



livepro for Genesys Cloud

Telephony Integration

Version Information

Changed By	Date	Version	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 O'Connor	22/03/2018	1.7	Changed 'livepro with PureCloud' to 'livepro for PureCloud'
Luke Szanto	22/03/2018	1.8	Added step 6 to permission integration guide
Luke Szanto	22/03/2018	1.9	Add screenshot of codes generated
Corinne Chan	5/04/2018	2.0	<p>Page 5, step 3 – added a line to instructions that says “install button on the 'Custom Client Application' box to begin adding livepro”.</p> <p>Page 12, Step 1 – specified that a name has to be given to the new script before selecting 'blank script'.</p> <p>Page 18, under ‘Add Skills to User’ changed “select user” to “click on the name of the user you want to add...” as there is an option to select users via a check box and that doesn’t take you to the skills page.</p>
James Walsh	15/05/2020	2.1	Updated formatting & details to Genesys Cloud

Confidentiality Statement

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Introduction

livepro can be integrated with Genesys Cloud 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

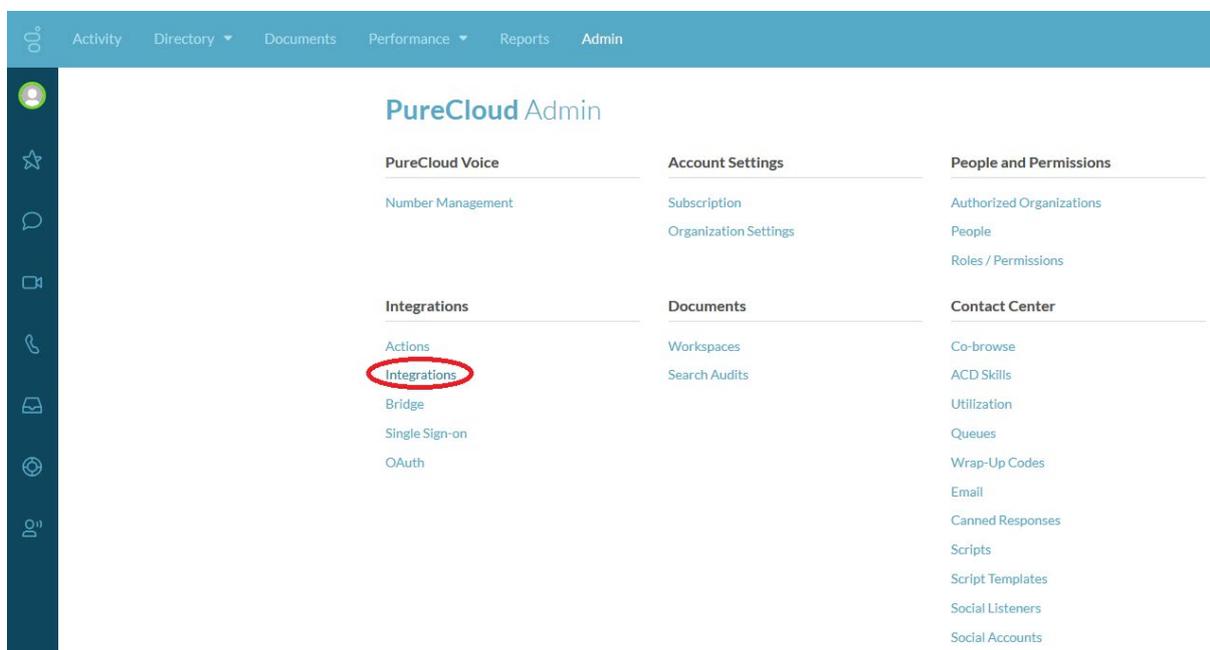
A widget adds livepro as an integration on the sidebar so that the user may click the apps in the sidebar and utilise livepro while working in Genesys Cloud.

To add an integration, you will need admin permissions.

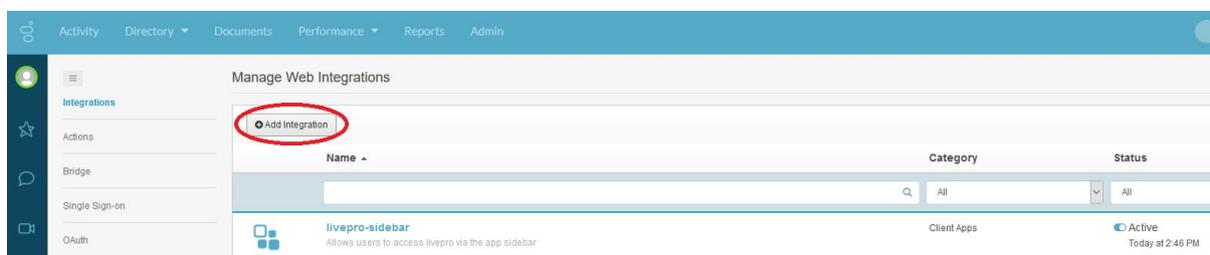
The main difference between installing livepro as a widget or as a full application is by specifying the “Application Type” as either “widget” or “standalone” in the Genesys Cloud Configuration settings (see the steps below).

