



Quick Start Series

101



Salesforce Live Agent Integration

Crownpeak DXM

Introduction

Crownpeak DXM is a best-of-breed of platform that easily integrates with other platforms to provide a flexible way for customers to better meet their unique operational and strategic needs. In this Quick Start we will integrate Salesforce Live Agent with Crownpeak DXM, empowering editorial teams to choose when and where they want to place the Live Agent function in their sites.



In this tutorial, we will use a free Salesforce Development account; however, you will require a licenced version of Salesforce Live Agent to apply the exact same steps in your own environments.

Overview of tutorial steps

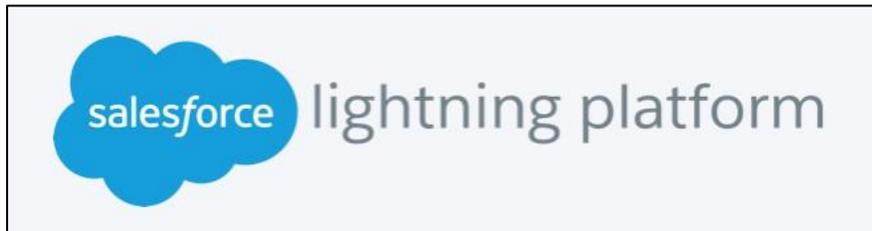
1. Signup for free Salesforce Developer account (optional).
2. Salesforce: Create a Skill.
3. Salesforce: Create Online and Offline buttons (optional).
4. Salesforce: Create Chat Button Scripts.
5. Salesforce: Create a Site.
6. Salesforce: Get the Live Agent Script Tags.
7. Salesforce: Create a new Agent.
8. Salesforce: Setup Deployment
9. Salesforce: Create a Salesforce Application.
10. Salesforce: Switch the Live Agent on and off line.
11. Implement Live Agent in Crownpeak DXM Templates.

Setting up Salesforce

Note, in this tutorial we will use a free Salesforce Development account to demonstrate the steps. You can use the steps in this tutorial and apply them to your organisation's Salesforce account. If you are following this tutorial in your organisation's enterprise or sandbox account, then you can skip the next step.

1. Sign up for a free Salesforce Development account:

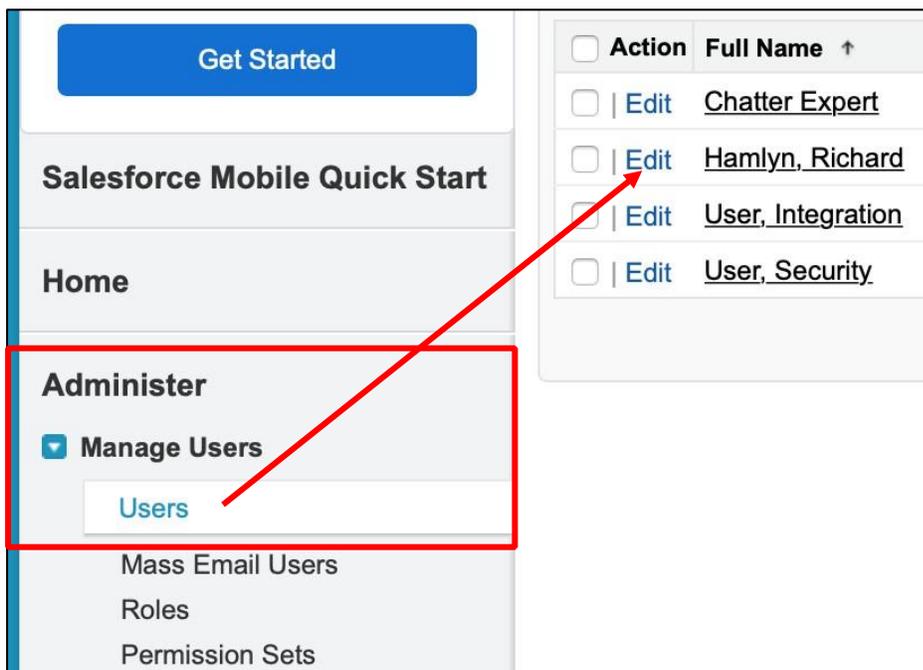
<https://developer.salesforce.com/signup>



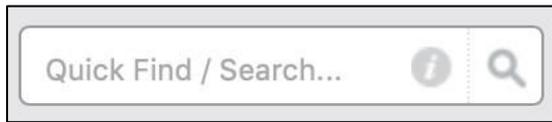
2. Login to your account.

