

# livepro for PureCloud

22 March 2018

Version 1.7

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### Introduction

livepro can be integrated with PureCloud in a few different ways depending on the features you would like. This document contains the details to help you take advantage of these integrations.

## livepro Widget Integration

A widget adds livepro as an integration on the sidebar so that the user may click the apps in the sidebar and utilise livepro while working in PureCloud.

To add an integration, you will need admin permissions.

The main difference between installing livepro as a widget or as a full application is by specifying the "Application Type" as either "widget" or "standalone" in the PureCloud Configuration settings (see the steps below).

#### Installing the livepro Widget

1. Inside the admin panel click the Integrations option under the Integrations menu.

Image: PureCloud Admin   PureCloud Voice   PureCloud Voice   Number Management   Subscription   Organization Settings   People   Roles / Permissions   People   Roles / People		Performance 🔻 Reports 🗚	Admin	
Image: Number Management       Account Settings       People and Permissions         Organization Settings       Organization Settings       People and Permissions         Organization Settings       Decourents       People and Permissions         Organization Settings       Decourents       Contact Center         Image: Integrations       Documents       Control Sections         Image: Integrations       Search Audits       Consource         Image: Integrations       Search Audits       Management         Image: Integrations       Search Audits       Consource         Image: Integrations       Search Audits       Consource         Image: Integrations       Search Audits       Consource         Image: Integrations       Outh       Utilization         Image: Integrations       Outh       Image:	0	PureCloud Admi	n	
Number Management Subscription Authorized Organizations   Organization Settings People   Roles / Permissions     Integrations Documents   Vorkspaces Co-browse   Integrations Search Audits   Solis Single Sign-on Utilization   OAuth Search Audits   Variap Up Codes Email   Single Sign-on Utilization   OAuth Search Audits   Single Sign-on Utilization   Conted Responses Email   Cancel Responses Scription   Scription <td< th=""><th>Ś</th><th>PureCloud Voice</th><th>Account Settings</th><th>People and Permissions</th></td<>	Ś	PureCloud Voice	Account Settings	People and Permissions
Integrations       Documents       Contac Center         Integrations       Norkspaces       Cobrowse         Integrations       Search Audits       Cobrowse         Integrations       Bridge       Uilization         Bridge       Single Sign-on       Queues         OAuth       Vars-Purc Oauts       Mang-Purc Oauts         Integrations       Autins       Single Sign-on         Integrations       OAuth       Vars-Purc Oauts         Integrations       Vars-Purc Oauts       Single Sign-on         Integrations       OAuth       Vars-Purc Oauts         Integrations       Vars-Purc Oauts       Single Sign-on         Integrations       Vars-Purc Oauts		Number Management	Subscription Organization Settings	Authorized Organizations People
Integrations       Documents       Contac Center         ◊       Actions       Workspaces       Co-browse         Integrations       Search Audits       ACD Skills         ◊       Bridge       Utilization       Queues         ◊       OAuth       Krap-Up Codes       Email         ◊       OAuth       Email       Conted Responses         ◊       OAuth       Script Semonses       Script Semonses         ◊       OAuth       Script Semonses       Script Semonses         ◊       OAuth       Script Semonses       Script Semonses         ◊       Script Semonses       Script Semonses       Script Semonses				Roles / Permissions
Image: Second	2,	Integrations	Documents	Contact Center
Image: Search Audits       ACD Skills         Bridge       Utilization         Single Sign-on       Queues         OAuth       Wrap-Up Codes         E       Ganed Responses         Script Templates       Script Templates         Script Templates       Script Templates         Script Letters       Script Templates         Script Letters       Script Templates		Actions	Workspaces	Co-browse
Bridge Bridge Utilization   Single Sign-on Queues   OAuth Wrap-Up Codes   Email Canned Responses   Script Templates Script Templates   Social Listeners Social Listeners		Integrations	Search Audits	ACD Skills
OAuth       Wrap-Up Codes         Email       Email         Comed Responses       Script Templates         Script Templates       Social Listeners         Social Listeners       Social Listeners	64	Bridge Single Sign-on		Utilization
Email Canned Responses Scripts Script Templates Social Listeners Social Accounts	6	OAuth		Wrap-Up Codes
Canned Responses Scripts Script Templates Social Listeners Social Accounts				Email
Scripts Script Templates Social Listeners Social Accounts	<u>e</u> "			Canned Responses
Social Listeners Social Accounts				Scripts
Social Listeners Social Accounts				Script Templates
Social Accounts				Social Listeners
				Social Accounts

