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 enterprsie or sandbox account, then you can skip the next step.

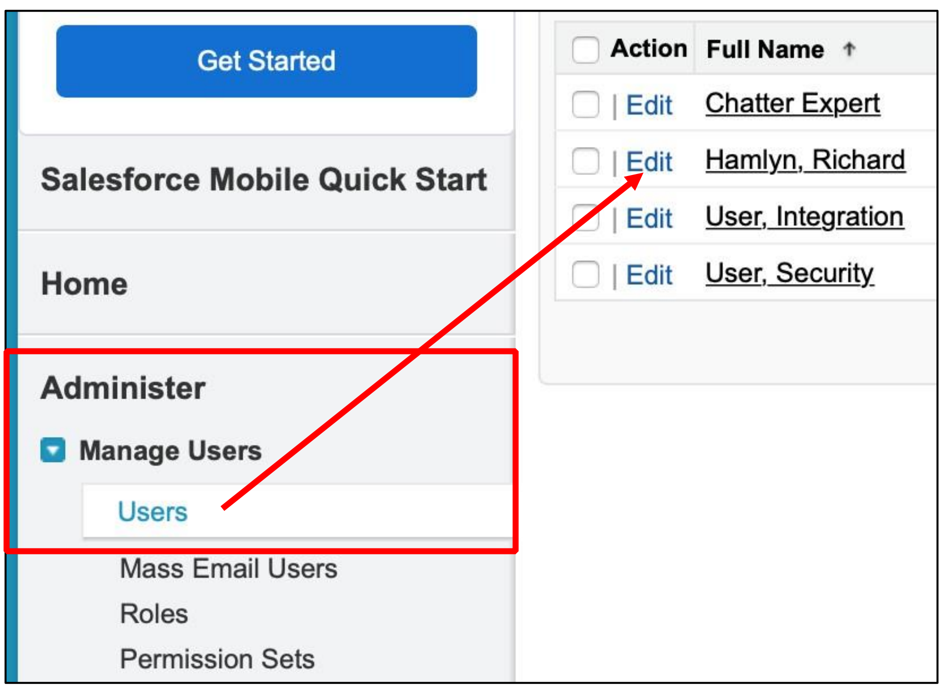
1. Sign up for a free Salesforce Development account: https://developer.salesforce.com/signup

salesforce lightning platform

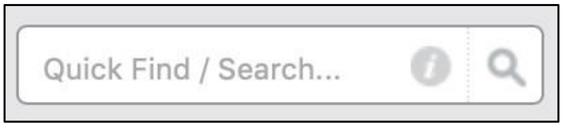
2. Login to your account.

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



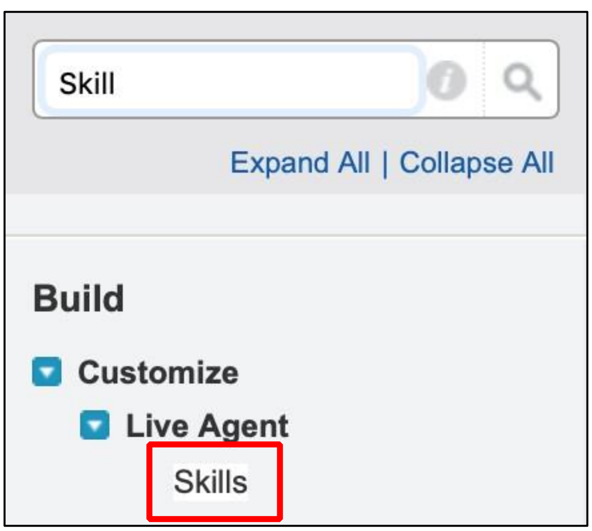
Note, you may also use the Quick Find box to locate the menu option you require at any time:



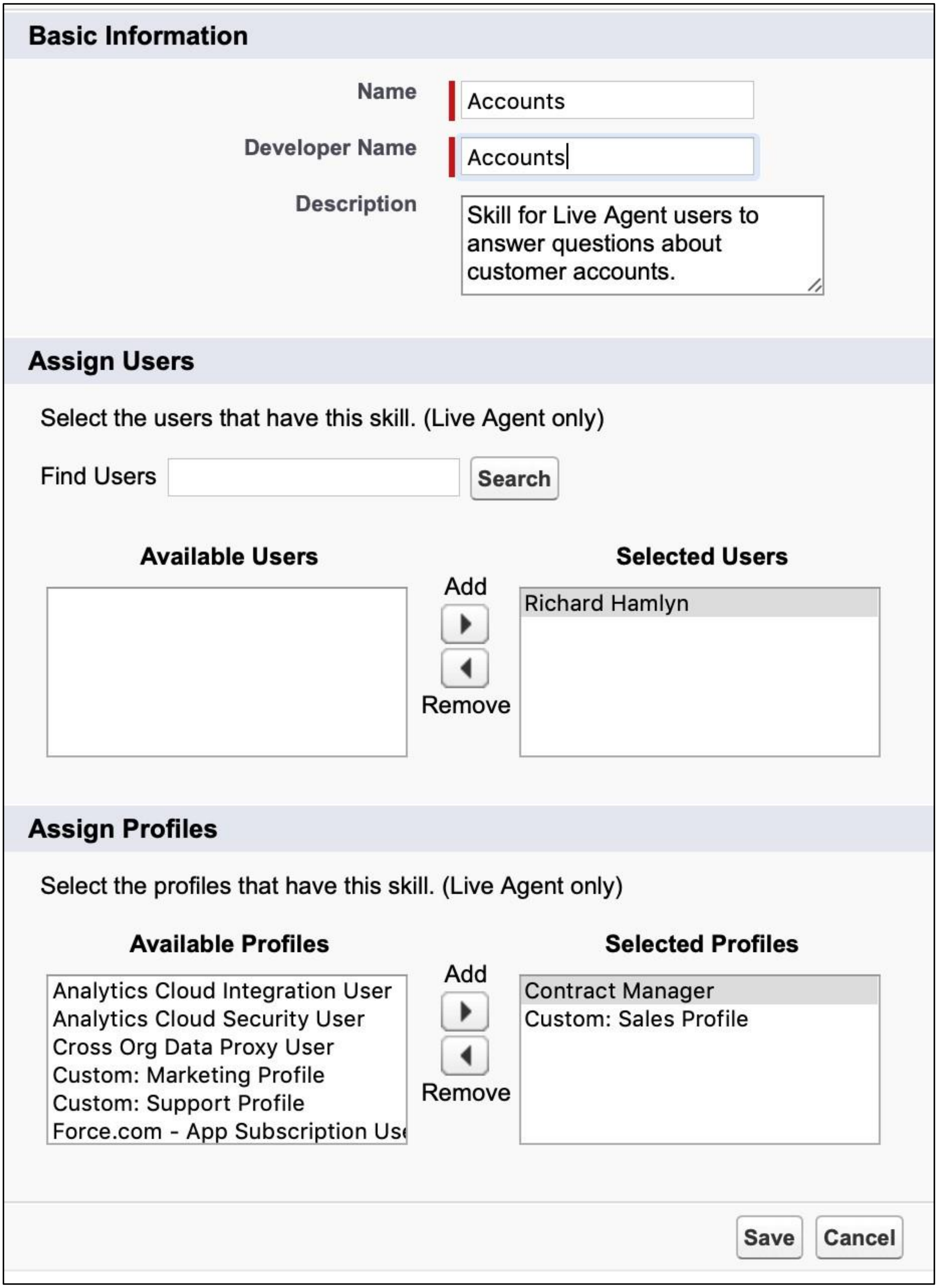
Type ‘**Users**’ in the above and the menu option will be found.

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

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
Accounts
Developer Name
Accounts
Description
Skill for Live Agent users to answer questions about customer accounts.
Assign Users
Select the users that have this skill. (Live Agent only)
Find Users
Search
Available Users
Selected Users
Add
Remove
Richard Hamlyn
Assign Profiles
Select the profiles that have this skill. (Live Agent only)
Available Profiles
Selected Profiles
Analytics Cloud Integration User
Analytics Cloud Security User
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Support Profile
Add
Remove
Contract Manager
Custom: Sales Profile
Save
Cancel

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.

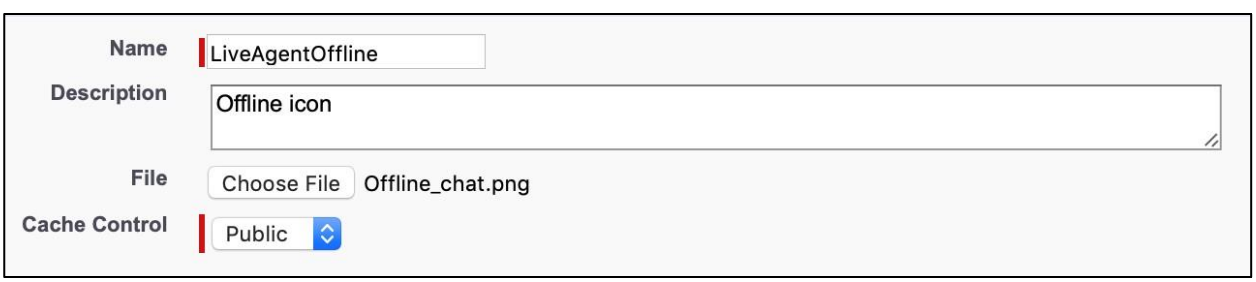
8. Save the Skill.

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 Reources**’.

2. Open Static Resources.
3. Click on ‘**New**’.



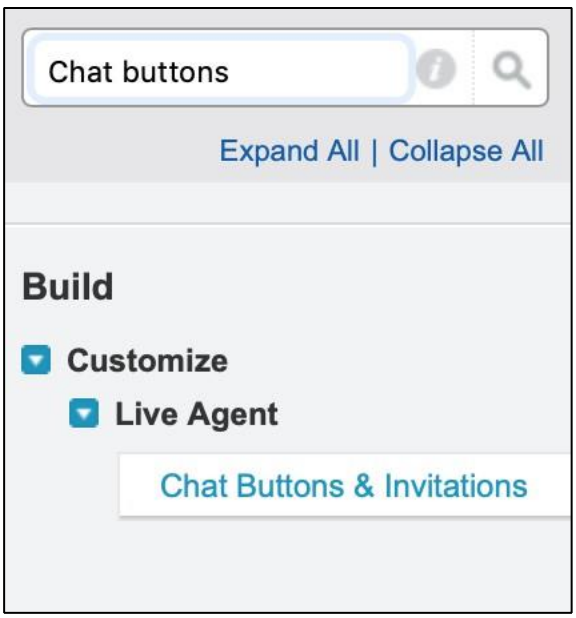
4. Upload an offline button of your choice from your local desktop and save the resource.
5. Now repeat this step for an online button.