Create a Live Agent Skill to direct chat requests to the correct Agent.

1. In Salesforce, go to **My Development Account**.
2. Open the users account that you want to act as an Agent.
Administer -> Manage Users -> Users -> Edit

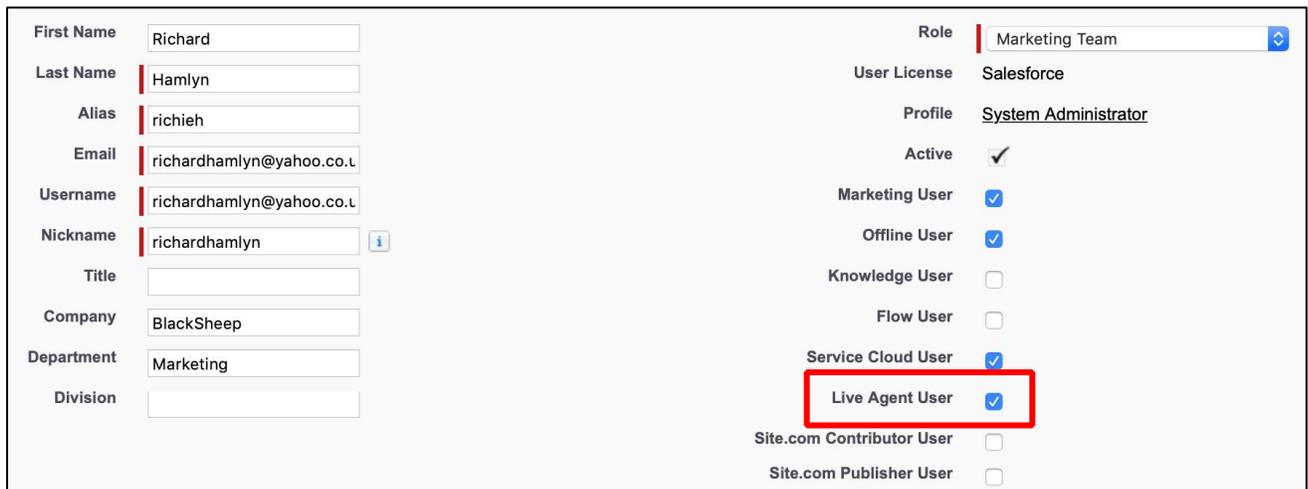


Note, you may also use the Quick Find box to locate the menu option you require at any time:



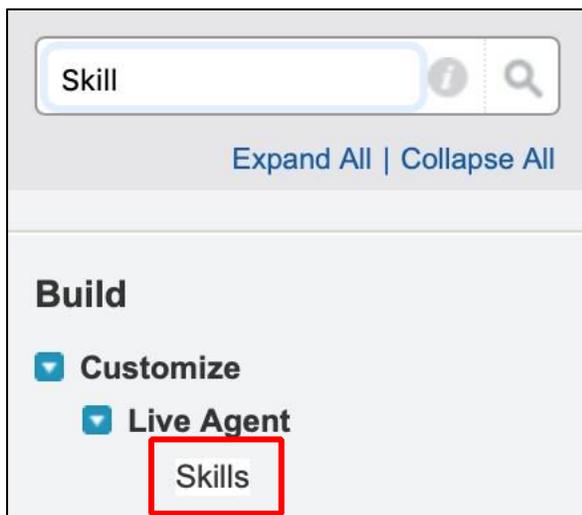
Type 'Users' in the above and the menu option will be found.

3. Once you have selected the desired agent's user account, switch on the option for them to access the function in Salesforce.



