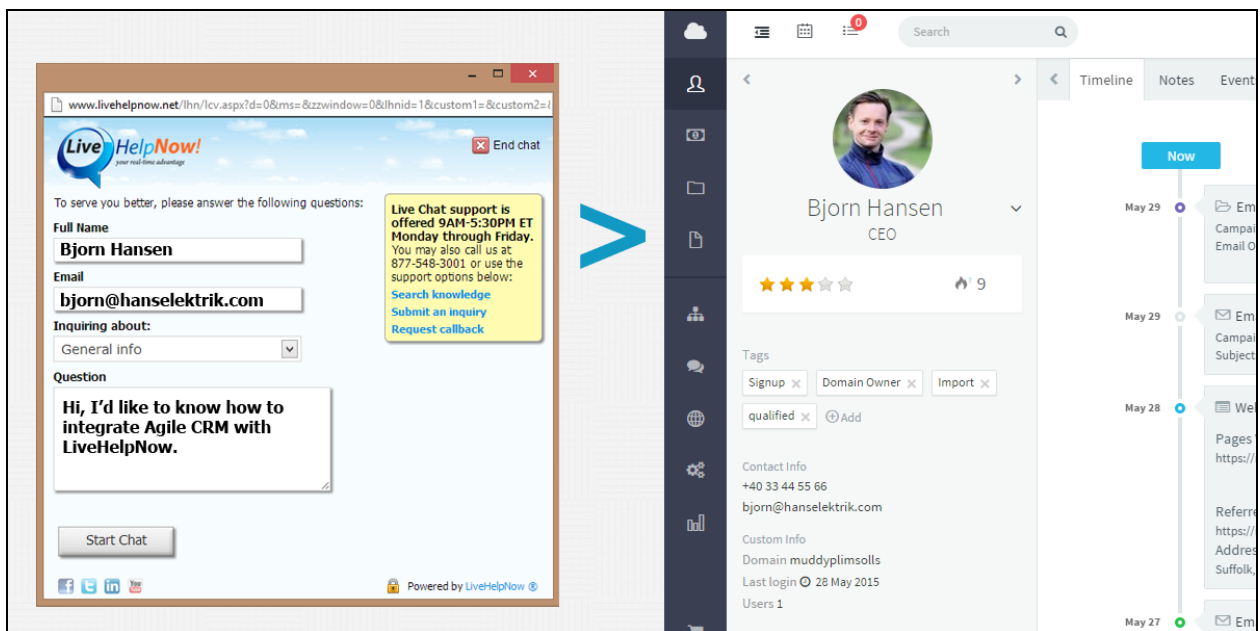


Setup LiveHelpNow to work with Agile CRM

Agile CRM can be easily integrated with many applications/service providers that collect customer information. This customer information can be pushed into Agile's contact database as a new contact. This allows efficient gathering of leads and setting up campaign-ready contacts for further communication, relationship building or marketing.

LiveHelpNow is a live support software that bundles live chat, email ticketing, calling and a knowledge base into a system that can be added to any website. New customers looking for support or assistance can easily find someone to talk to.

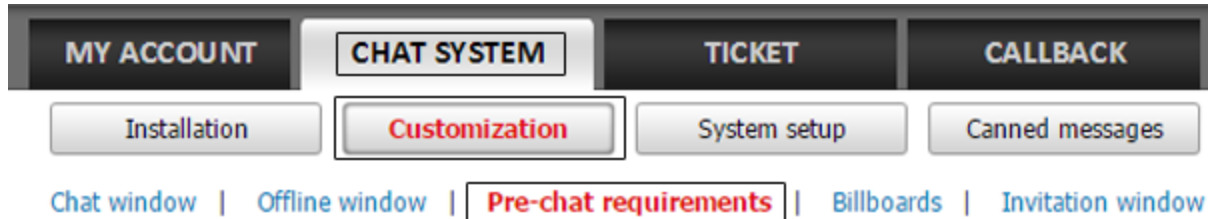


When LiveHelpNow is integrated with Agile CRM, any new visitors taking support with LiveHelpNow are pushed to Agile CRM as new contacts. This makes lead collection much easier and allows your business to focus purely on the next steps of communications with new contacts.

This guide is an easy step-by-step guide on how to integrate Agile CRM with LiveHelpNow.

Step 1: Pre-Chat Information Settings are details that are collected before a visitor begins a support request. The Pre-Chat Requested Information Settings is located at *Admin->Chat System->Customization->Pre-Chat requirements*.

Choose the details you would need to collect from a visitor in the Input Label section. Against it, map it to the field it should show up under Agile CRM.



