

Live Assist for 365 Setup Guide

This guide will walk you through the steps for setting up Live Assist on Dynamics 365 and show you how to launch your first chat engagement.

Live Assist for Dynamics 365 offers a free 30-day trial. After a quick sign-up, you'll have access to the app's premium subscription plan key features. Live Assist is tightly integrated with the Dynamics 365 Customer Service module. If you are not already a Microsoft Dynamics 365 customer, you can sign up for a Dynamics 365 trial [here](#), otherwise keep reading.

INSTALLATION ROADMAP



Prerequisites

Meet the minimum requirements for a Dynamics 365 instance and installation user.



Start a trial

Head over to Microsoft AppSource to start a free trial and install Live Assist.



Run Diagnostics

Check your installation by running the Live Assist diagnostics.



Launch your first chat engagement

Use our demo site to make your first chat engagement.



Before installing Live Assist for Dynamics 365, ensure the following:

- That your Dynamics 365 instance meets the minimum requirements.
- That your installation user is an
 1. Office 365 Global Administrator with
 2. Dynamics Systems Administrator privileges and
 3. Has a configured first and last name in Office 365.

More of a visual person?



Watch this [Getting Started](#) video for step-by-step instructions.

Tip: See [Live Assist Feature Guides](#) for tutorials on how to make the most out of Live Assist's features.



Take a quick look at our [Do's and Don'ts](#) article to avoid any installation pitfalls.


 The steps to verify the user permissions are included in the [Starting a Trial](#) article.

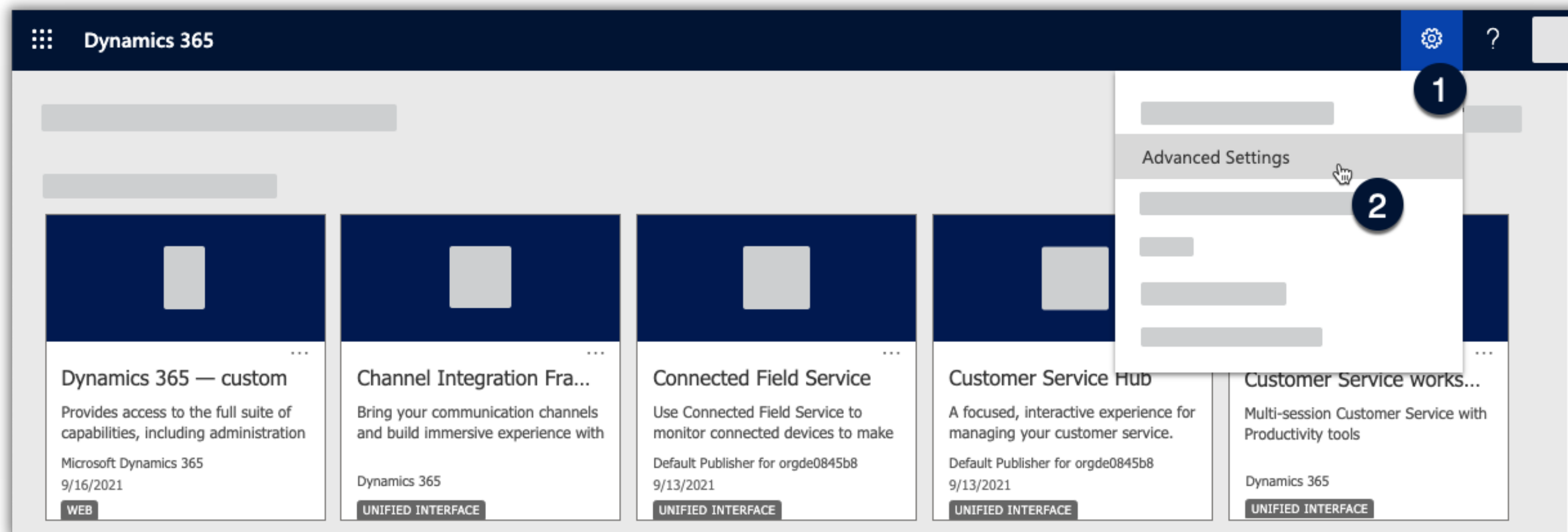
Now, you can start a free trial and install Live Assist.