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.

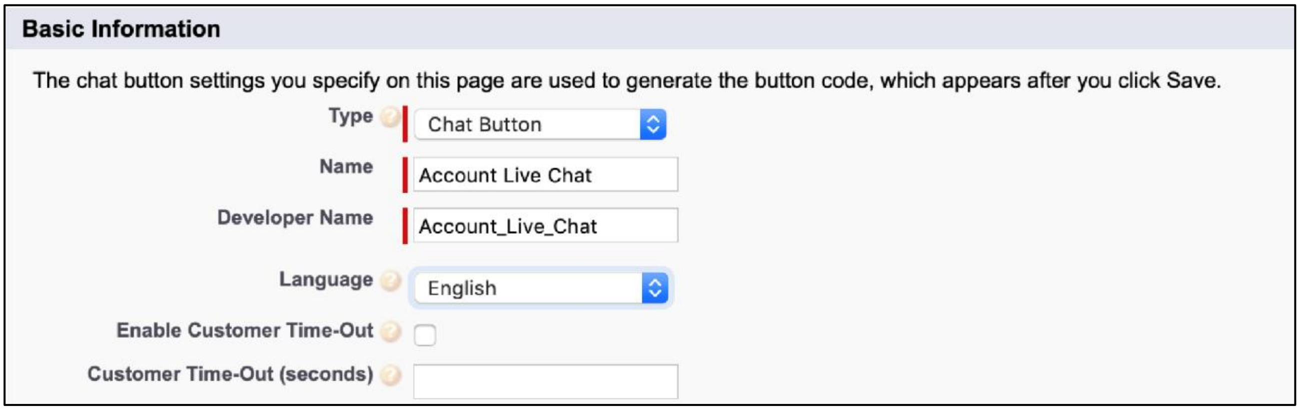
Create scripts to run your online and offline status on your site.