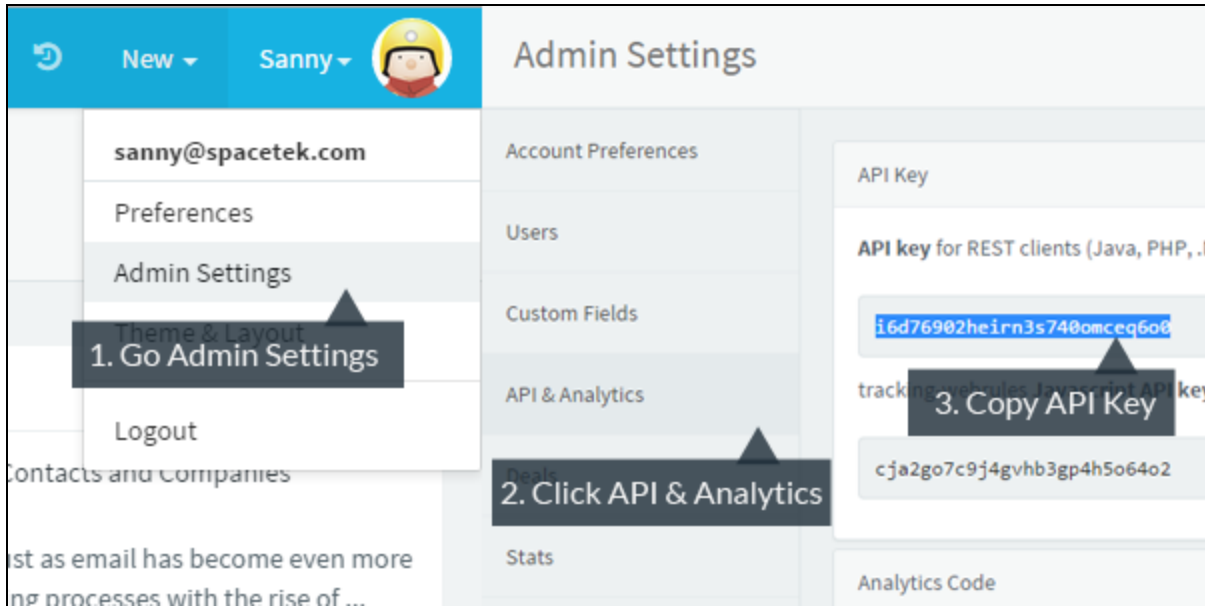
Pre-Chat Requested Information

To delete a field, please erase its label and click [Save Settings] button

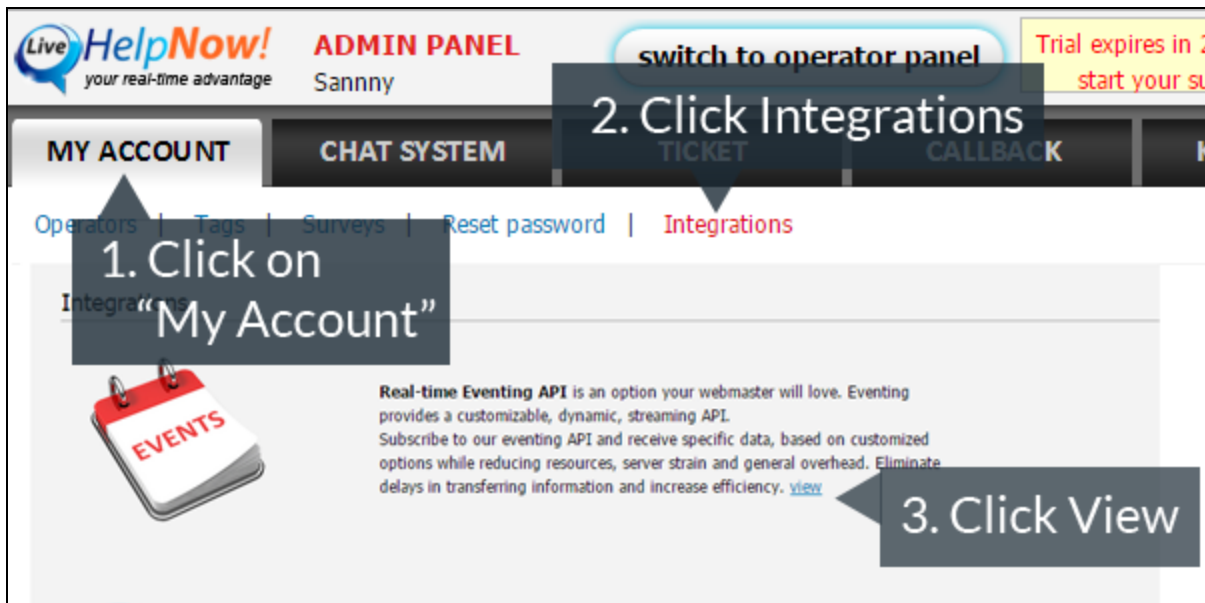
Input label	Required	Field type	Drop down list values (Separated by semicolon ';')	Map to CRM field (for CRM integration)
<input type="text" value="First Name"/>	yes ▼	<input checked="" type="radio"/> Text Box <input type="radio"/> Dropdown list <input type="radio"/> Department List <input type="radio"/> Multiline Text Box		<input type="text" value="First Name"/>
<input type="text" value="Email"/>	yes ▼	<input checked="" type="radio"/> Text Box <input type="radio"/> Dropdown list <input type="radio"/> Department List <input type="radio"/> Multiline Text Box		<input type="text" value="EMail"/>
<input type="text"/>	No ▼	<input checked="" type="radio"/> Text Box <input type="radio"/> Dropdown list <input type="radio"/> Department List <input type="radio"/> Multiline Text Box		<input type="text" value="Do not map to a field"/>
<input type="text"/>	No ▼	<input checked="" type="radio"/> Text Box <input type="radio"/> Dropdown list <input type="radio"/> Department List <input type="radio"/> Multiline Text Box		<input type="text" value="Do not map to a field"/>