First Name	Richard	Role	Marketing Team
Last Name	Hamlyn	User License	Salesforce
Alias	richieh	Profile	System Administrator
Email	richardhamlyn@yahoo.co.uk	Active	<input checked="" type="checkbox"/>
Username	richardhamlyn@yahoo.co.uk	Marketing User	<input checked="" type="checkbox"/>
Nickname	richardhamlyn	Offline User	<input checked="" type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company	BlackSheep	Flow User	<input type="checkbox"/>
Department	Marketing	Service Cloud User	<input checked="" type="checkbox"/>
Division		Live Agent User	<input checked="" type="checkbox"/>
		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>

4. Save the user profile.
5. In the Quick Find box, type 'Skill'.



6. Click on **'Skills'**.
7. In the Skills window, click on **'New'**.

Basic Information

Name

Developer Name

Description

Assign Users

Select the users that have this skill. (Live Agent only)

Find Users

Available Users

Add



Remove

Selected Users

Richard Hamlyn

Assign Profiles

Select the profiles that have this skill. (Live Agent only)

Available Profiles

Analytics Cloud Integration User
Analytics Cloud Security User
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Support Profile
Force.com - App Subscription Use

Add



Remove

Selected Profiles

Contract Manager
Custom: Sales Profile

Note, you will only see users that have the Live Agent check box selected in their profile in the Available Users box. We did this in the previous step.

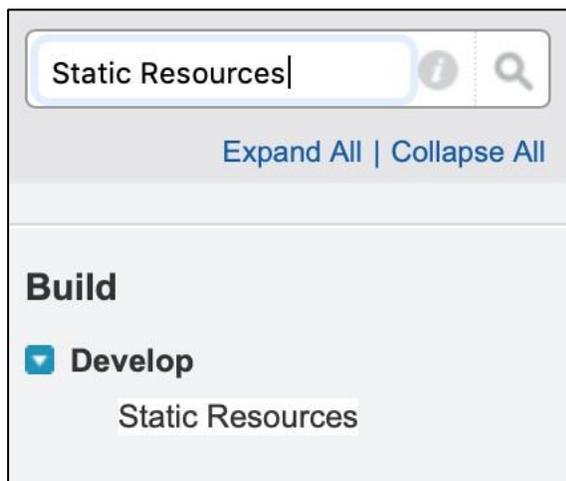
Your Profile list may be different to the one above as it will be specific to your organisation. You should select the profiles that the selected user/s will map to. For example, if you have a Live Agent who will look after technical support then this could be a profile.

8. Save the Skill.

Create your chat button in Salesforce (optional)

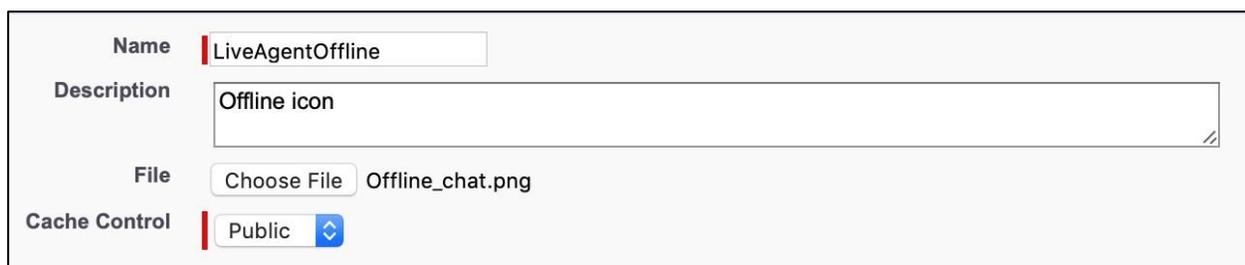
Note, this step is optional as you can apply your own buttons in Crownpeak DXM later if you would prefer to give the editorial team the option to change the button choice.