1. In the Quick Find box enter ‘**Chat buttons**’.

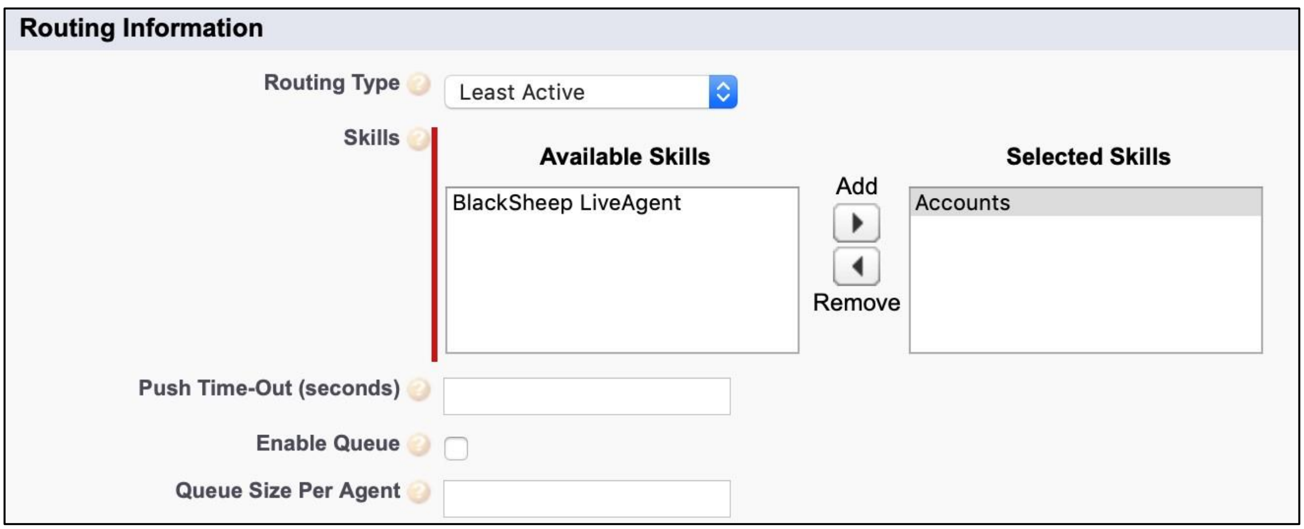


2. Open **Build -> Customize -> Live Agent -> Chat Buttons & Invitations.**
3. Complete the following details:

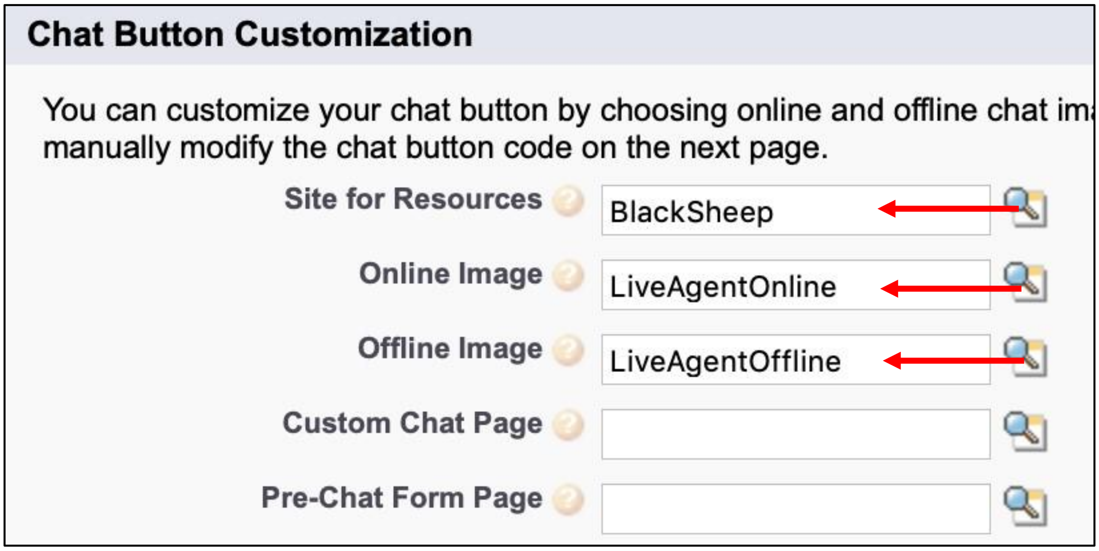
Basic Information.



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



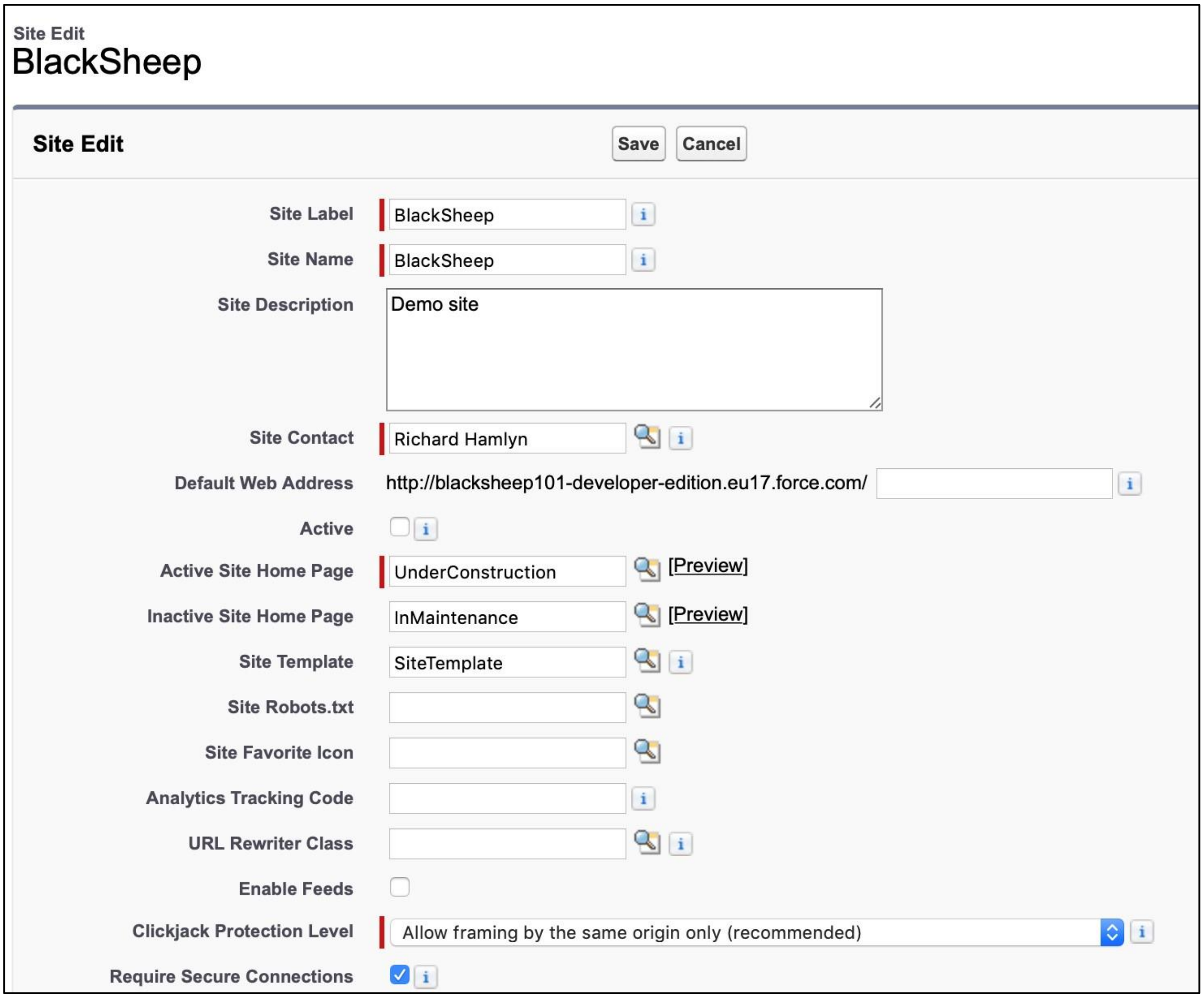
5. **Chat Button Customization.** Optional, assign the buttons uploaded previously to Salesforce to be used on the site. Note, you can also define other options, such as a Pre-chat Form (which you can use to generate an instant lead in Salesforce) and Post conversation URLs (to direct customers to where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



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.