[Restore defaults](#)

Step 1: Login to Agile CRM, Go to *Admin Settings*. Click the *API and Analytics* section and copy the *API Key* for REST clients.



Step 2: Login to your LiveHelpDesk administrator panel, go to *My Account* -> *Integrations* and click on *Eventing API*.



Step 3: Login to your LiveHelpDesk administrator panel, go to *My Account -> Integrations* and click on *Eventing API*.

- Click on *Add Event*.
- Select *ChatOpened* Event.
- Select *JSON* for Event Type.
- Select *POST* for Event Verb.

The screenshot shows the 'Eventing API' configuration interface. At the top right, there is a green 'Add Event' button. Below it is a table with columns: Event Name, Event Verb, Event Type, Request URL, Enabled, and Testing. The main section is titled 'Eventing API Information'. It contains three dropdown menus: 'Event:' with 'Chat Opened' selected, 'Event Type:' with 'JSON' selected, and 'Event Verb:' with 'POST' selected. A blue box highlights these three dropdowns, with an arrow pointing to it from the annotation '2. Choose as Shown'. Below the dropdowns is a section for 'HTTP Basic Authentication (provide only if required by receiving endpoint):' with two input fields: the first contains 'sanny@spacetek.com' and the second is masked with asterisks. An arrow points to these fields from the annotation '3. Enter Agile CRM credentials (username and password)'. At the bottom left, there is a 'Headers:' section with a green 'Add New Header' button.

Step 4: On the same page leave the Headers fields blank. Copy the code below the image and paste it in the box as shown. Add the URL to where contacts need to be pushed. Then add an email address to receive failed notifications.

The screenshot shows the 'Headers' and 'Payload' configuration section. At the top left, there is a 'Headers:' section with a green 'Add New Header' button and two input fields: 'Key' and 'Value'. An arrow points to these fields from the annotation '1. Leave Blank'. Below this is a 'Payload:' section with a text area containing a JSON object:

```
{
  "properties": [
    {
      "type": "SYSTEM",
      "name": "first_name",
      "value": "$$$firstName$$$ "
    }
  ]
}
```

 An arrow points to this text area from the annotation '2. Paste Code Here'. Below the payload is a 'URL:' section with an input field containing 'https://spacetek.agilecrm.com/dev/api/contacts'. An arrow points to this field from the annotation '3. Enter URL. Change "spacetek" to reflect your domain.'. Below the URL is an 'Event failed notification email(s):' section with an input field containing 'sanny@spacetek.com'. An arrow points to this field from the annotation '4. Add Email Address'. At the bottom, there is a note: 'To add multiple email addresses, please separate by ;'.

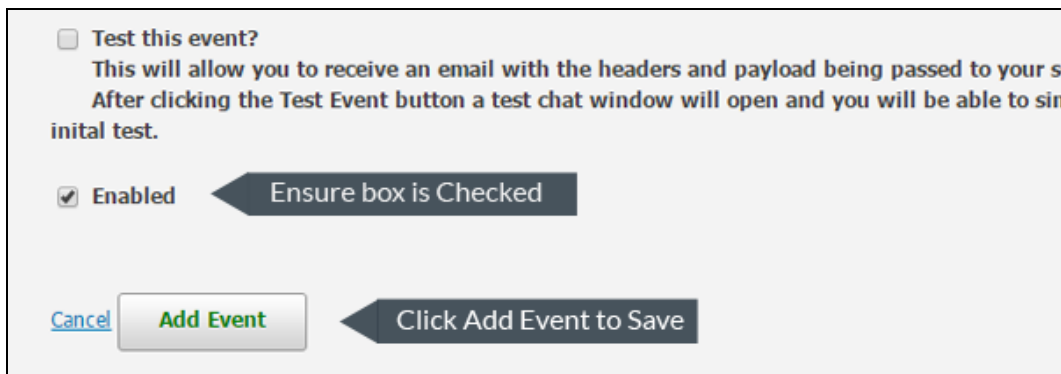
Code to be pasted in the Payload Box:

```
{
"properties": [
{
"type": "SYSTEM",
"name": "first_name",
"value": "$$$FirstName$$$ "
},
{
"type": "SYSTEM",
"name": "last_name",
"value": "$$$LastName$$$"
},
{
"type": "SYSTEM",
"name": "email",
"subtype": "",
"value": "$$$Email$$$"
}
]
}
```