2. Click "Add integration"

	Ξ	Manage Web	b Integrations						
	Integrations		<u> </u>						
\$	Actions	Add Integra	ration						
	Didae		Name 🔺				Category	-	Status
ρ	Diluge					Q	All	~	All
	Single Sign-on					-			
	OAuth		livepro-sideb Allows users to a	ar Iccess livepro v	ia the app sidebar		Client Apps		Active Today at 2:46 PM

3. Click the "Install" button to begin adding livepro to PureCloud.

0	=	Available Integrations /Add Integration	
\$	Integrations Actions	Search Q	
Q	Bridge	Bitbucket Chat Notifications	Custom Client Application
	Single Sign-on	Chat Notifications	Client Apps
L9	OAuth	Sends automated notifications to PureCloud group chat rooms from Embed	Is third-party web pages in the PureCloud UI.
		Your Dilbucket account.	
		more information C*	more information 🗗

4. Add a name and description If you are installing both the widget and full screen view it is recommend naming them so they are easily distinguishable.

Manage Web Integrations: livepro-sideba	ar		Integrations /Integration Details
livepro-sidebar Custom Client Application	/ Client Apps		
Integration Details Configuration			
Information			
General		Status	
Name		Current	Last Updated
livepro-sidebar		INACTIVE	Today at 2:41 PM
Notes			
Allows users to access livepro via the app side	abar		
			.tj

5. Complete the integration configuration Switch to the "Configuration" tab.

Application URL: The application URL is the URL to your livepro website with an additional "/inline?source=purecloud" added to the end. Example: https://client.livepro.com.au becomes https://client.livepro.com.au/inline?source=purecloud

Application Type: widget

Application Category: Leave empty

*Iframe Sandbox Options*: allow-scripts, allow-same-origin, allow-forms, allow-modals, allow-popups

Group Filtering: The group filtering specifies the groups of users that will be able to see the

### application.

grations: livepro-sidebar		Integrations /Integration Details
2ar Custom Client Application / Client Apps		
Configuration		
Properties		
• Add Property		
Property Name	Value	
Application URL * The URL of the Application PureCloud should load.	https://ldev.livepro.com.au/inline	
Application Type * Dictates the way the application will appear and function inside of PureCloud	widget	> Default
Application Category Tailors application behavior to a specialized purpose.		2
Iframe Sandbox Options Comma-separated list of limited HTML5 iframe sandbox options to control application permissions	allow-scripts,allow-same-origin,allow-forms,allow-modals	
Group Filtering List of Groups whose members can see this application. Hidden if no group is selected.	liveproaccess Select Groups	

### 6. Activate the plugin

Manage Web Integrations: livepro-sidebar		Integrations /Integration Details
Inverro-sidebar, Custom Client Application / Client Apps	Change Status	
	Are you sure that you want to activate livepro-sidebar?	
Integration Details Configuration	Ves No	
Information		
General	Status	
Name	Current	Last Updated
livepro-sidebar		Today at 2:41 PM

7. Test the integration by clicking on the apps icon on the bottom left of PureCloud



8. Refresh the PureCloud application using the browser refresh button and the integration will be active.



9. Installation is complete.

# livepro Full Application Integration

A full application integration adds livepro to the application menu on the top bar inside PureCloud. This enables livepro to be viewed in full screen.

To add an integration you will need admin permissions.

The main difference between installing livepro as a widget or as a full application is by specifying the "Application Type" as either "widget" or "standalone" in the PureCloud Configuration settings (see the steps below).