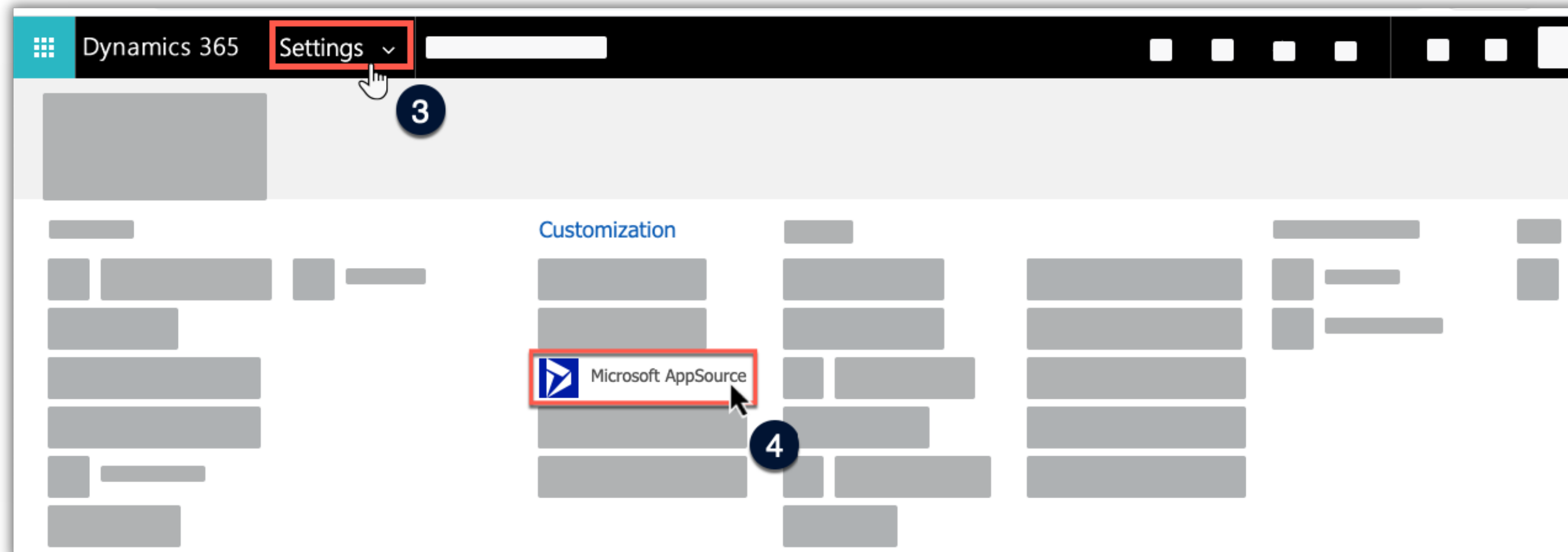


To start a free Live Assist Trial:

- In Dynamics 365, click the cog > **Advanced Settings**.
-  To access Dynamics 365, enter your org URL from your web browser and sign in. Your org URL has a format of `https://x.crm.y.dynamics.com`. Where **x** is your organization name and **y** is your [region instance](#).