The `$$$FirstName$$$` and the `$$$LastName$$$` label in the code above indicates that you're collecting the user's Name in the Pre-Chat Requested Information Settings. This is mapped to "Full Name" CRM Field.

Similarly, the `$$$Email$$$` label in the code assumes that you're collecting the user's Email in the Pre-Chat Requested Information Settings. This is mapped to "Email" in CRM.

Step 5: Click on Add Event to save the Event. (A simulation of how this integration works is possible - choose the checkbox "Test this event" to see a test contact being pushed into Agile CRM.)



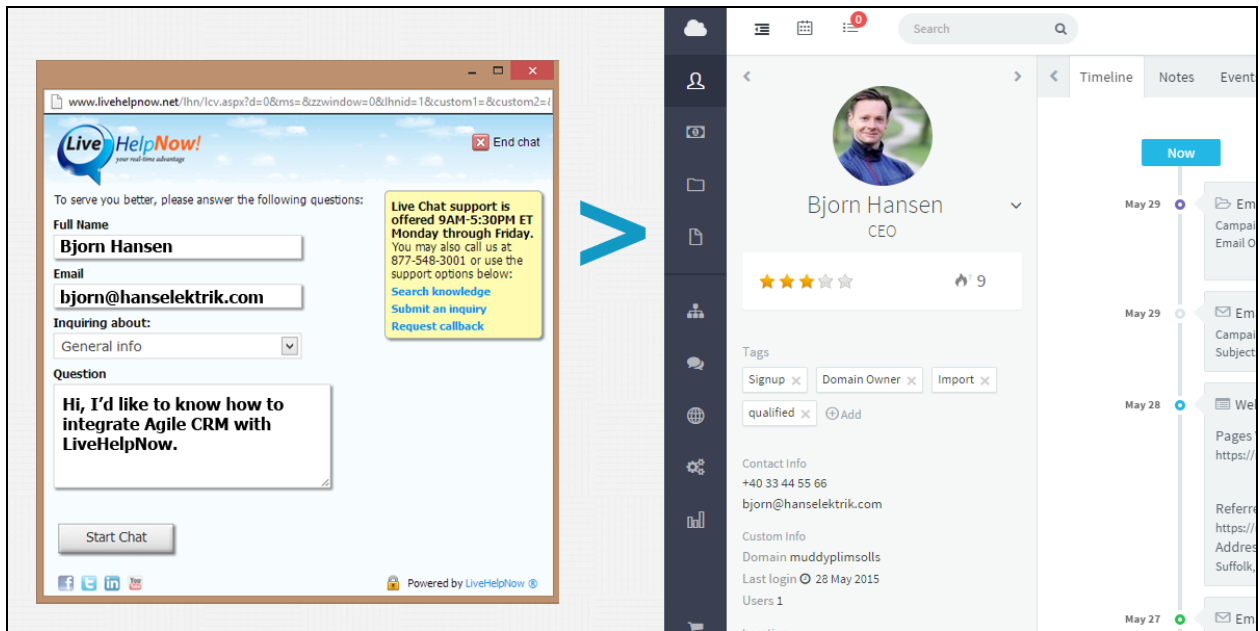
The screenshot shows a dialog box with the following elements:

- Test this event?
This will allow you to receive an email with the headers and payload being passed to your s
After clicking the Test Event button a test chat window will open and you will be able to sin
initial test.
- Enabled ← Ensure box is Checked
- [Cancel](#) ← Click Add Event to Save

And we're done. Now whenever a visitor utilizes the LiveHelpNow support system and enters his "First Name" and "Email" (in this example), the visitor gets pushed into Agile CRM as a new contact.

Our visitor was *Bjorn* with the email bjorn@hanselektrik.com. As soon as Bjorn put in details to use support, his details were pushed into Agile as a new contact.

Over time, Spacetek built a great relationship with Bjorn. Now they have his last name, mobile number and even a photo.



For other integrations and plugins:

<https://www.agilecrm.com/plugins>

Contact Us:

+1 800 980 0729

care@agilecrm.com



Thank you for choosing Agile CRM