### Installing the livepro Full Application

1. Inside the admin panel click the Integrations option under the Integrations menu.

			Admin		
0	Pu	ireCloud Ad	min		
Ś	Pure	eCloud Voice	Acco	unt Settings	People and Permissions
	Num	ber Management	Subsc	ription nization Settings	Authorized Organizations People
			5		Roles / Permissions
	Actic	ons	Work	spaces	Co-browse
$\Box$	Integ	grations ge	Search	h Audits	ACD Skills Utilization
Ø	Singl	e Sign-on th			Queues Wrap-Up Codes
õ					Email Canned Responses
					Scripts Script Templates
					Social Listeners
					Social Accounts

#### 2. Click "Add integration"

0	Ξ	Manage W	Veb Integrations						
	Integrations								
\$	Actions	Add Inte	egration						
	Dridge		Name 🔺				Category	Status	
$\mathcal{Q}$	Diruĝe					Q	All	All	
	Single Sign-on					-			
ß	OAuth		livepro-side Allows users to	bar access livepro v	Via the app sidebar		Client Apps	C Active Today	e at 2:46 PM

3. Click the "Install" button to begin adding livepro to PureCloud.

0	=	Available Integrations /Add Integration	
\$	Actions	Search Q	
Q	Bridge	Bitbucket Chat Notifications	Client Application
Č	Single Sign-on	Chat Notifications	s
	OAuth	Sends automated notifications to PureCloud group chat rooms from Embeds third-party web	pages in the PureCloud UI.
S		your bilducket account.	
		more information 🗗	more information 🗗

4. Add a name and description If you are installing both the widget and full screen view it is recommend naming them so they are easily distinguishable.

Manage Web Integrations: livepro-sideba	ar		Integrations /Integration Details
livepro-sidebar Custom Client Application	/ Client Apps		
Integration Details Configuration			
Information			
General		Status	
Name		Current	Last Updated
livepro-sidebar		INACTIVE	Today at 2:41 PM
Notes			
Allows users to access livepro via the app side	abar		
			.tj

5. Complete the integration configuration Switch to the "Configuration" tab.

Application URL: The application URL is the URL to your livepro website with an additional "/inline?source=purecloud" added to the end. Example: https://client.livepro.com.au becomes https://client.livepro.com.au/inline?source=purecloud

Application Type: standalone

Application Category: Leave empty

*Iframe Sandbox Options*: allow-scripts, allow-same-origin, allow-forms, allow-modals, allow-popups

Group Filtering: The group filtering specifies the groups of users that will be able to see the

### application.

grations: livepro-sidebar		Integrations /Integration Details
Dar Custom Client Application / Client Apps		
Configuration		
Properties		
• Add Property		
Property Name	Value	
Application URL * The URL of the Application PureCloud should load.	https://ldev.livepro.com.au/inline	
Application Type * Dictates the way the application will appear and function inside of PureCloud	widget	∽ ⊃Default
Application Category Tailors application behavior to a specialized purpose.		-
Iframe Sandbox Options Comma-separated list of limited HTML5 iframe sandbox options to control application permissions	allow-scripts,allow-same-origin,allow-forms,allow-modals	
Group Filtering List of Groups whose members can see this application. Hidden if no group is selected.	liveproaccess Select Groups	

### 6. Activate the plugin

Manage Web Integrations: livepro-sidebar		Integrations / Integration Details
	Change Status	
	Are you sure that you want to activate livepro-sidebar?	
Integration Details Configuration	VesNo	
Information	-	
General	Status	
Name	Current	Last Updated
livepro-sidebar	ACTIVE	Today at 2:41 PM

### 7. Test the integration by clicking on the apps icon on the bottom left of PureCloud

00°	Activity	Directory 🔻	Documents	Performance 🔻	Reports	Apps 🝷		
0	=		Manag	e Web Integrations	livepro-main			
~			0.	liverse main Queters of				
X	Actions			livepro-main Custom C	lient Applicatio	n / Client App	S	

You will now be able to access livepro from within PureCloud.

ő				Q 👃 ОП Queue
0	<b>P</b> (	Search Q		📢 Feedback 🔺 Favourites 🖾 Open livepro
☆	Home			
0		Correspondence Information	Customer Contact Centre	Business Units
~		People	livepro	Resources
C4				
S				
⋳				
Ø				
<u>o</u> "				
08				
	8.	Installation is complete.		

# Populating Knowledge from livepro

Whether on call, in a web chat or responding to an email livepro is able to populate relevant knowledge to your agents as they enter an interaction.

To populate the knowledge into an interaction you will have to create a script. When you create the script you can either leave the search blank (see the steps below) so the agent can choose a search term or you can pre-populate the search by passing through a parameter. We recommend passing through a parameter as it means the agent is ready to go as soon as the interaction initiates.

1. Create a script inside of PureCloud

To create a script the user will need the 'Script Designer' role inside of PureCloud. Enter the admin area of PureCloud and click 'Scripts' underneath the 'Contact Center' area then press 'Create' to create a new script and select 'Blank Script'.