Installing the livepro Widget

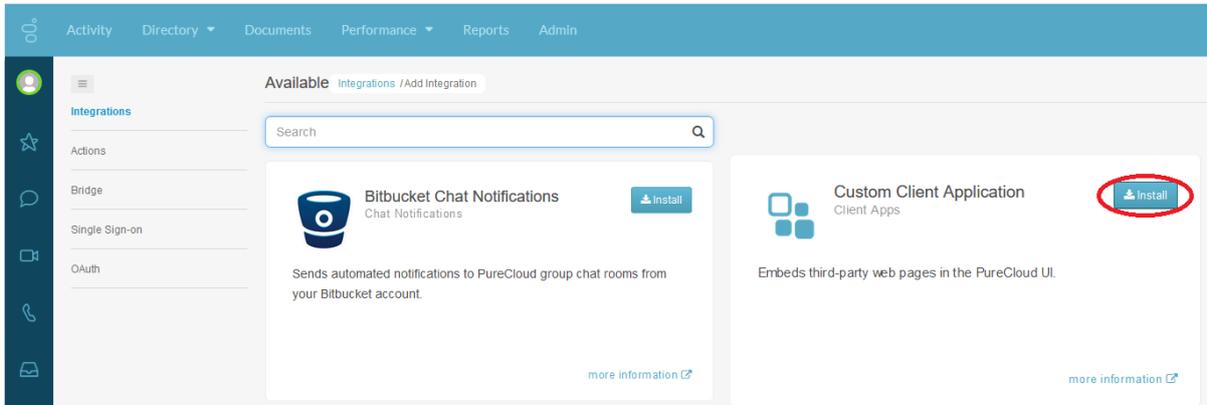
1. Inside the admin panel click the Integrations option under the Integrations menu.



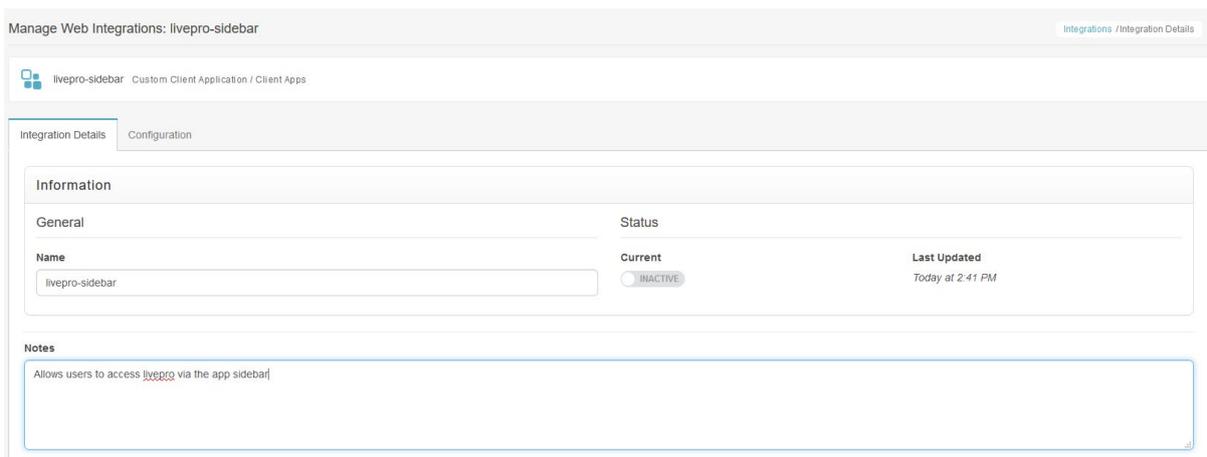
2. Click “Add integration”



3. Click the “Install” button on the 'Custom Client Application' box to begin adding livepro to Genesys Cloud.



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.



5. Complete the integration configuration
Switch to the “Configuration” tab and enter the following settings.
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.

Integrations: livepro-sidebar Integrations / Integration Details

Custom Client Application / Client Apps

Configuration

Properties

[Add Property](#)

Property Name	Value
Application URL * The URL of the Application PureCloud should load.	<input type="text" value="https://i.dev.livepro.com.au/inline"/>
Application Type * Dictates the way the application will appear and function inside of PureCloud	<input type="text" value="widget"/> Default
Application Category Tailors application behavior to a specialized purpose.	<input type="text"/>
Iframe Sandbox Options Comma-separated list of limited HTML5 iframe sandbox options to control application permissions	<input type="text" value="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