1. In the Quick Find bar enter '**Static Resources**'.



2. Open Static Resources.

3. Click on '**New**'.



4. Upload an offline button of your choice from your local desktop and save the resource.

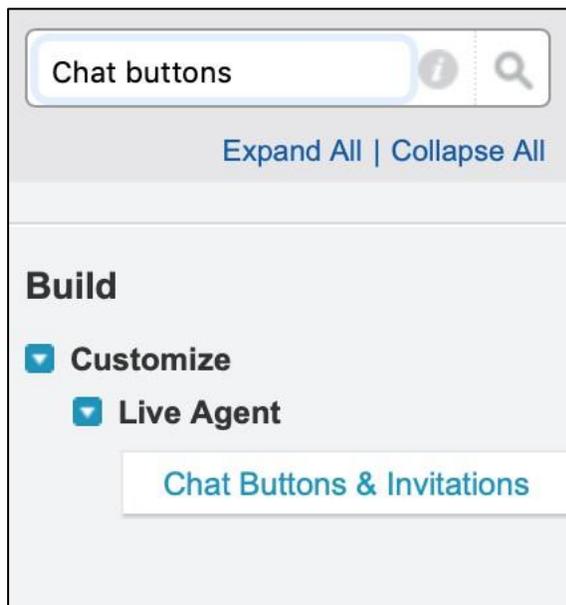
5. Now repeat this step for an online button.

Action	Name	Namespace Prefix	Description	MIME Type
Edit Del	LiveAgentOffline		Offline icon	image/png
Edit Del	LiveAgentOnline		Online icon	image/png

You now have two buttons available for your site to show when an agent is online and offline. These buttons will be fetched by the imported JavaScript that you will create later in this tutorial.

Create scripts to run your online and offline status on your site.

1. In the Quick Find box enter '**Chat buttons**'.



2. Open **Build** -> **Customize** -> **Live Agent** -> **Chat Buttons & Invitations**.
3. Complete the following details:

Basic Information.

Basic Information

The chat button settings you specify on this page are used to generate the button code, which appears after you click Save.

Type  Chat Button 

Name  Account Live Chat

Developer Name  Account_Live_Chat

Language  English 

Enable Customer Time-Out 

Customer Time-Out (seconds) 

4. **Routing Information.** To guide the site visitor to the Agent with skills to address their matter.

Routing Information

Routing Type  Least Active 

Skills 

Available Skills		Selected Skills
BlackSheep LiveAgent	Add 	Accounts
	Remove 	

Push Time-Out (seconds) 

Enable Queue 

Queue Size Per Agent 

5. **Chat Button Customization.** Optional, assign the buttons uploaded previously to Salesforce to be used on the site. Note, you can also define other options, such as a Pre-chat Form (which you can use to generate an instant lead in Salesforce) and Post conversation URLs (to direct customers to where you want them to go after a chat session is complete i.e. a survey) etc.

Chat Button Customization

You can customize your chat button by choosing online and offline chat images and manually modify the chat button code on the next page.

Site for Resources	<input type="text" value="BlackSheep"/>		
Online Image	<input type="text" value="LiveAgentOnline"/>		
Offline Image	<input type="text" value="LiveAgentOffline"/>		
Custom Chat Page	<input type="text"/>		
Pre-Chat Form Page	<input type="text"/>		

6. Save the Chat Button options.

Note, you will need a Site selected before you can save. If you do not have a site defined in Salesforce, then apply the following steps to create a site placeholder.

7. Create a Site by entering 'Site' in the Quick Find box or navigating to **Build -> Develop -> Sites**

Site Edit
BlackSheep

Site Edit Save Cancel

Site Label

Site Name

Site Description

Site Contact

Default Web Address

Active

Active Site Home Page [\[Preview\]](#)

Inactive Site Home Page [\[Preview\]](#)

