

LIVECHAT INTEGRATION - SET UP

A. SET-UP

In order for the integration to work, please go over these requirements and ensure you meet them:

- Ensure you have access to the Gold-Link API.
- Your Gold-Vision must be available externally (i.e. you don't need to log onto the local network / VPN to access Gold-Vision)
- Ensure you have set up a Pre Chat Survey in LiveChat to collect the email address of chats. This can be found in LiveChat > Settings > Pre-Chat Survey

If you are unsure about the above, please contact your Gold-Vision Account Manager.

- Please contact the Gold-Vision Team. They will add your customer licence key to the database in order to activate the integration.
- In the admin console, set up the integration:

Integrations > LiveChat > Settings

LiveChat Settings

Default lead list for new leads
This is the default lead list which will be displayed at the top of the list of leads in LiveChat when selecting a list to create a lead in.

Default Lead List

Update new Gold-Link credentials
To update your Gold-Link details, enter them in the boxes below. This data is not stored in Gold-Vision and will not be shown when the page is reloaded.

Gold-Vision API URL

Gold-Vision Address

Gold-Vision API Username

Gold-Vision API Password

Update LiveChat API credentials
To update your LiveChat API username and password, enter them in the boxes below. This data is not stored in Gold-Vision and will not be shown when the page is reloaded.

LiveChat API Username

LiveChat API Password

LiveChat Webhook URLs
Please copy and paste the following webhook urls into the LiveChat settings > Integration > Webhooks menu in order to set up a new integration.

Chat Started Webhook

Chat Ended Webhook

Save

- Default Lead List - set this if you wish to create leads from unknown LiveChat visitors and you would like them to go to specific lead list.
- Gold-Link credentials – enter your URL, address, username and password for Gold-Link.
- LiveChat credentials – find these in your LiveChat Agent Profile > Edit > For Developers.
- LiveChat webhooks – copy and paste these in LiveChat > Settings > Integrations > Webhooks.

B. CONFIGURATION

- Set group defaults for new items. Agent groups can be set in LiveChat.

Integrations > LiveChat > LiveChat Group Defaults

LiveChat Group Defaults

Here you can define the default action for the "New Item" button in LiveChat per group.

Allowed New Item Types

New Account Activity

New Contact Activity

New Opportunity

New Project

Agent Group Default New Item Action

All Operators

Sales

Support

[Save](#)

- Define the Display Mappings for Accounts/Contacts and Leads

Integrations > LiveChat > Display Mappings

LiveChat Display Mappings

This module defines the fields to be pulled from Gold-Vision Accounts and Contacts and displayed in LiveChat

You can drag and drop fields to set the order in which they are displayed in LiveChat

Pre Text	Gold-Vision Field	Post Text	Gold-Vision Object	
<input type="text"/>	Account Name	<input type="text"/>	Account	Delete
<input type="text"/>	First Name	<input type="text"/>	Contact	Delete
Job Title:	Job Title	<input type="text"/>	Contact	Delete
<input type="text"/>	Summary	is a contact in Gold-Vision	Contact	Delete

Add a field from the Account module:
 [Add](#)

Add a field from the Contact module:
 [Add](#)

[Save](#)

LiveChat Display Mappings

This module defines the fields to be pulled from Gold-Vision Leads and displayed in LiveChat

You can drag and drop fields to set the order in which they are displayed in LiveChat

Pre Text	Gold-Vision Field	Post Text	Gold-Vision Object	
<input type="text"/>	Summary	is a Lead in Gold-Vision	Lead	Delete
<input type="text"/>	Job Title	<input type="text"/>	Lead	Delete
<input type="text"/>	Contact Phone	<input type="text"/>	Lead	Delete
Last action on record was	Last Action Date	<input type="text"/>	Lead	Delete

Add a field from the Lead module:
 [Add](#)

[Save](#)

- Give your Users access to **create new Gold-Vision items** by setting their LiveChat login email in their Gold-Vision user profiles.

Users > Users > Users

User - Calum Mackay

 This is a Gold-Vision User. This user is a System Administrator. System Administrators bypass the Gold-Vision Account security as well as any field-level security. Access Options' page.

First Name:	Calum
Last Name:	Mackay
Job Title:	
Department:	
NT Account:	esteiro\chmackay
Primary Team:	Core Team
User Level:	System Administrator
External ID:	
LiveChat Login:	calum@esteiro.co.uk
Mail Tracking Details:	
Mail Tracking Folders:	*
Max Sensitivity:	Confidential
Address Lookup Details:	
Calendar Settings:	(click ellipsis to edit)
Phone System:	Not Set
Phone Country:	UNITED KINGDOM
Template Folder:	
Date Format:	[default]
Numeric Format:	