livepro-sidebar Custom Client Application / Client Apps

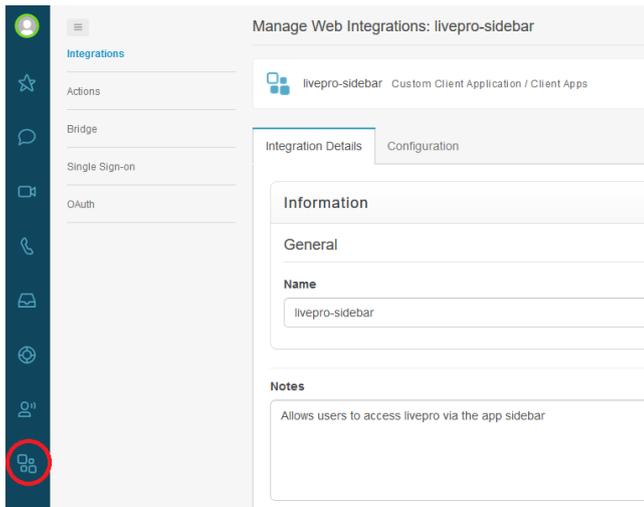
Integration Details Configuration

Change Status

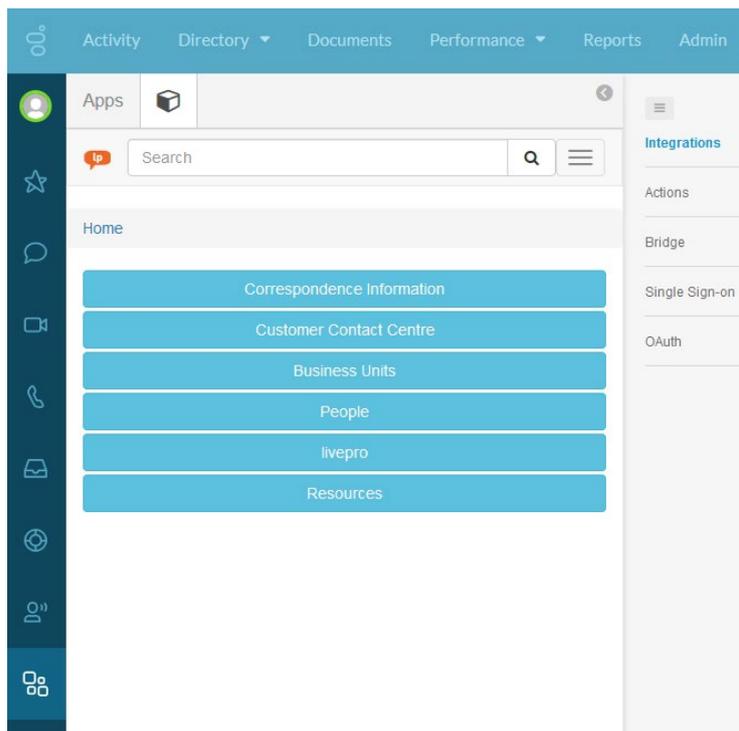
Are you sure that you want to activate livepro-sidebar?

Information	
General	Status
Name <input type="text" value="livepro-sidebar"/>	Current <input checked="" type="button" value="ACTIVE"/>
	Last Updated Today at 2:41 PM

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



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



9. Installation is complete.

livepro Full Application Integration

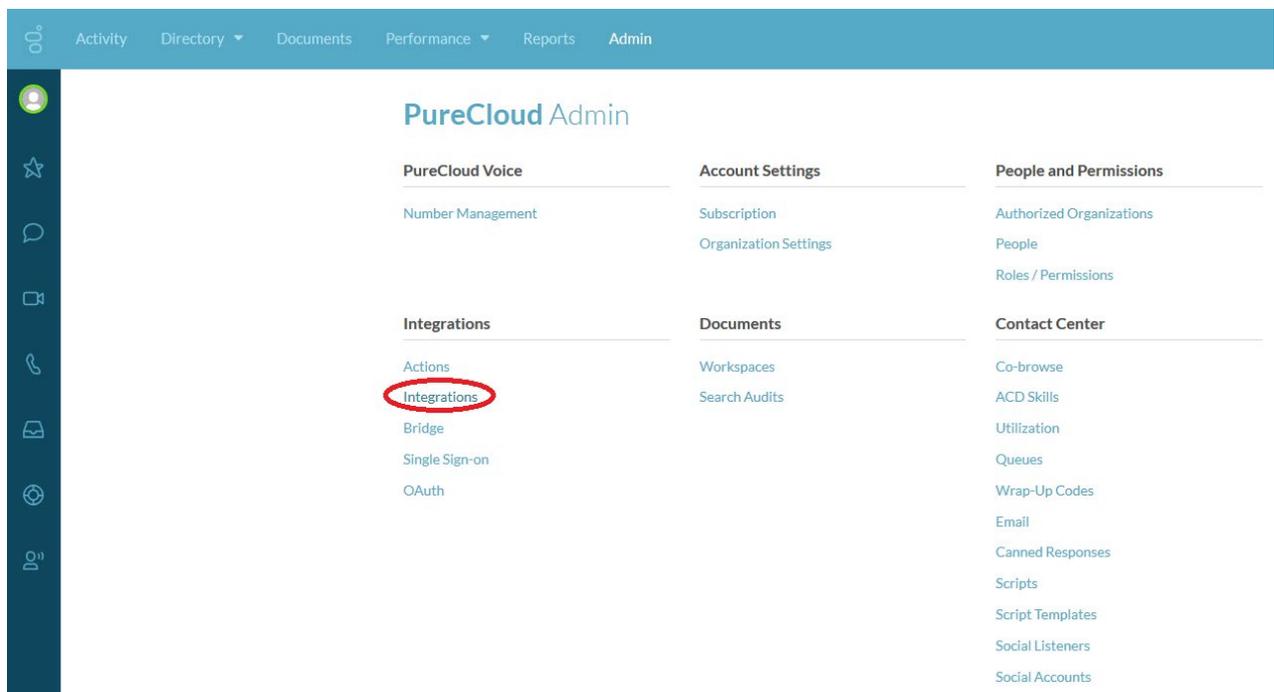
A full application integration adds livepro to the application menu on the top bar inside Genesys Cloud. This enables livepro to be viewed in full screen.

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 Genesys Cloud Configuration settings (see the steps below).