Site Template

Site Robots.txt

Site Favorite Icon

Analytics Tracking Code

URL Rewriter Class

Enable Feeds

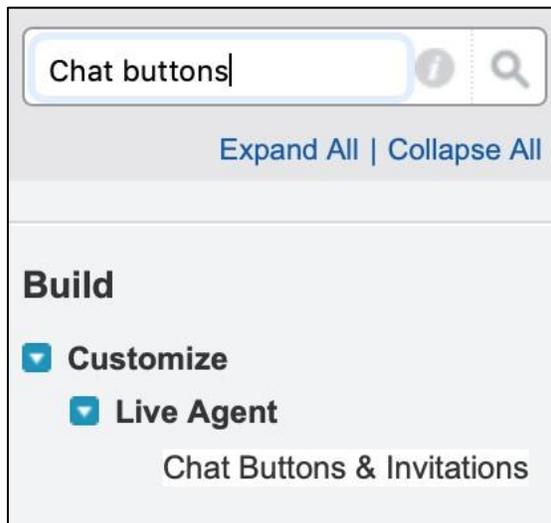
Clickjack Protection Level

Require Secure Connections

8. Complete the requisite entries in the Site similar to those shown above.
Note, the details of the site, for this tutorial, are not important as we will not use this site. In essence, it is a placeholder only and we will apply the site in Crownpeak DXM.
9. Save the site.

Get the Script for loading the buttons in your site.

1. In the Quick Find box type 'Chat buttons' and open **Build -> Customize -> Live Agent -> Chat Buttons and Invitations.**



2. Open your Chat Button and Invitation created previously.
3. Scroll to the bottom and you will see your Chat Button Code Script, copy this script to Notepad for later use.

Chat Button Code

Place this code into your site's HTML where you want the chat button to appear. Copy and paste this code again each time you edit the button.

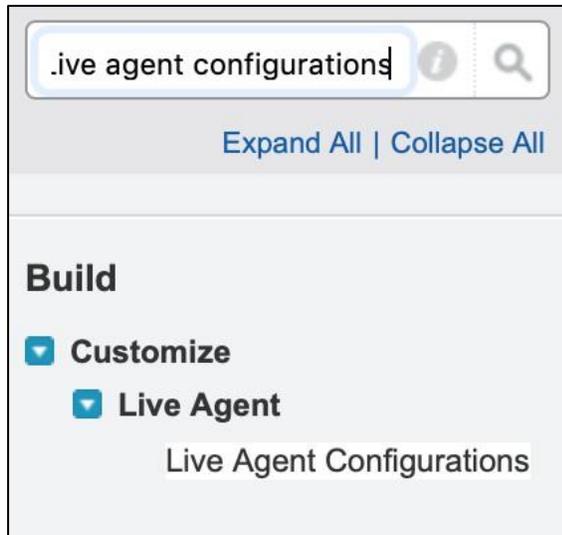
```

<script type="text/javascript">
if (!window._laq) { window._laq = []; }
window._laq.push(function(){liveagent.showWhenOnline('5731v0000008gLS',
document.getElementById('liveagent_button_online_5731v0000008gLS')});
liveagent.showWhenOffline('5731v0000008gLS', document.getElementById('liveagent_button_offline_5731v0000008gLS'));
```

4. Save the Script on your desktop for later use.

Create a new Agent

1. In the Quick Find box enter '**Live agent configurations**'.



2. Open **Live Agent Configurations**.
3. Setup the client to your needs. In this example, the default set up was used.

User Configuration Settings
Save Cancel

Basic Information

Live Agent Configuration Name

Developer Name

Chat Capacity

Sneak Peek Enabled

Request Sound Enabled

Disconnect Sound Enabled

Notifications Enabled

Custom Agent Name

Auto Greeting

Merge fields are available for Custom Agent Name and Auto Greeting fields.

Auto Away on Decline

Auto Away on Push Time-Out

Critical Wait Alert Time (seconds)

Agent File Transfer Enabled

Visitor Blocking Enabled

Assistance Flag Enabled

Assign Users

Select the Live Agent users for this configuration. User-level configurations override profile-level configurations.

