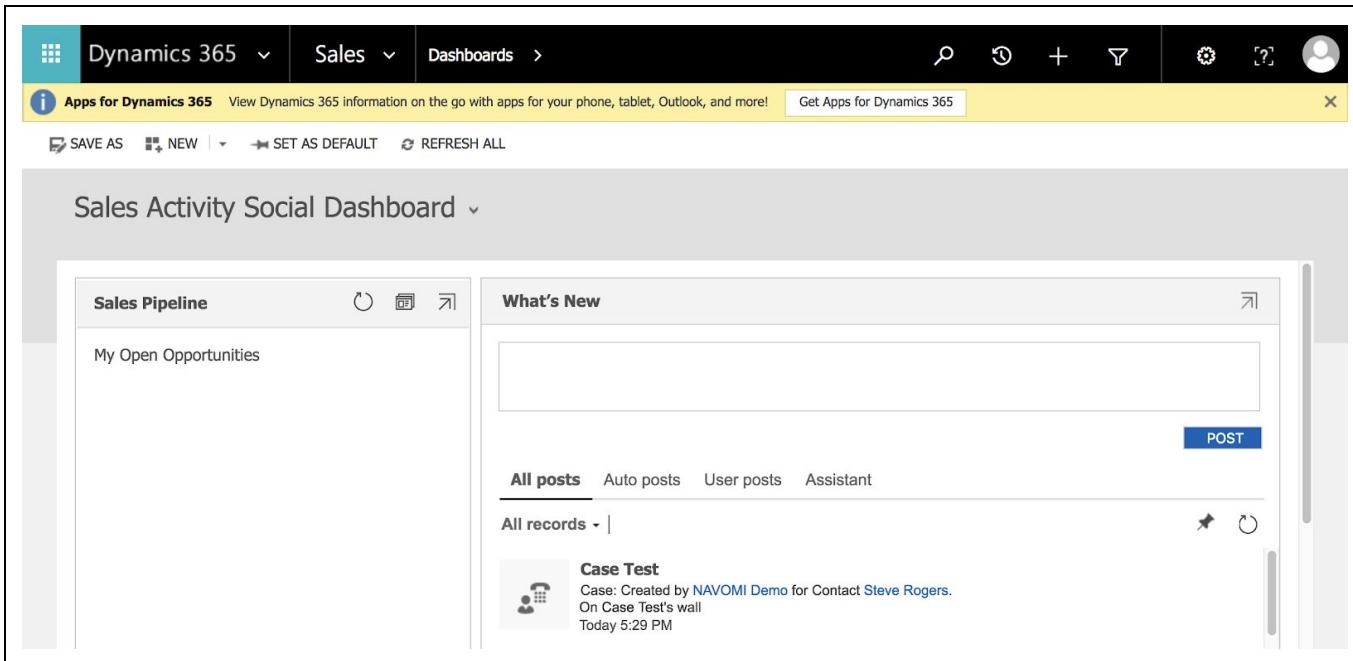


The screenshot shows the Dynamics 365 interface for the 'Cases' module. The top navigation bar includes 'Dynamics 365', 'Service', and 'Cases'. A search bar at the top right contains the text 'Case Test'. Below the search bar is a toolbar with various actions like 'NEW CASE', 'PHONE SUPPORT', 'DELETE', 'RUN REPORT', 'EMAIL A LINK', 'FLOW', 'EXCEL TEMPLATES', 'EXPORT TO EXCEL', and more. The main area displays a table titled 'Search Results' with one record listed:

Case Title	Case Number	Priority	Created On	Origin	Stat
Case Test	CAS-01025-ROT4G8	Normal	3/18/2019 4:29 PM	Active	

At the bottom of the search results table, there is a pagination bar showing '1 - 1 of 1 (0 selected)' and letters A through Z for filtering. To the right of the table is a vertical sidebar with icons for 'Charts' and other data visualization options.

Or access directly the last record created in the Dashboard::



The screenshot shows the Dynamics 365 interface for the 'Sales' module, specifically the 'Dashboards' section. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Dashboards'. A search bar at the top right contains the text 'Case Test'. Below the search bar is a toolbar with actions like 'SAVE AS', 'NEW', 'SET AS DEFAULT', and 'REFRESH ALL'. The main area displays a dashboard titled 'Sales Activity Social Dashboard' with two main sections: 'Sales Pipeline' and 'What's New'. The 'What's New' section shows a post from a user named 'Case Test' with the following details:

Case Test
Case: Created by NAVOMI Demo for Contact Steve Rogers.
On Case Test's wall
Today 5:29 PM



And when you click the last record, the window with the detailed data opens:

The screenshot shows the Dynamics 365 Case Test record detail page. At the top, the navigation bar includes 'Dynamics 365', 'Service', 'Cases > Case Test >', and various action buttons like 'SAVE & ROUTE', 'NEW', 'CREATE CHILD CASE', 'RESOLVE CASE', 'CANCEL CASE', 'ADD TO QUEUE', 'QUEUE ITEM DETAILS', and more.