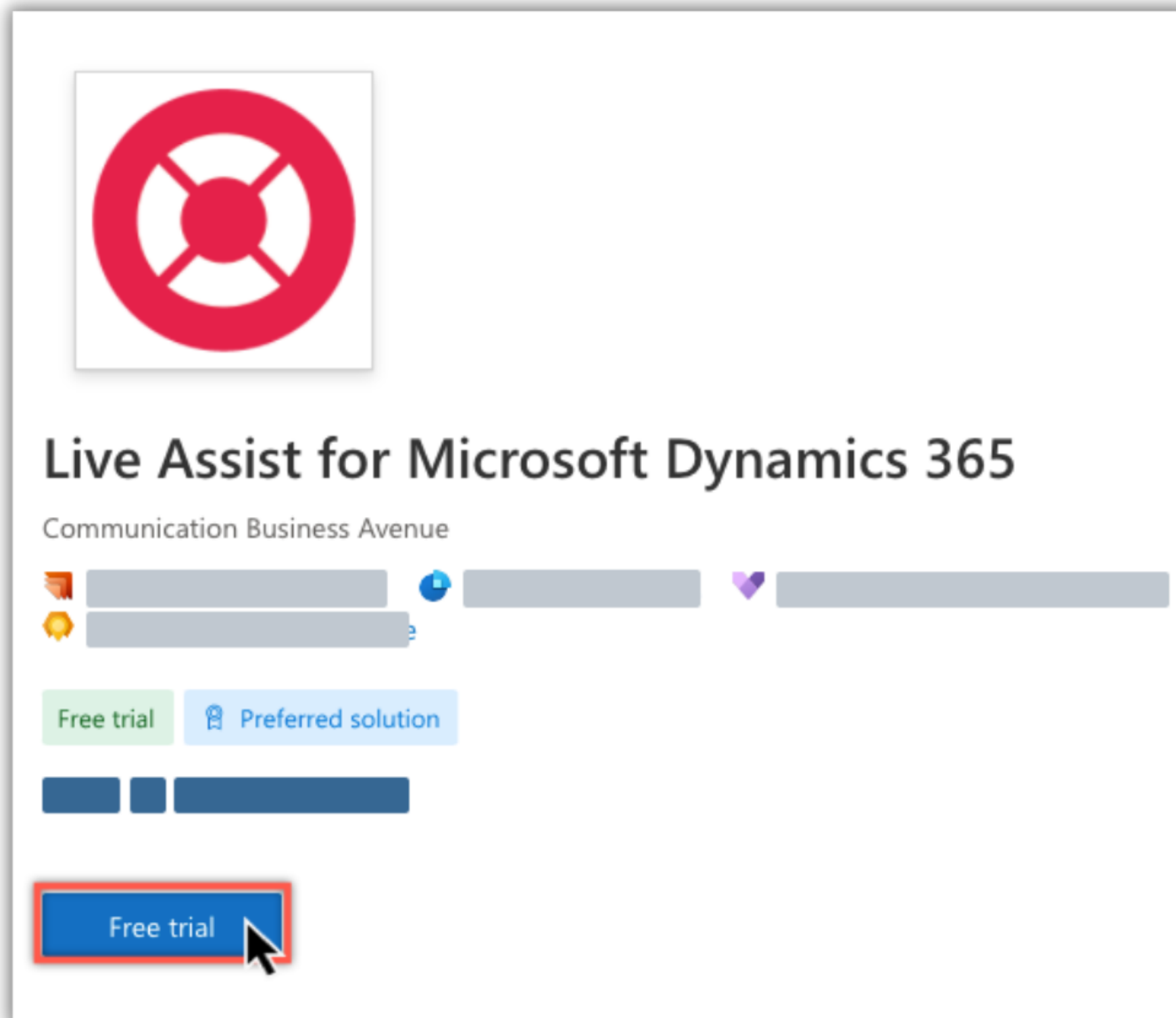


- Then go to the **Settings** menu > **Microsoft AppSource**.

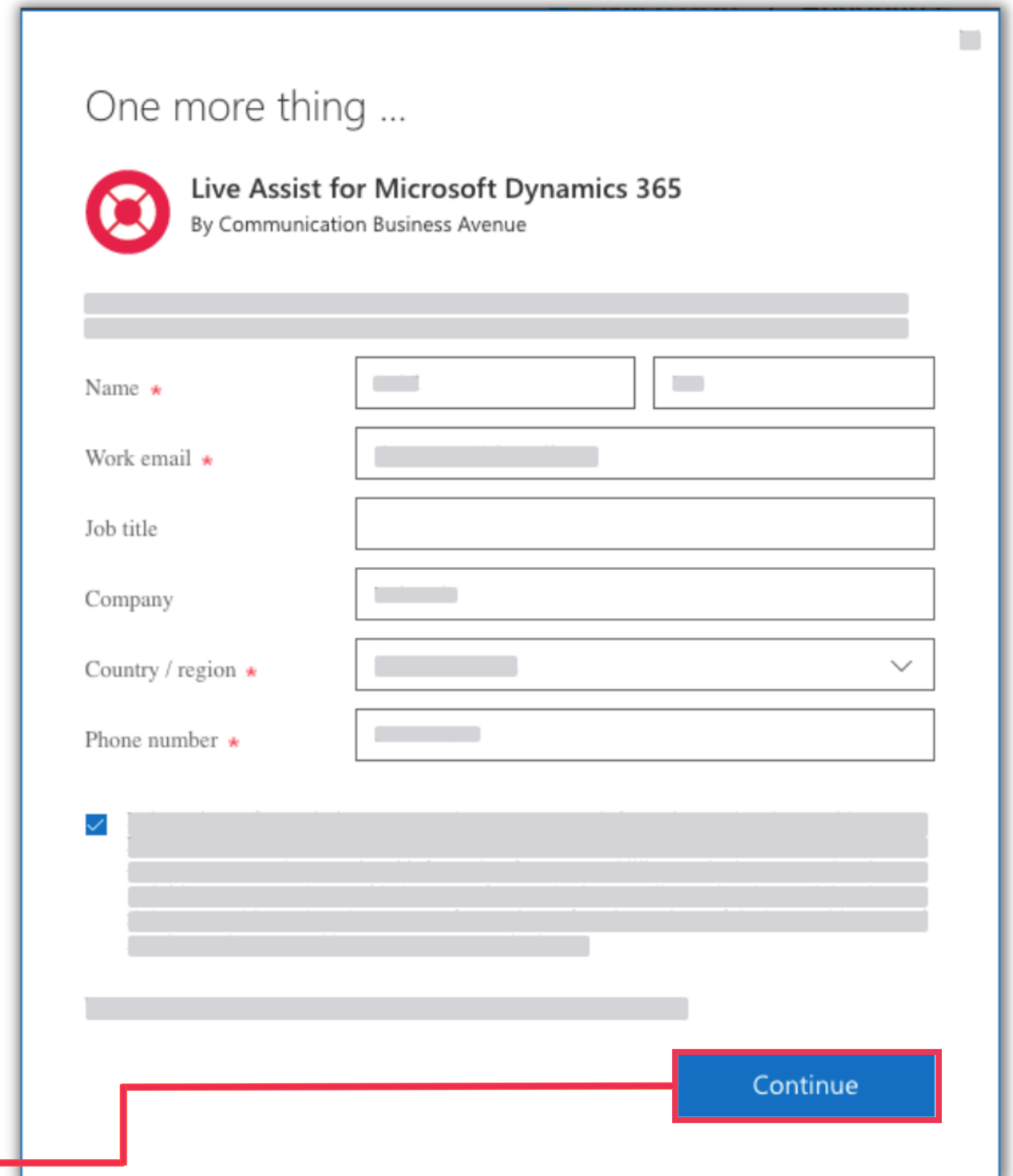




- The Live Assist AppSource listing will open in a new window. Look for Live Assist..., and click **Free Trial**:

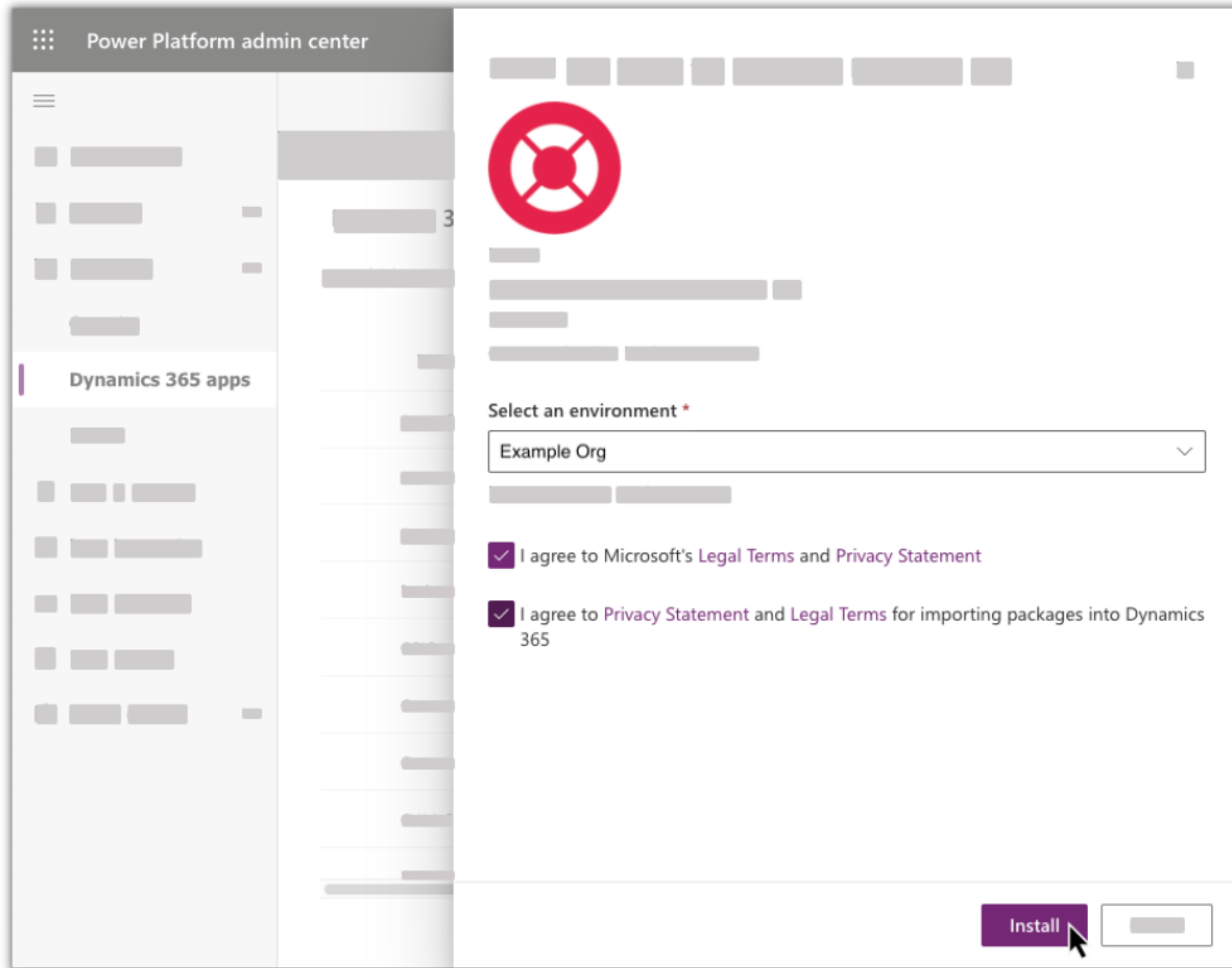


- Sign in to your MS account, fill in the required information, then agree to the terms and conditions. Click **Continue**:





- Type or Select from the dropdown menu the environment that you want to connect Live Assist to.
- Check the boxes to agree to the legal terms and privacy statements, then click **Install**:

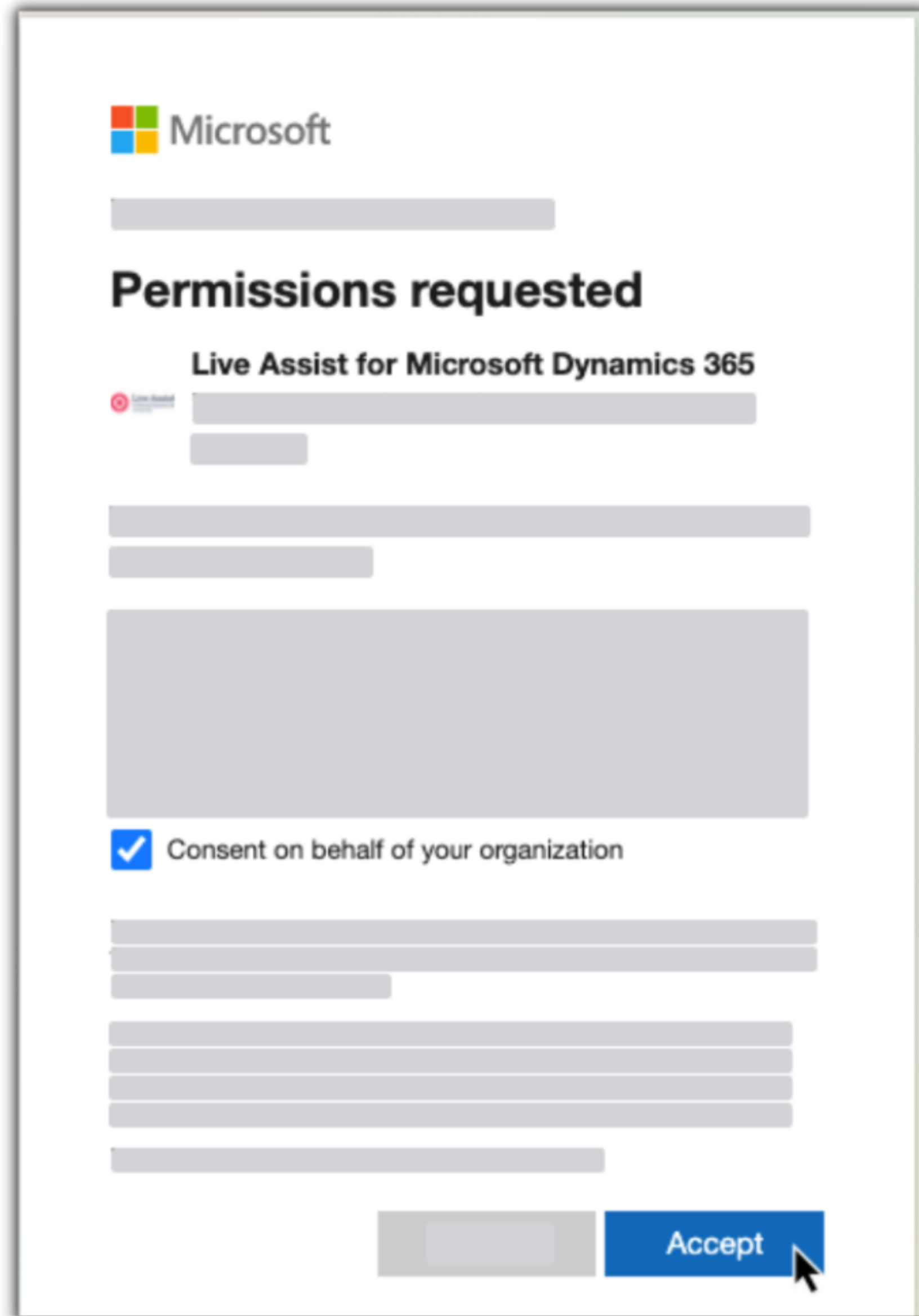




- There is a request for permissions you must **Accept**.

Then Live Assist set-up form will open in a new browser tab.

i Throughout the installation process, you may see the same consent prompt. Just accept the permissions and proceed.





- Select the Dynamics 365 instance from the list and enter your contact email address.
 - a. If your organization does not intend to use Unified Service Desk (USD), leave the box for USD unchecked.
 - b. If you intend to use Unified Service Desk, see: [Installing USD](#)
- Then submit the form. A message is displayed to inform you that provisioning is in progress.

Live Assist for Dynamics 365
Powered by CBA

Select Microsoft Dynamics 365 Instance

Microsoft Dynamics 365 Instance
✓ Example Org

Contact email address

Include Unified Service Desk support for Live Assist Powered by CBA

CBA Software License Terms

TERMS OF SERVICE

Accept the CBA Software License Terms and Privacy Statement.