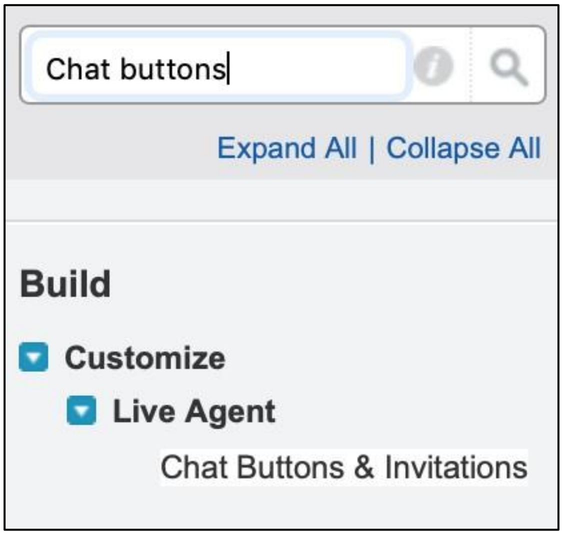
7. Create a Site by entering '**Site**' in the Quick Find box or navigating to **Build -> Develop -> Sites**



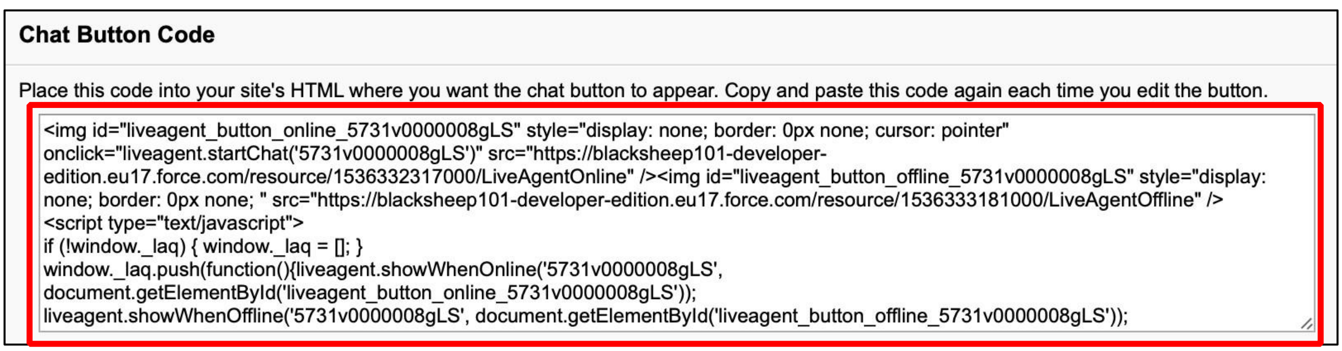
8. Complete the requisite entries in the Site similar to those shown above.
   Note, the details of the site, for this tutorial, are not important as we will not use this site. In essence, it is a placeholder only and we will apply the site in Crownpeak DXM.
9. Save the site.

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.**



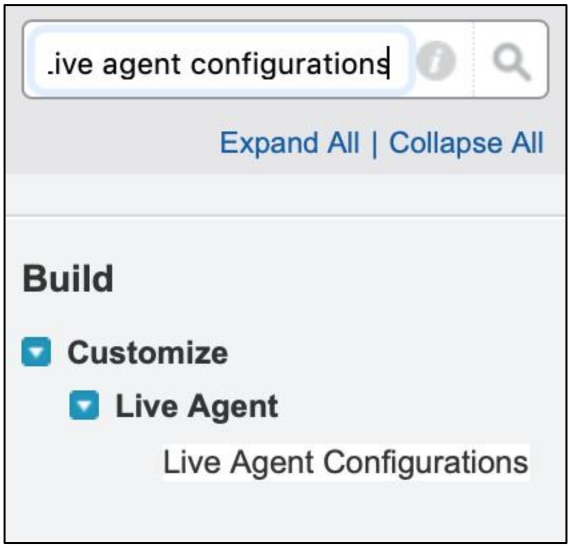
2. Open your Chat Button and Invitation created previously.
3. Scroll to the bottom and you will see your Chat Button Code Script, copy this script to Notepad for later use.