0	≡ Scripts		
\$	Scripts	Delete     Ocreate     A Export     A import	
Ω	Templates	Script Name	Last Modified
C4		C LPTest	Tuesday, February 6, 2018 2:16 PM
ç		RefundChat	Tuesday, February 6, 2018 2:15 PM
ß		Page ( 1 ) of 1 50 v records per page	
69			
0"			
 0.			

Add "Web Page" component to the script
 On the sidebar there is a 'Web Page' component that you can add. Drag this onto the script.
 Livepro will appear in this component.



 Configure the "Web Page Source" for the component In the web page pane you will need to insert livepro as the source. The URL you will use will be: https://CLIENT.livepro.com.au/inline?source=purecloud#/search/ Where CLIENT is your client name or normal url.

The above URL will give your user a blank search page, to add a search term you may add a word after /search/. Example searching for dogs: https://CLIENT.livepro.com.au/inline?source=purecloud#/search/dogs

In the below screenshot we are using a PureCloud variable to populate our search box. If you have any options passed through your IVR or want a variable populated in the search you may do it like below.



4. Process complete.

# Permission Integration

This form of integration allows the users you have set up in PureCloud to automatically be created and assigned licenses in livepro when they first access livepro. This also allows you to assign permissions in PureCloud which correspond to roles in livepro. PureCloud and livepro use the industry standard OAuth2 for secure delegated access.

You need to set up a trust relationship between PureCloud and livepro using credentials generated in PureCloud.

### Generate PureCloud credentials to allow livepro integration with PureCloud

You need to set up PureCloud so that it allows livepro to communicate with your PureCloud account. The following steps explain how to generate credentials in PureCloud that can be passed on to livepro so that livepro can interact with PureCloud.

- → C ☆ a Secure https://apps.mypurecloud.com/directory/#/admin/welcomeV2  $\leftarrow$ • ☆ : Admin Off Que PureCloud Admin Account Settings **People and Permissions** Directory Integrations Subscription Authorized Organizations Actions Groups Organization Settings People Locations Integrations **Profile Fields** Roles / Permissions Bridge Single Sign-or OAuth Documents PureCloud Voice **Contact Center** Architect Workspaces Number Management Co-browse Architect Search Audits **ACD Skills** Utilization
- 1. Enter PureCloud Admin and click "OAuth"

#### 2. Click "Add Client"

00°		Directory 👻	Documents					٩	Off Queue
	=		Manage	OAuth Applications	3				
St.			• Add	Client					
Q	Bridge		App Na	ime		Client ID			Actions
			Fresco_	Created_Client_livepr	oDemo	8deae81d-l	bbda-4fb6-af25-60605598d248		
S	Single Sign	-011	livepro			4e8057f0-b	023a-4f1a-bfaa-6870399794a6		
Ð	OAuth								
Ø									
ĝ									
08									

3. Fill out client details

App Name – a name so that you know what application will be using the credentials (recommend "livepro")

Description – Any text. Token Duration – leave at default value Grant Types – select "Code Authorization" Authorized redirect URIs – this will be provided by livepro. If you do not have a livepro URI please contact livepro at "support@livepro.com.au" with your company name and details. Generally it will be in the form of "https://CLIENTNAME.livepro.com.au/oauth2/callback"

PDIO Manage OAuth Applications / Edit Application	
Client Details	
App Name	
livepro	
Description	
This is the livepro app authorisation codes.	
Token Duration (seconds): the number of seconds, between 5mins and 48hrs, until tokens	created with this client expire.
86400	÷
Grant Types	
Client Credentials	
Code Authorization	
O Token Implicit Grant (Browser)	
SAML2 Bearer	
Authorized redirect URIs (one per line)	
https://ldev.livepro.com.au/oauth2/callback	

- 4. Click "Save"
- 5. Send livepro your ID and secret keys
  - Once your page has been saved it will reload and you will see some fields appear at the bottom of the page. The fields Client ID and Client Secret will need to be emailed to "support@livepro.com" with the name of your company and we will add these to your application, so you can get started.
- 6. Process complete.

# Syncing roles in PureCloud with livepro

Syncing the roles of your users allows you to easily choose what users in livepro can see without leaving PureCloud.

Depending on your current PureCloud setup livepro can sync with either the ACD Skills or groups. This guide will show you how to sync both options.