Installing the livepro Full Application

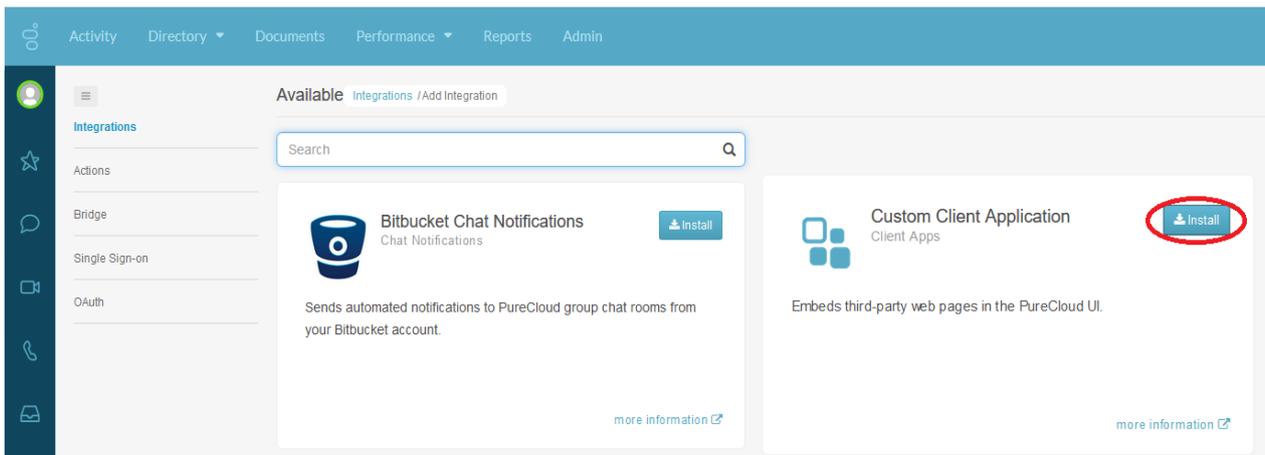
1. Inside the admin panel click the Integrations option under the Integrations menu.



2. Click “Add integration”

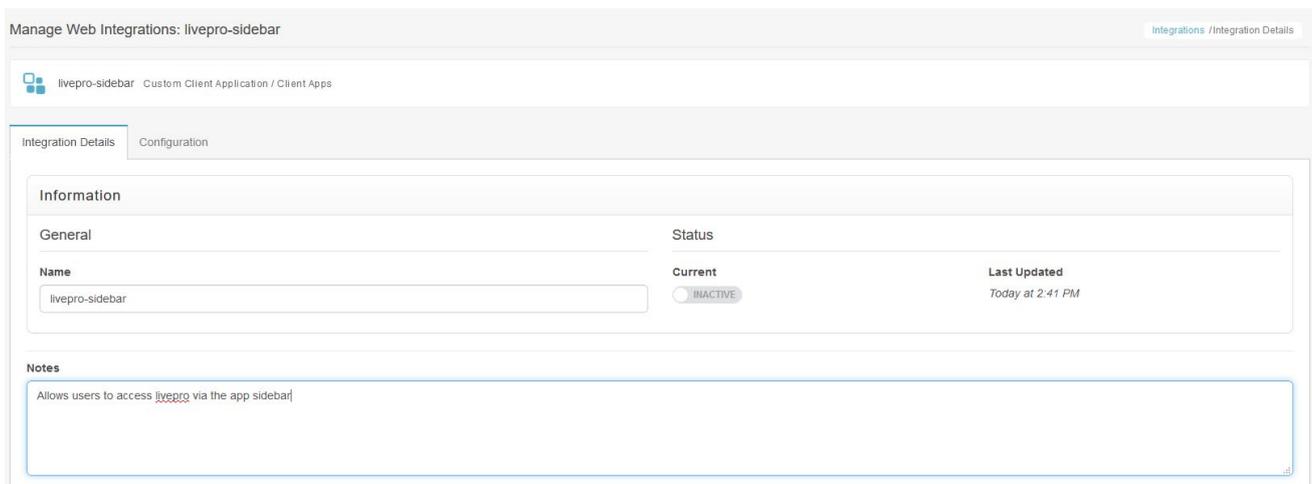


3. Click the “Install” button to begin adding livepro to Genesys Cloud.



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.



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.

Integrations: livepro-sidebar

Custom Client Application / Client Apps

Configuration

Properties

Property Name	Value
Application URL * The URL of the Application PureCloud should load.	https://idev.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

livepro-sidebar Custom Client Application / Client Apps

Integration Details Configuration

Change Status

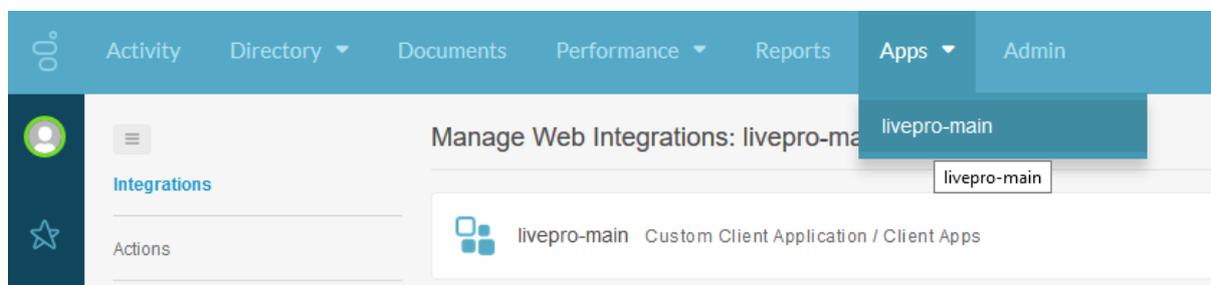
Are you sure that you want to activate livepro-sidebar?