Submit



If you intend to use USD, you have the following options:

- Install Live Assist for Web Client First. Leave the box unchecked and submit the form. Allow the provisioning process to complete. Then provision the USD, return to this form, check the box and resubmit.
- Install Live Assist for Web Client and USD simultaneously. Leave this page and provision the USD. Then return to this page and you should see this checkbox enabled (you may need to refresh the page). Check the box and submit the form.




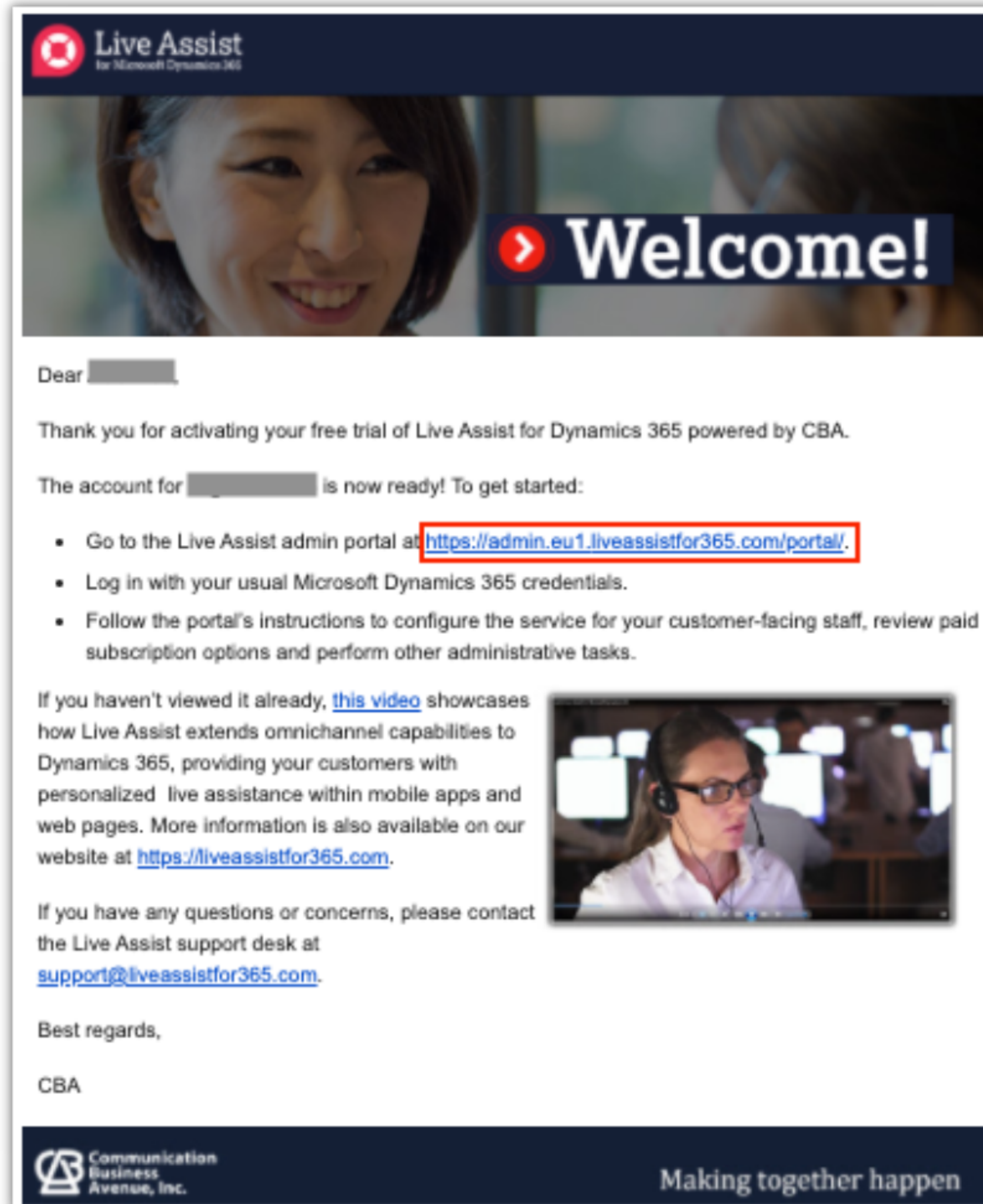


Complete the provisioning process and then... you're done with the installation!

- Normally within an hour (although it sometimes takes longer), Live Assist Support sends you an email similar to the following example.

Follow the instructions in the email by going to the **Live Assist admin portal** to complete the provisioning process.

 Steps to login to the Admin Portal from Dynamics 365 are outlined [here](#).