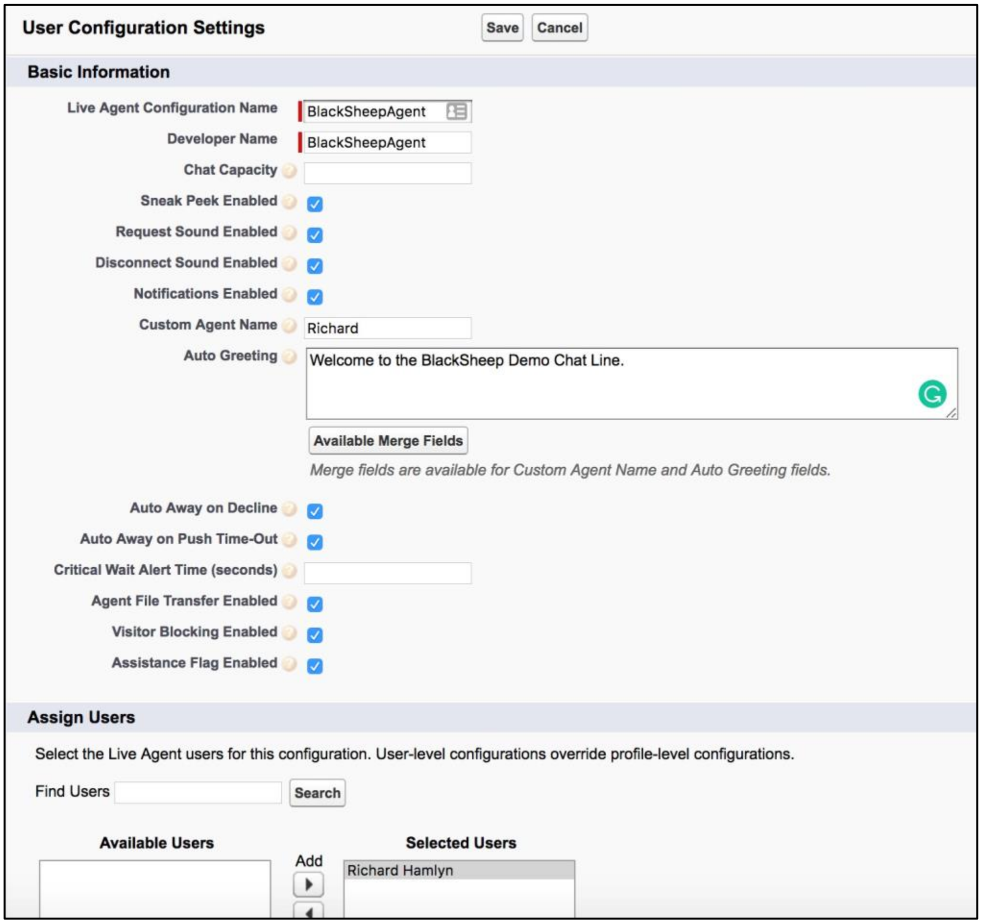
4. Save the Script on your desktop for later use.

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.



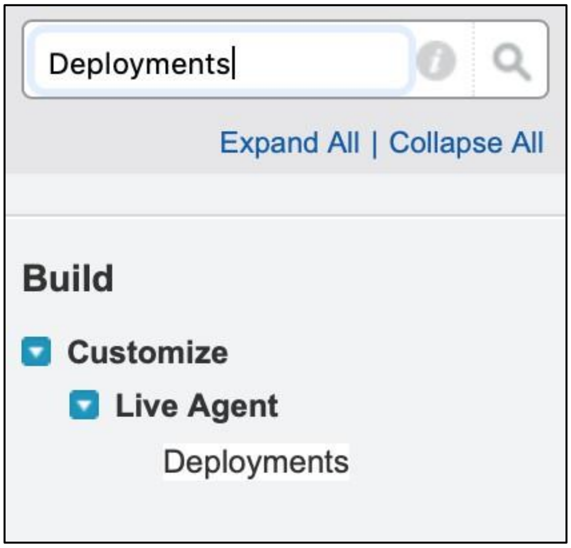
Note, in the above configuration, you can setup how your Live Agent will function whilst in session. You can find more details here:

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

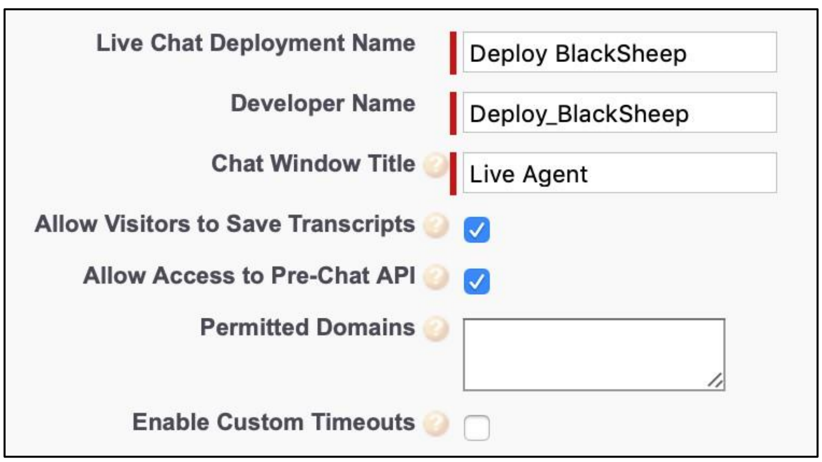
4. Save the Live Agent Configuration.

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.