Yes No

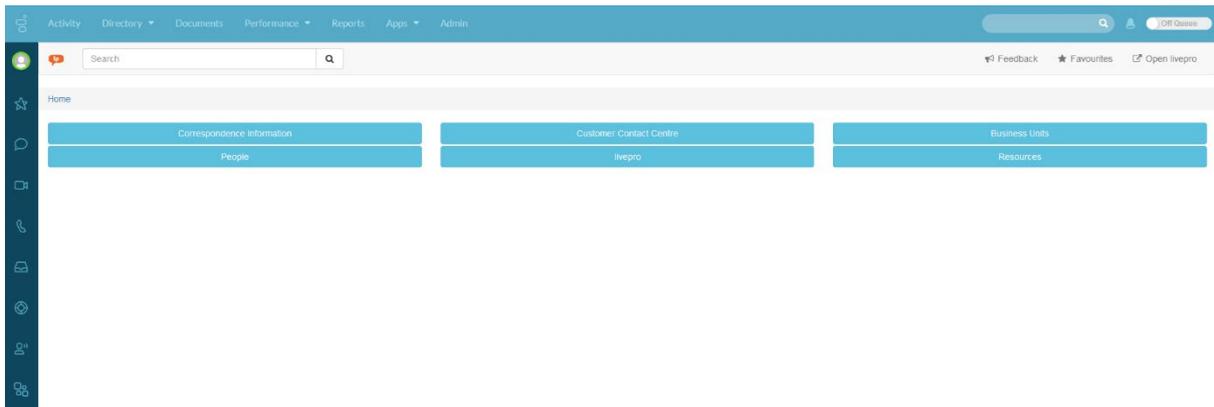
Information

General	Status	Last Updated
Name livepro-sidebar	Current ACTIVE	Today at 2:41 PM

7. Test the integration by clicking on the apps icon on the top nav bar in Genesys Cloud



You will now be able to access livepro from within Genesys Cloud.



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.

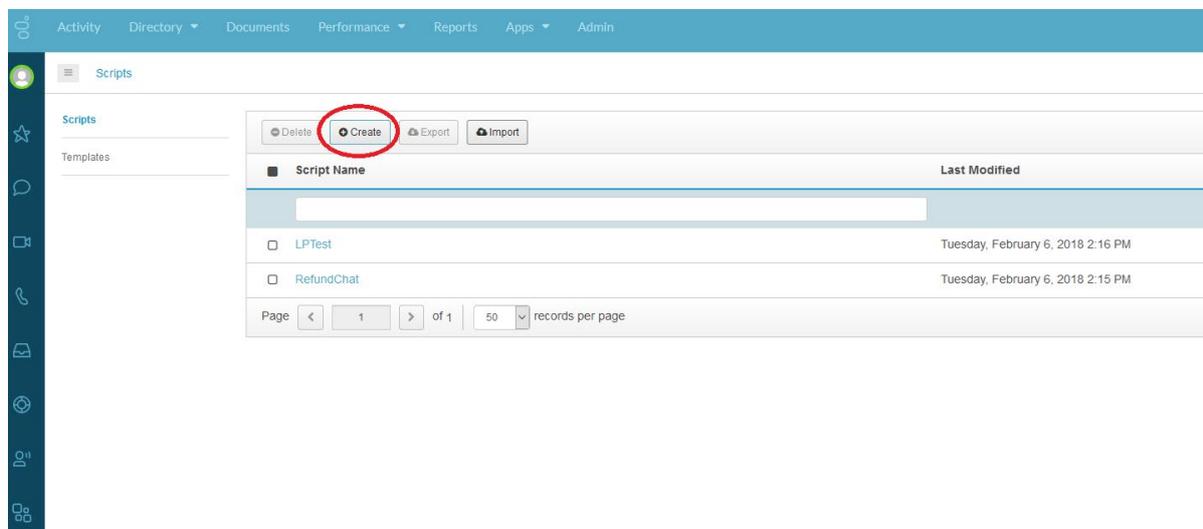
To populate the knowledge into an interaction you will have to create a script. When you create the script you can either leave the search blank (see the steps below) so the agent can choose a search term or you can pre-populate the search by passing through a parameter. We recommend passing through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

Setup the integration

1. Create a script inside of Genesys Cloud

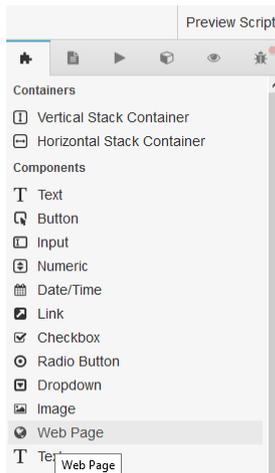
To create a script the user will need the 'Script Designer' role inside of Genesys Cloud.

Enter the admin area of Genesys Cloud and click 'Scripts' underneath the 'Contact Center' area then press 'Create' to create a new script. Give it a name and then select 'Blank Script'.



2. 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.