#### Create Roles in livepro

Create roles inside livepro that you would like to sync with PureCloud. Roles require permissions and scopes to be of any use. Please consult the livepro help for details on how to set up roles.

Add role	×
DESCRIPTION:	CouncilUser
LOGO PERMALINK:	
HOME PERMALINK:	
ACCESS TO ADMINISTRATION:	
ACCESS TO REPORTS:	
	Cancel Bave

If you are using ACD Skills to manage users continue to <u>Add New ACD Skill in PureCloud</u>, otherwise if you are using Groups to manage users go to <u>Add New Group in PureCloud</u>.

#### Add New ACD Skill in PureCloud

To add your new ACD Skill in PureCloud you will need admin permission.

To add the new skill you should click the 'Admin' link then under the 'Contact Centre' area click 'ACD Skills'.

Ensure the name of the skill is exactly the same as the description you provided for the role inside of livepro. To make sure there is no issues we recommend copying the role from livepro and pasting it into PureCloud.

00°			
0		Manage ACD Skills	Add Skill ×
\$	Utilization	Search	
Q	Queues		Courtenuser
B	Wrap-Up Codes	Q Add Skill	Save Cancel
S	Canned Responses	Skill	
	Co-browse	DL Lending Solutions	
6		Defensive Specialist	
0		Finisher	
		Midfield Maestro	
08		User - Super	

#### Add Skills to Users

Click the 'Admin' link click followed by 'People' under 'People and Permissions'. Select the user you want to add the role to and open up the 'ACD Skills' tab.

Once the skill has been added to the user they will need to login and logout to sync their new roles.

00°		
0	≡ People	Luke Szanto Manage People /Edit Person
\$	Roles / Permissions	Roles & Licenses View Permissions Phone ACD Skills Person Details
Q	Authorized Organizations	Skills
		Select Skill Clinical Finisher
S		CouncilUser DL Lending Solutions CouncilUser Defensive Specialist
Ø		Finisher Midfield Maestro
$\diamond$		User - Superannuation - Employees
8"		
Q.		

#### Add New Group in PureCloud

To add your new group to PureCloud you will need admin permission.

To add the new group you should click the 'Admin' link then under 'Directory' area click 'Groups'.

Ensure the name of the group is the exactly the same as the description you provided for the role inside of livepro but with "livepro-" as a prefix. To make sure there are no issues we recommend copying the role from livepro and pasting it into PureCloud with a "livepro-" prefix.

00°	Activity Directory - Doo	cuments Performance 🕶 Apps 💌 Admin	
	≡ Groups	Manage Groups	Add livepro-CouncilUser ×
\$	Locations	Search	Name
Q	Profile Fields		livepro-CouncilUser
C4		Add Group	Type Official
S		Name	Visibility
		group-3	Public V Save Cancel
Ø			
ĝ		ivepro-Administrators - System	
08		livepro-Evangelist	

### Add Group to Users

To add users to your new group to PureCloud you will need admin permission.

To add the users you should click the 'Admin' link then under 'Directory' area click 'Groups'. Open up the group you have created then click 'Edit' to add users to the group then save once you're done.

Once the group has been added to the user they will need to login and logout to sync their new roles.

Circop Detais Exchange Sync Circop Detais Exchange Sync Protite Fields Ect Group	
Profile Flatds Edit + Group	
Membership (1)	
& Industrial Exdu	sions
Search Members	٩
Official 	A Owner ··· X
Gal Keeping	
S5 Group Visibility Public Grant Keeping Grant Keeping	
agent	0
Save Cancel	

# Version Information

Changed By	Date	Version Number	Notes
Luke Szanto	5/02/2018	1.0	Initial OAuth data
Lester Bloomberg	19/02/2018	1.1	Layout changes and introductory texts
Luke Szanto	19/02/2018	1.2	livepro widget and application integration added
Luke Szanto	20/02/2018	1.3	Syncing roles with PureCloud added.
Luke Szanto	26/02/2018	1.4	Populating data in PureCloud added.
Lester Bloomberg	13/03/2018	1.5	Layout changes and proofing.
Luke Szanto	14/03/2018	1.6	Adding correct iframe sandbox options
Shannon OʻConnor	22/03/2018	1.7	Changed 'livepro with PureCloud' to 'livepro for PureCloud'