- Also to access the portal fully, you must provide your sign-up details:

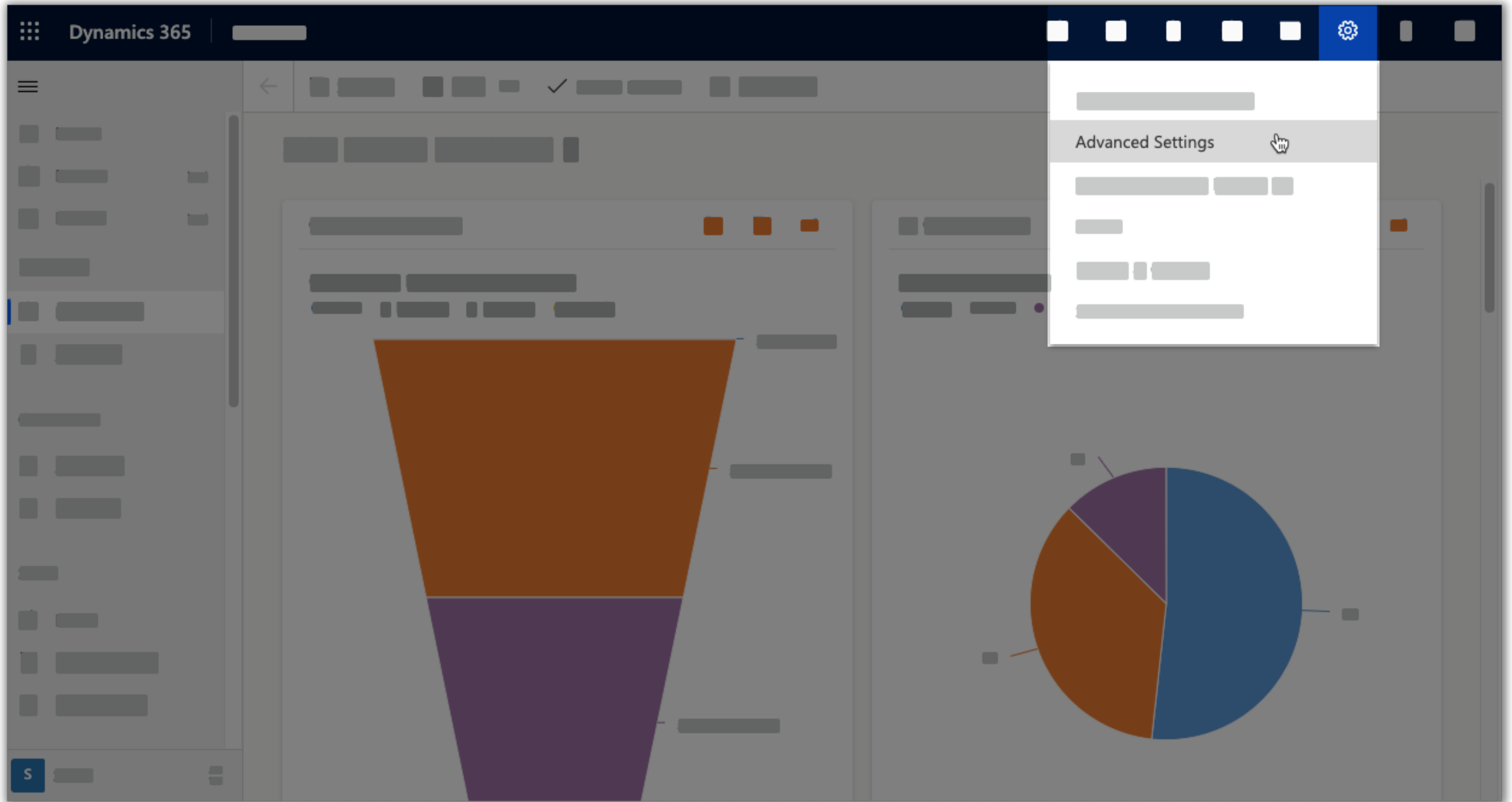
The screenshot shows a web form for 'Live Assist for Microsoft Dynamics 365'. The form is titled 'Welcome! Please confirm the following contact details.' and contains several input fields: 'First Name*' with 'Example', 'Last Name*' with 'User', 'Company Name*' with 'Example', 'Email*' with 'sample@gmail.com', 'Country*' with a dropdown menu showing 'United Kingdom', and 'Phone Number*' with '1234567891'. At the bottom, there are two radio buttons: 'I'm a CBA Partner' (unchecked) and 'I'm a CBA Customer' (checked). A red button labeled 'CONFIRM AND AUTHORIZE' is positioned at the bottom of the form.





You can now verify your installation using our Diagnostic tool.