3. 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/>

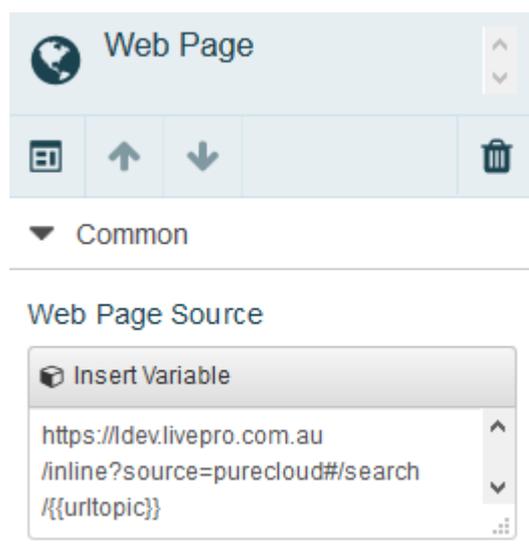
Where CLIENT is your client name or normal url.

The above URL will give your user a blank search page, to add a search term you may add a word after /search/.

For example, if you are searching for 'dogs', you would use the following URL:

<https://CLIENT.livepro.com.au/inline?source=purecloud#/search/dogs>

In the screenshot we are using a Genesys Cloud 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 in the same way.



4. Process complete.

Permission Integration

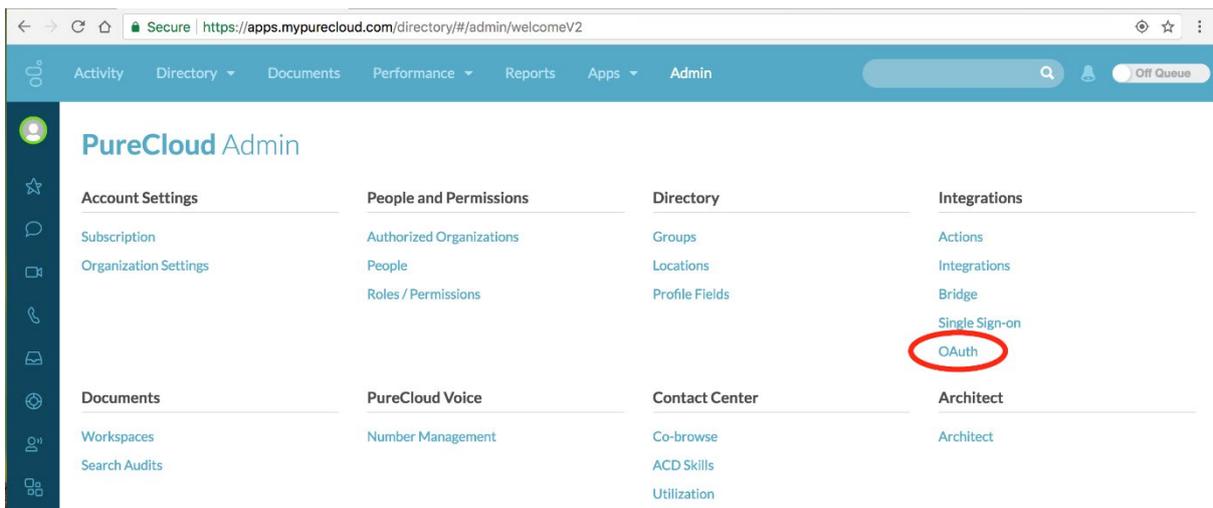
This form of integration allows the users you have set up in Genesys Cloud to automatically be created and assigned licenses in livepro when they first access livepro. This also allows you to assign permissions in Genesys Cloud which correspond to roles in livepro. Genesys Cloud and livepro use the industry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

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

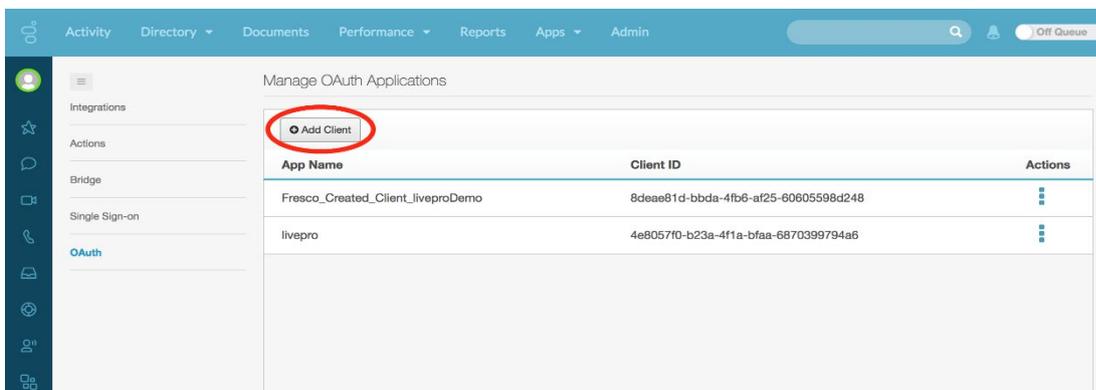
Generate credentials to allow livepro integration with Genesys Cloud

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

1. Enter Genesys Cloud Admin and click “OAuth”



2. Click “Add Client”



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”

livepro 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

Token Implicit Grant (Browser)

SAML2 Bearer

Authorized redirect URIs (one per line)

https://ldev.livepro.com.au/oauth2/callback

4. Click “Save”

- The screen should look like below:

The screenshot shows the configuration page for a client named 'livepro2'. The page includes the following sections:

- Client Details:** A header bar with 'livepro2' on the left and 'Manage OAuth Applications | Edit Application' on the right.
- App Name:** A text input field containing 'livepro2'.
- Description:** A text input field containing 'Keys for livepro2'.
- Token Duration (seconds):** A dropdown menu set to '60400'. A note below reads: 'Token Duration (seconds): the number of seconds, between 5mins and 48hrs, until tokens created with this client expire.'
- Grant Types:** Radio buttons for 'Client Credentials', 'Code Authorization' (selected), 'Token Implicit Grant (Browser)', and 'SAML2 Bearer'.
- Authorized redirect URIs (one per line):** A text area containing 'https://live.livepro.com.au/oauth/callback'.
- Client ID:** A text input field with a 'Copy' button. The value is 'fb0750db-c768-4ba2-ab88-4079111aff53d'.
- Client Secret:** A text input field with a 'New Secret' and 'Copy' button. The value is 'fH9pmM9as2uz0vPc3H4Uz9TwDLR4N2cX10MPfQ'.
- Created By:** A text input field with 'Luke Szanto' and a 'Date' field with '2/20/2018'.
- Modified By:** A text input field with 'Luke Szanto' and a 'Date' field with '2/20/2018'.

- 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.
- After receiving your client codes we will add them to your livepro instance and let you know when it has been setup and is ready to use.
- Process complete.

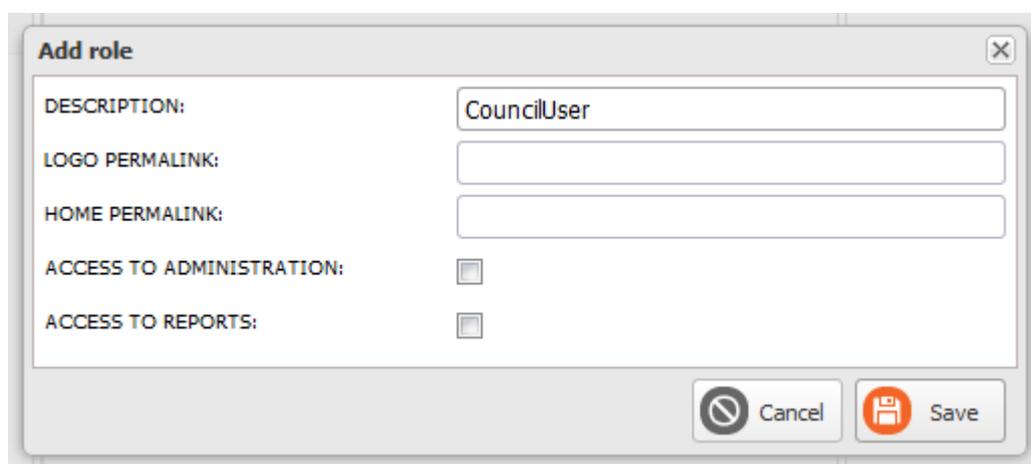
Syncing roles in Genesys Cloud with livepro

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

Depending on your current Genesys Cloud 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 Genesys Cloud. Roles require permissions and scopes to be of any use. Please consult livepro help for details on how to set up roles.



The screenshot shows a dialog box titled "Add role" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- DESCRIPTION:** A text input field containing the text "CouncilUser".
- LOGO PERMALINK:** An empty text input field.
- HOME PERMALINK:** An empty text input field.
- ACCESS TO ADMINISTRATION:** A checkbox that is currently unchecked.
- ACCESS TO REPORTS:** A checkbox that is currently unchecked.

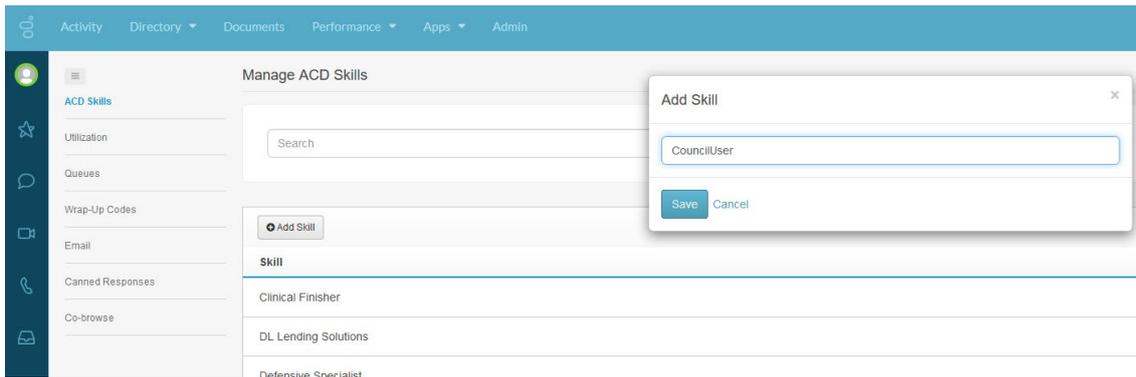
At the bottom right of the dialog, there are two buttons: "Cancel" (with a red 'X' icon) and "Save" (with a floppy disk icon).

If you are using ACD Skills to manage users continue to Add New ACD Skill in Genesys Cloud, otherwise if you are using Groups to manage users go to Add New Group in Genesys Cloud.

Add New ACD Skill in Genesys Cloud

To add your new ACD Skill in Genesys Cloud 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'.