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

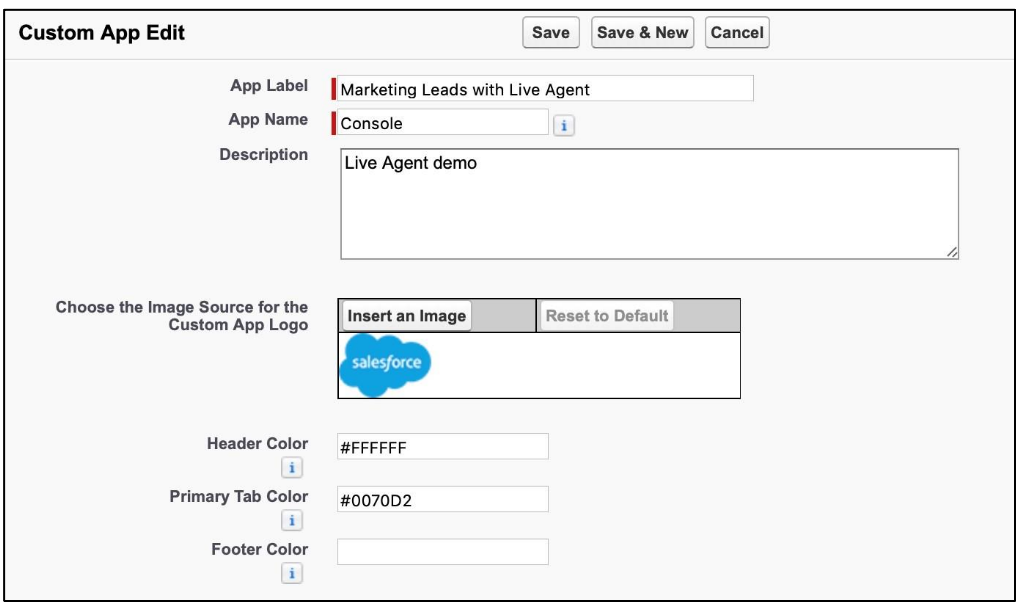
Note, the deployment JavaScript that will control Live Agent functionality on your site will be stored in Salesforce and accessed through the Deployment Code.

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.

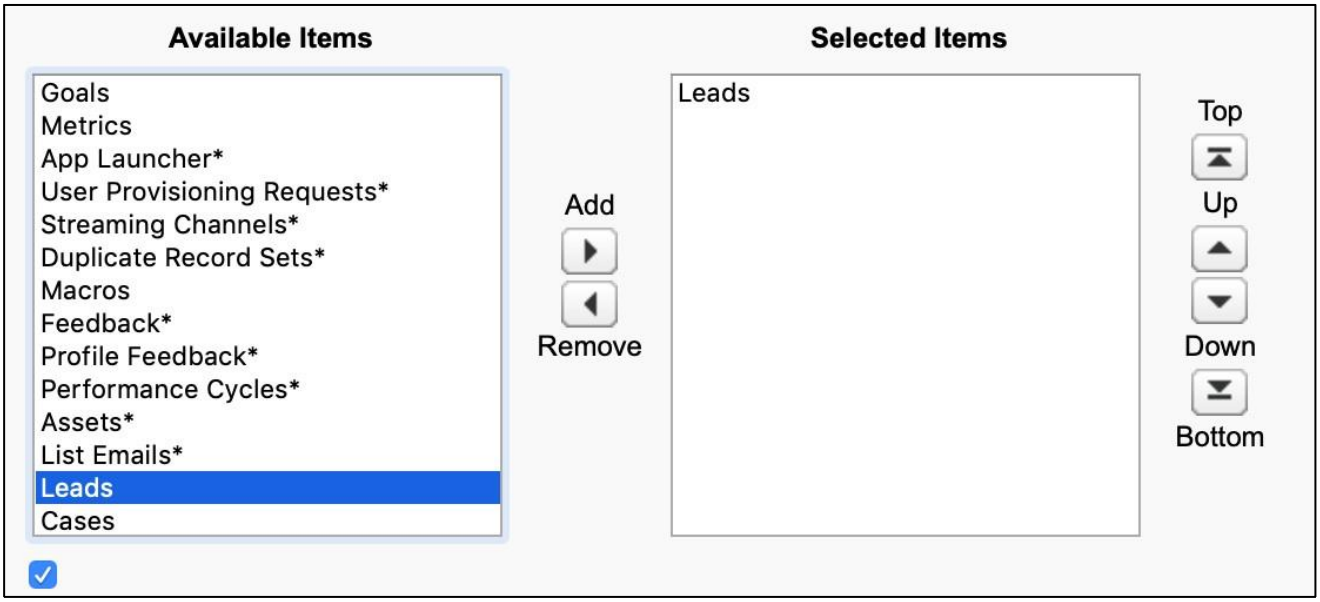
Create a Salesforce App to provide a communication channel to your Live Agent function

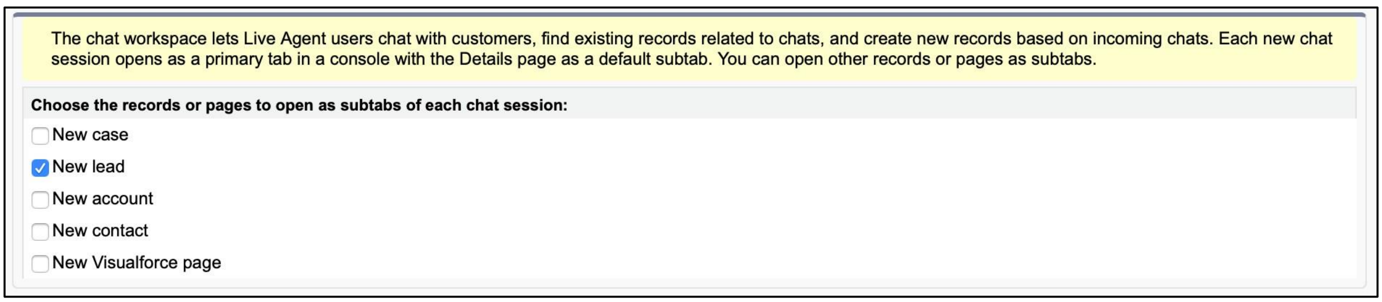
1. In the Quick Find box type ‘**Apps**’ and select **Build -> Create -> Apps**.
2. Click the ‘**New**’ button.