Find Users

Available Users	Add	Selected Users
	▶	Richard Hamlyn
	◀	

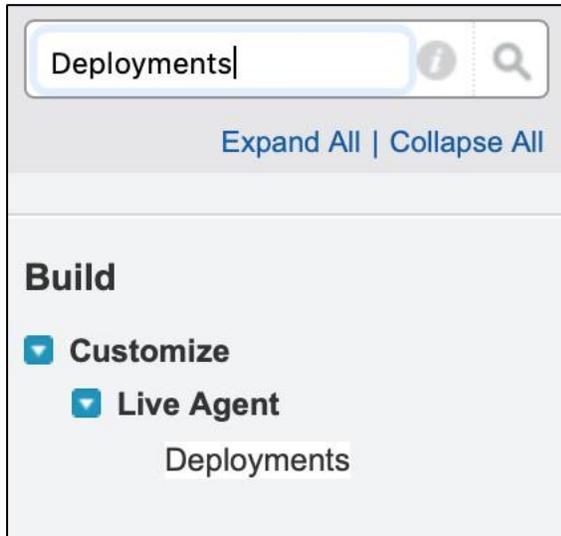
Note, in the above configuration, you can setup how your Live Agent will function whilst in session. You can find more details here:

https://help.salesforce.com/articleView?id=live_agent_configuration_settings.htm&type=5

4. Save the Live Agent Configuration.

Setup your Live Agent Deployment

1. In the Quick Find box type '**Deployments**'



2. Open **Build -> Customize -> Live Agent -> Deployments**.
3. Create your Live Agent Deployment and Save.

A screenshot of a configuration form for a Live Agent Deployment. The form has several fields and checkboxes:

- Live Chat Deployment Name**: Deploy BlackSheep
- Developer Name**: Deploy_BlackSheep
- Chat Window Title**: Live Agent
- Allow Visitors to Save Transcripts**:
- Allow Access to Pre-Chat API**:
- Permitted Domains**: (empty text box)
- Enable Custom Timeouts**:

4. Open the Live Agent Deployment.
5. Copy the Script Tags to Notepad on your desktop for later use.

Deployment Code

Copy this code and paste it into each web page where you want to deploy Live Agent.

```
<script type='text/javascript' src='https://c.la1-c1-fra.salesforceliveagent.com/content/g/js/44.0/deployment.js'></script>
<script type='text/javascript'>
liveagent.init('https://d.la1-c1-fra.salesforceliveagent.com/chat', '5721v0000008jYF', '00D0Y000000ZAbf');
</script>
```

Note, the deployment JavaScript that will control Live Agent functionality on your site will be stored in Salesforce and accessed through the Deployment Code.

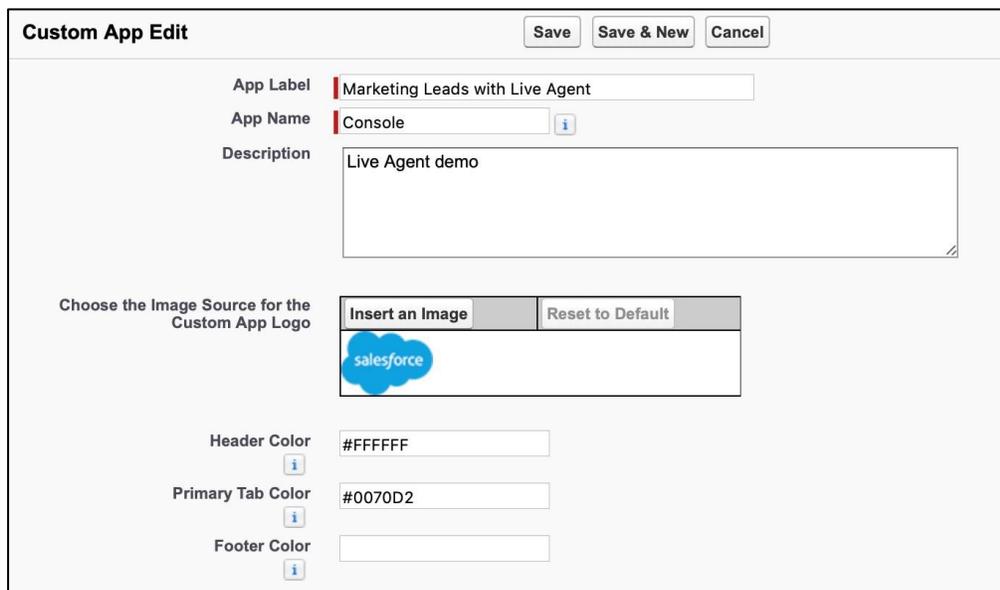
Whilst you could download and rebuild the JavaScript in your local web application, this is not recommended as the functionality is dynamic and using the method above will ensure future updates to your deployment's functionality will automatically be applied to your site.