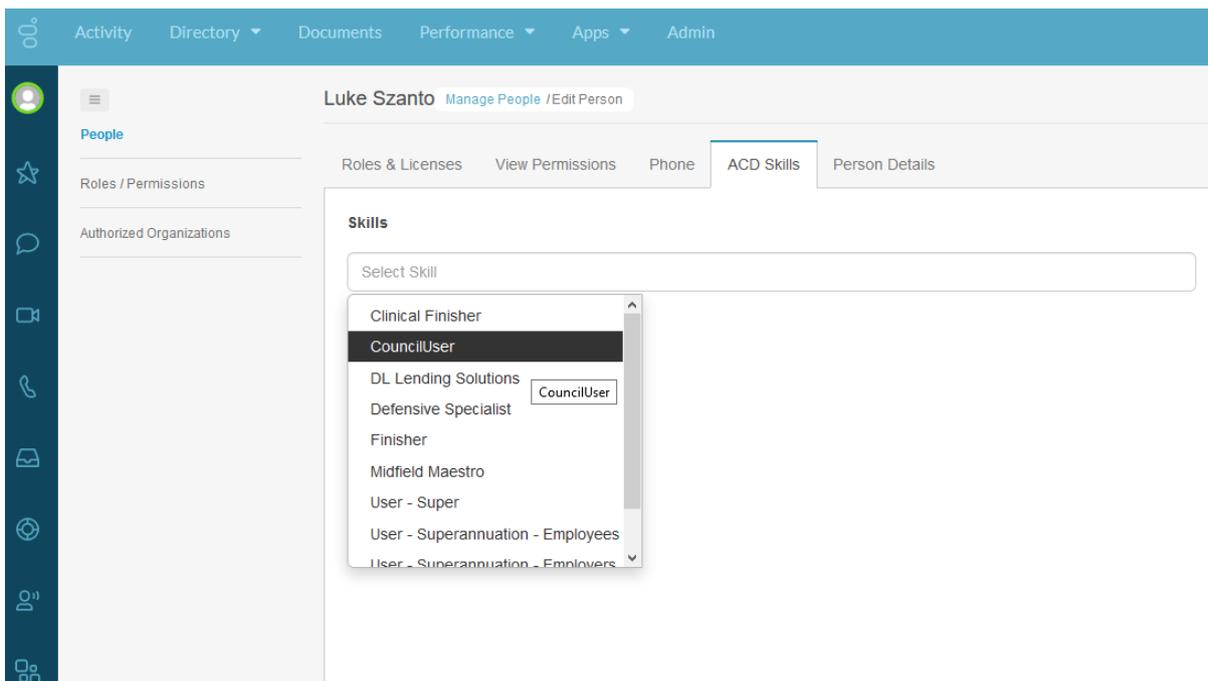
Ensure the name of the skill is exactly the same as the description you provided for the role inside of livepro. To make sure there is no issues we recommend copying the role from livepro and pasting it into Genesys Cloud.



Add Skills to Users

Click the 'Admin' link, click followed by 'People' under 'People and Permissions'. Click on the name of 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.

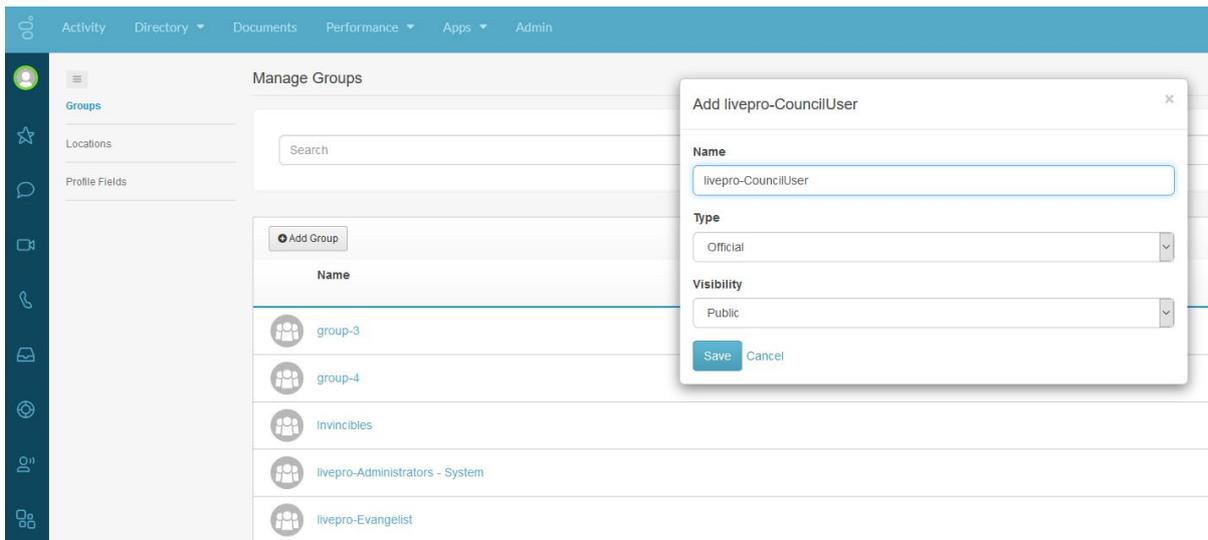


Add New Group in Genesys Cloud

To add your new group to Genesys Cloud 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 Genesys Cloud with a "livepro-" prefix.



Add Group to Users

To add users to your new group to Genesys Cloud 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.