3. Create your App using the default settings



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





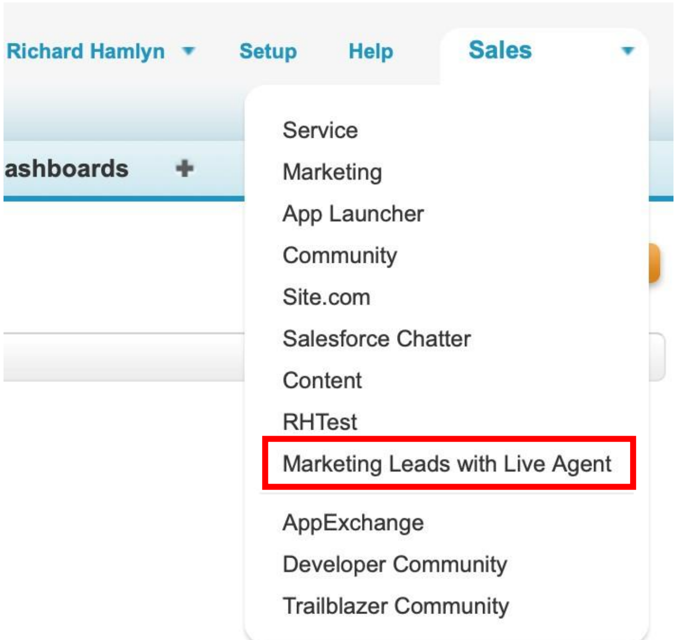
Save..

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

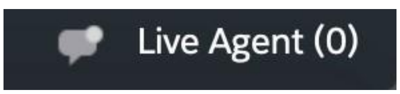
You can switch on Live Agent to reflect the status in your site once we deploy the coded scripts you have saved in Notepad on your desktop.

Continued…

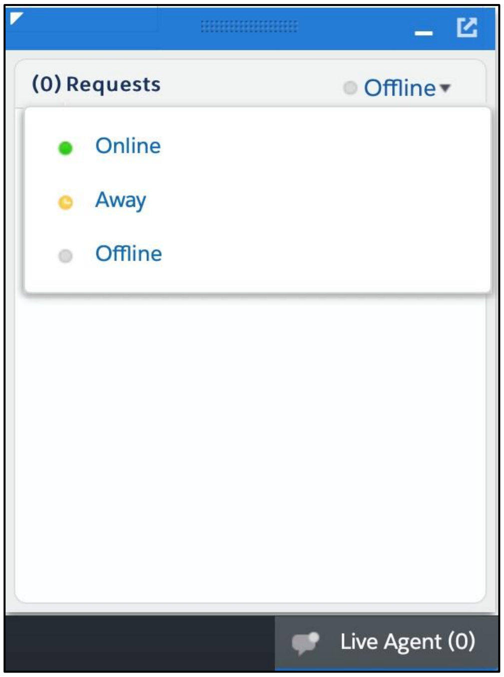
To access Live Agent, login as a user you defined as being a Live Agent. In the top right menu switch to your App. For example, '**Marketing Leads with LiveAgent**' that we created above.



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:

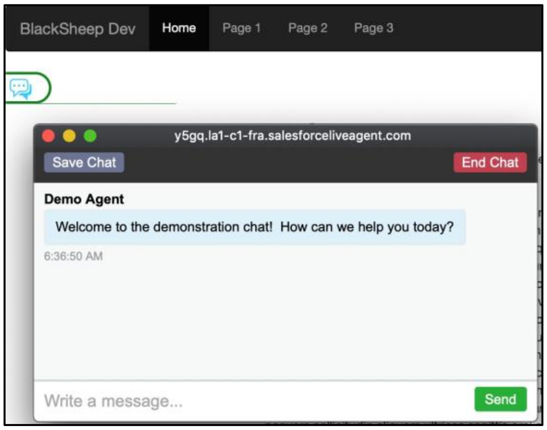
```
<img id="liveagent_button_online_5731v0000008gLS" style="display: none; border: 0px
none; cursor: pointer" onclick="liveagent.startChat('5731v0000008gLS')"
src="https://blacksheep101-developer-
edition.eu17.force.com/resource/1536332317000/LiveAgentOnline" /><img
id="liveagent_button_offline_5731v0000008gLS" style="display: none; border: 0px none;
" src="https://blacksheep101-developer-
edition.eu17.force.com/resource/1536333181000/LiveAgentOffline" />
<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

<img src="<%= asset["la_image"]%>" width="25">

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!