Create a Salesforce App to provide a communication channel to your Live Agent function

1. In the Quick Find box type '**Apps**' and select **Build -> Create -> Apps**.
2. Click the '**New**' button.



3. Create your App using the default settings

A screenshot of the "Custom App Edit" form in Salesforce. The form has a title bar with "Custom App Edit" and three buttons: "Save", "Save & New", and "Cancel". The form contains several fields: "App Label" with the value "Marketing Leads with Live Agent", "App Name" with the value "Console" and an information icon, and "Description" with the value "Live Agent demo". Below these fields, there is a section for "Choose the Image Source for the Custom App Logo" with two buttons: "Insert an Image" and "Reset to Default". A preview of the logo shows the Salesforce logo. At the bottom, there are three color selection fields: "Header Color" with the value "#FFFFFF", "Primary Tab Color" with the value "#0070D2", and "Footer Color" which is currently empty.

Map your Salesforce data that you want to associate with Live Agent. In this example, we are linking the chat to Lead generation only.

Available Items

- Goals
- Metrics
- App Launcher*
- User Provisioning Requests*
- Streaming Channels*
- Duplicate Record Sets*
- Macros
- Feedback*
- Profile Feedback*
- Performance Cycles*
- Assets*
- List Emails*
- Leads
- Cases

Add

▶

Remove

◀

Selected Items

Leads

Top

▲

Up

▲

Down

▼

Bottom

The chat workspace lets Live Agent users chat with customers, find existing records related to chats, and create new records based on incoming chats. Each new chat session opens as a primary tab in a console with the Details page as a default subtab. You can open other records or pages as subtabs.

Choose the records or pages to open as subtabs of each chat session:

- New case
- New lead
- New account
- New contact
- New Visualforce page

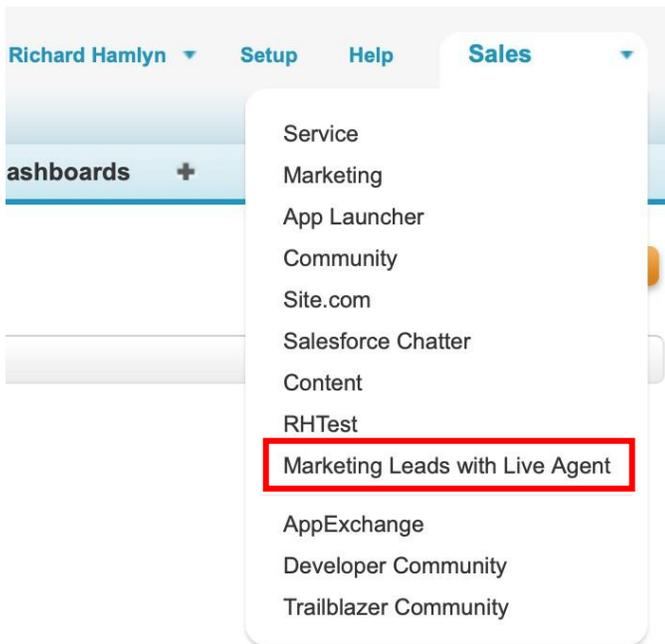
Save..

Salesforce Live Agent is now setup and ready to be used in your site/s.

You can switch on Live Agent to reflect the status in your site once we deploy the coded scripts you have saved in Notepad on your desktop.

Continued...