The main header displays the record title 'Case Test' and its details: Priority 'Normal', Created On '3/18/2019 4:29 PM', Status 'In Progress', and Owner 'NAVOMI Demo'.

A green progress bar at the top indicates the current stage: 'Identify (Active for 1 minute)' followed by 'Research' and 'Resolve'.

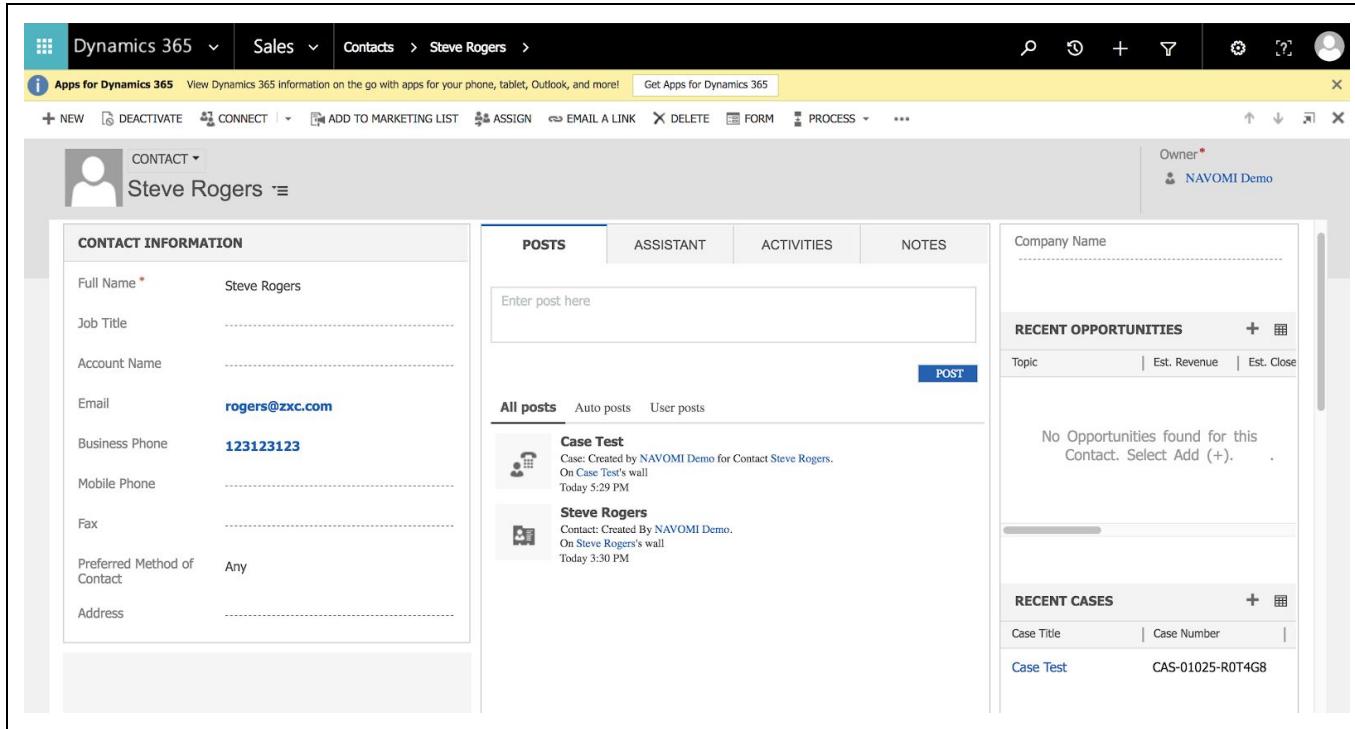
The 'Summary' section contains the 'CASE DETAILS' table and the 'CUSTOMER DETAILS' section for 'Steve Rogers'. The 'CASE DETAILS' table includes fields for Case Title (Case Test), ID (CAS-01025-R0T4G8), Subject, Customer (Steve Rogers), Origin, Contact, and Status (Active).

The 'CUSTOMER DETAILS' section shows contact information for Steve Rogers, including Company (Company), Email (rogers@zxc.com), Mobile (123123123), and Business (123123123).

The 'POSTS' section shows a post area with a placeholder 'Enter post here' and a 'POST' button. Below it, there are links for 'All posts', 'Auto posts', and 'User posts'. A specific post from 'Case Test' is shown, stating: 'Case: Created by NAVOMI Demo for Contact Steve Rogers. On Case Test's wall Today 5:29 PM'.

The 'RECENT CASES' section lists recent cases.

Or you can use a third way to access Cases: go to the Contact record, and the Cases are listed in two places: in the middle, in All Posts section or in the right menu section Recent Cases:



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 MS Dynamics.

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



When the Chat is linked successfully, the message will be displayed:



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 shows the Microsoft Dynamics Manager View interface. At the top, there is a navigation bar with the MS Dynamics logo, a search bar containing "Steve", and a "Search" button. Below the search bar, it says "Integration by LIVEPERSON v.4.0-b.8~development". On the right side of the header, there are links for "Username (Microsoft Dynamics)" and "logout".