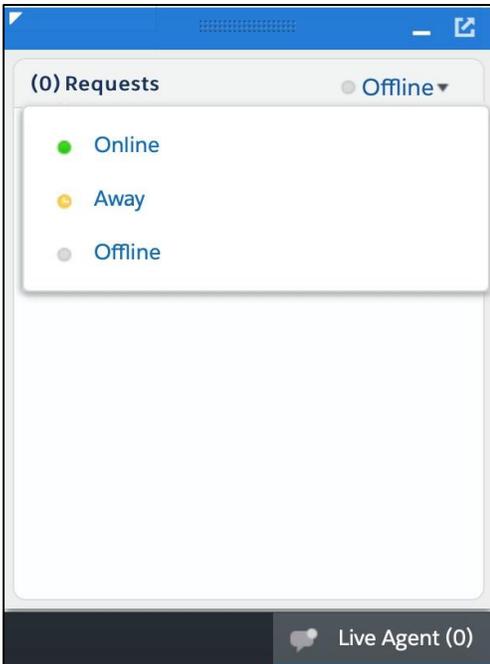
To access Live Agent, login as a user you defined as being a Live Agent. In the top right menu switch to your App. For example, **'Marketing Leads with LiveAgent'** that we created above.



At the bottom right of your new window you will see the Live Agent button. Click this button.



Set your Live Agent status to **'Online'**.



Implementing Live Agent in Crownpeak DXM

1. Open your instance of Crownpeak DXM
2. Create a new template and open the output.aspx.
3. Add the Button Code to your template from the saved code in Notepad on your desktop:

```
<script type="text/javascript"> if (!window._laq) { window._laq = []; } window._laq.push(function() {liveagent.showWhenOnline('5731v0000008gLS', document.getElementById('liveagent_button_online_5731v0000008gLS')); liveagent.showWhenOffline('5731v0000008gLS', document.getElementById('liveagent_button_offline_5731v0000008gLS')); });</script>
```

4. At the end of your template, add your Deployment Script tags.

```
<script type='text/javascript' src='https://c.la1-c1-fra.salesforceliveagent.com/content/g/js/44.0/deployment.js'></script><script type='text/javascript'>liveagent.init('https://d.la1-c1-fra.salesforceliveagent.com/chat', '5721v0000008jYF', '00D0Y000000ZAbf');
```

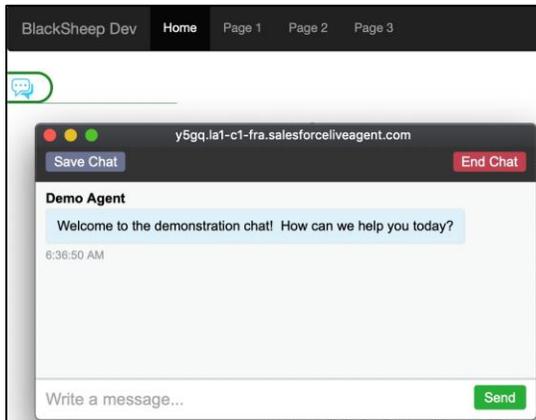
</script>

5. Save the template and select Preview.

Note, you can add your HTML and Content Managed Fields as required.

6. You will see the button loads from Salesforce and is set to show the Offline button.

7. If you now set Live Agent to 'Online' in Salesforce you will see the Online button become active in your page and you can start the chat. You may need to refresh the view to see the updated status



Further considerations

Here is an example template, with a standard Bootstrap design, that uses editor imported buttons from CMS:

<https://github.com/richardhamlyn/dxm-templates/blob/master/liveagent-output>

<https://github.com/richardhamlyn/dxm-templates/blob/master/liveagent-input>

Note, you could also give your editors the option to change the buttons:

Example of Online button

```
<a class="button_bLeft slidebbtn" id="button_bLeft"
onclick="liveagent.startChat('5731v0000008gLS')">"
width="25"></a>
```

Input.aspx add:

```
Input.ShowHeader("Widget Options");  
Input.ShowAcquireImage("LiveAgent Image", "la_image");
```

Now editors can change the button for the online menu.

Note, do not change the onclick event call!