In the main content area, there is a "Lead Details" section with the following fields and values:

Name	Steve Rogers
Company	Zxc
Title	
Email	rogers@zxc.com
Phone	123123123
Lead Source	
Lead Status	
Record Owner	NAVOMI Demo
Link	

Below the lead details, there is a section titled "Related Chat Transcripts" which displays a single transcript entry:

Chat Transcript with RT Session ID: 4294974055	03/18/19 18:12pm
--	------------------

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

The screenshot shows a CRM interface for a lead record. At the top left is a 'Back' button. Below it, the section title 'Lead Details' is centered. A table of lead information follows:

Name	Steve Rogers
Company	Zxc
Title	
Email	rogers@zxc.com
Phone	123123123
Lead Source	
Lead Status	
Record Owner	NAVOMI Demo
Link	

Below the lead details is a section titled 'Related Chat Transcripts'. It contains a list of transcripts:

Chat Transcript with RT Session ID: 4294974055	03/18/19 18:12pm
RT Session ID: 4294974055 LE Attributes: false 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: Hello, how may I assist you? info: Thank you for chatting with us.	

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

To see the Linked chats, go to the Lead / Contact record and click in "Notes" tab:



The screenshot shows the Microsoft Dynamics 365 interface for a Lead record. The top navigation bar includes 'Dynamics 365', 'Sales', 'Leads > Steve Rogers', and various action buttons like '+ NEW', 'DELETE', 'QUALIFY', 'PROCESS', 'DISQUALIFY', 'ADD TO MARKETING LIST', 'ASSIGN', 'SHARE', 'EMAIL A LINK', and more.

Lead Record Details:

- Lead:** Steve Rogers
- Lead Source:** [empty]
- Rating:** Warm
- Status:** New
- Owner:** NAVOMI Demo

Process Flow: The process is titled 'Lead to Opportunity Sales Process (Active for 2 hours)'. It consists of four main stages: Qualify (Active for 2 hours), Develop, Propose, and Close. Each stage has associated tasks and status indicators.

- Qualify (Active for 2 hours):** Tasks include 'Existing Contact?' (click to enter), 'Existing Account?' (click to enter), and 'Purchase Timeframe' (click to enter).
- Develop:** Tasks include 'Estimated Budget' (click to enter), 'Purchase Process' (click to enter), and 'Identify Decision M...' (mark complete).
- Propose:** Task: 'Capture Summary' (click to enter).
- Close:** Task: 'Capture Summary' (click to enter).

Summary Section:

- Contact:** Includes fields for Topic*, Name*, Job Title, Business Phone (123123123), Mobile Phone, and Email (rogers@zxc.cor).
- Notes:** A note area contains a 'Chat Transcript with RT Session ID: 4294974055' section. It shows the session ID, LE Attributes (false), and visitor name (Steve). Below this is a transcript of a chat session.
- Stakeholders:** A list titled 'No stakeholders found.'

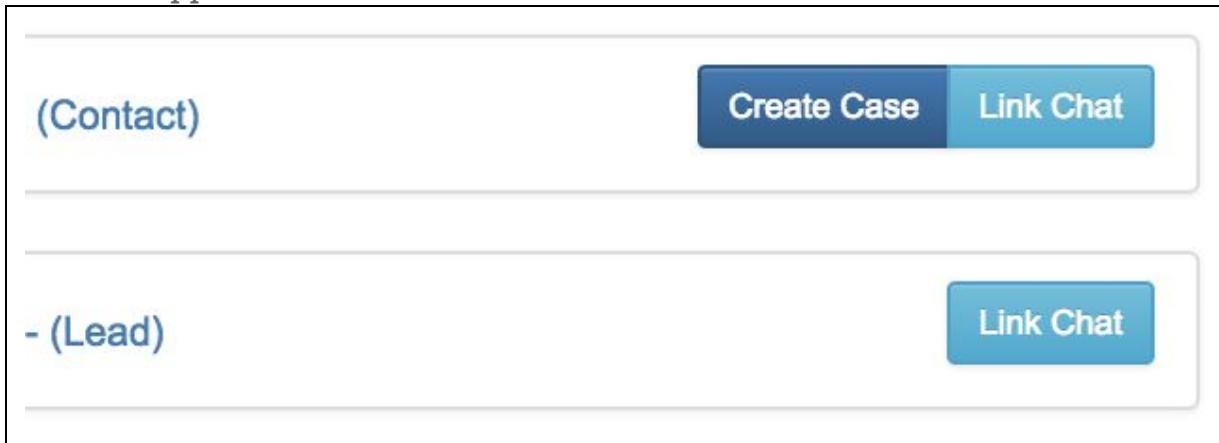
Note! "Link Chat" can only be done when the chat session has ended. The "Link Chat" button is disabled throughout an active engagement.

Disabled buttons appearance:

The image shows two examples of disabled 'Link Chat' buttons in the Microsoft Dynamics interface.

- (Contact):** Shows a 'Create Case' button next to a disabled 'Link Chat' button.
- (Lead):** Shows a disabled 'Link Chat' button.

Enabled buttons appearance:



Updating Records

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

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