- In **Dynamics 365**, click the cog > **Advanced Settings**

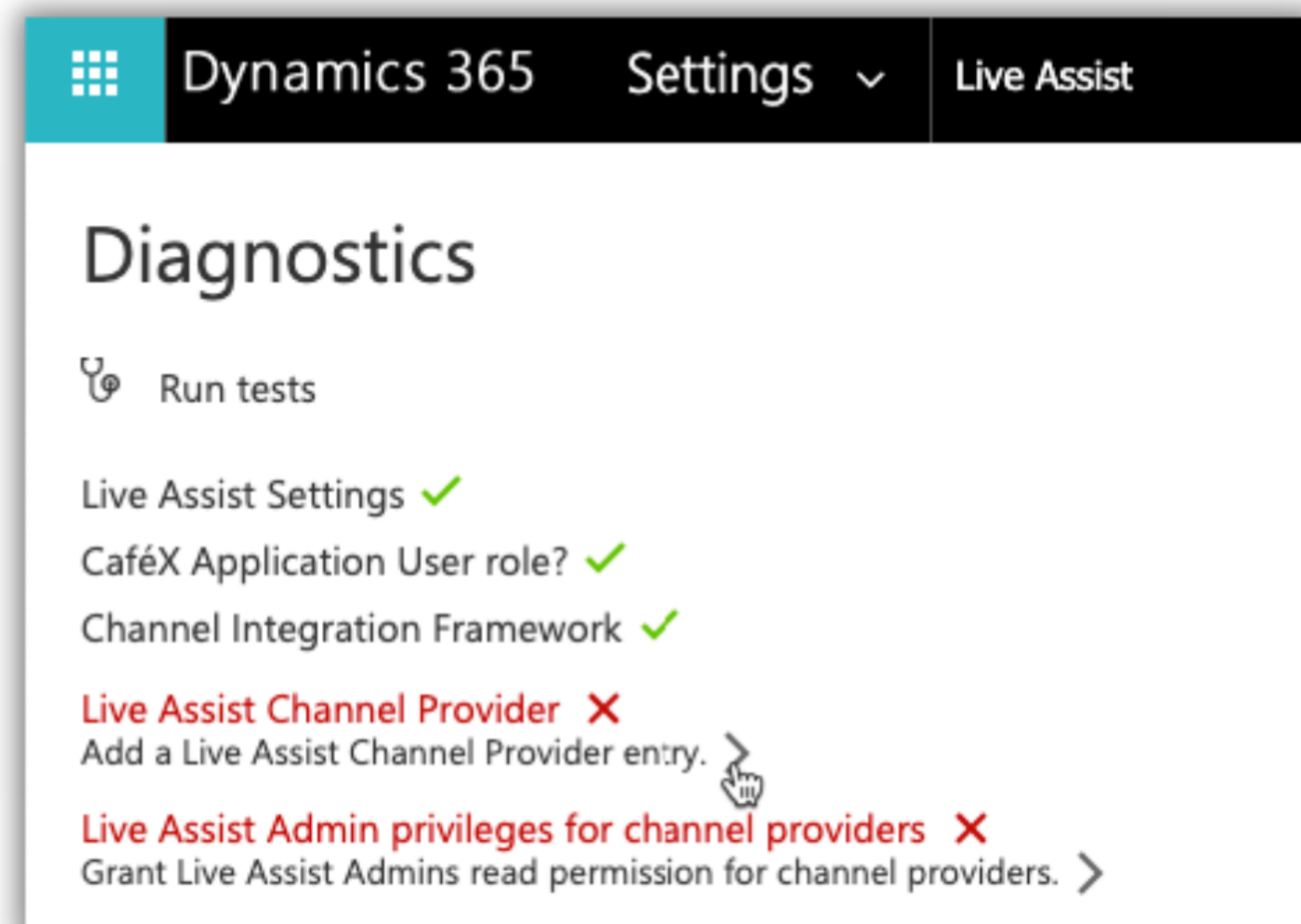




- Go to the **Settings** menu and select **Live Assist**.



- This will bring up a Diagnostics window. Please click on **Run tests**.
- If you encounter this error, just click the **"Add a Live Assist Channel Provider entry. >"** and this will open a new window to setup the Channel Provider.





- At the *Select Unified Interface Apps for the Channel* section, **select all apps**. Then **remove** the **Project Service**, **Customer Service workspace**, and **Omnichannel for Customer Service** for **Customer Service** apps.
- **Save** your entries.

The screenshot shows the Dynamics 365 Channel Integration Framework configuration page. The page title is "New Channel Integration Framework" and the sub-section is "Channel Provider Configuration". The configuration details are as follows:

Name	Live Assist for 365
Label	Live Assist for 365
Channel URL	https://service.e...
Enable Outbound Communication	Yes
Channel Order	1
API Version	1.0
Trusted Domain	https://orgde08...
Custom Parameters	---

The "Select Unified Interface Apps for the Channel" section contains a list of apps with the following items highlighted in red boxes:

- Customer Service workspace
- Omnichannel for Customer Service
- Project Service

The "Select the Roles for the Channel" section shows "Live Assist Agent" selected.

Annotations on the screenshot:

- 2** Enable Outbound Communication (points to the "Enable Outbound Communication" field)
- 3** Then Save your entries (points to the "Save" and "Save & Close" buttons)
- 1** Remove the Project Service App, Customer Service workspace, and Omnichannel for Customer Service app. (points to the highlighted app list)

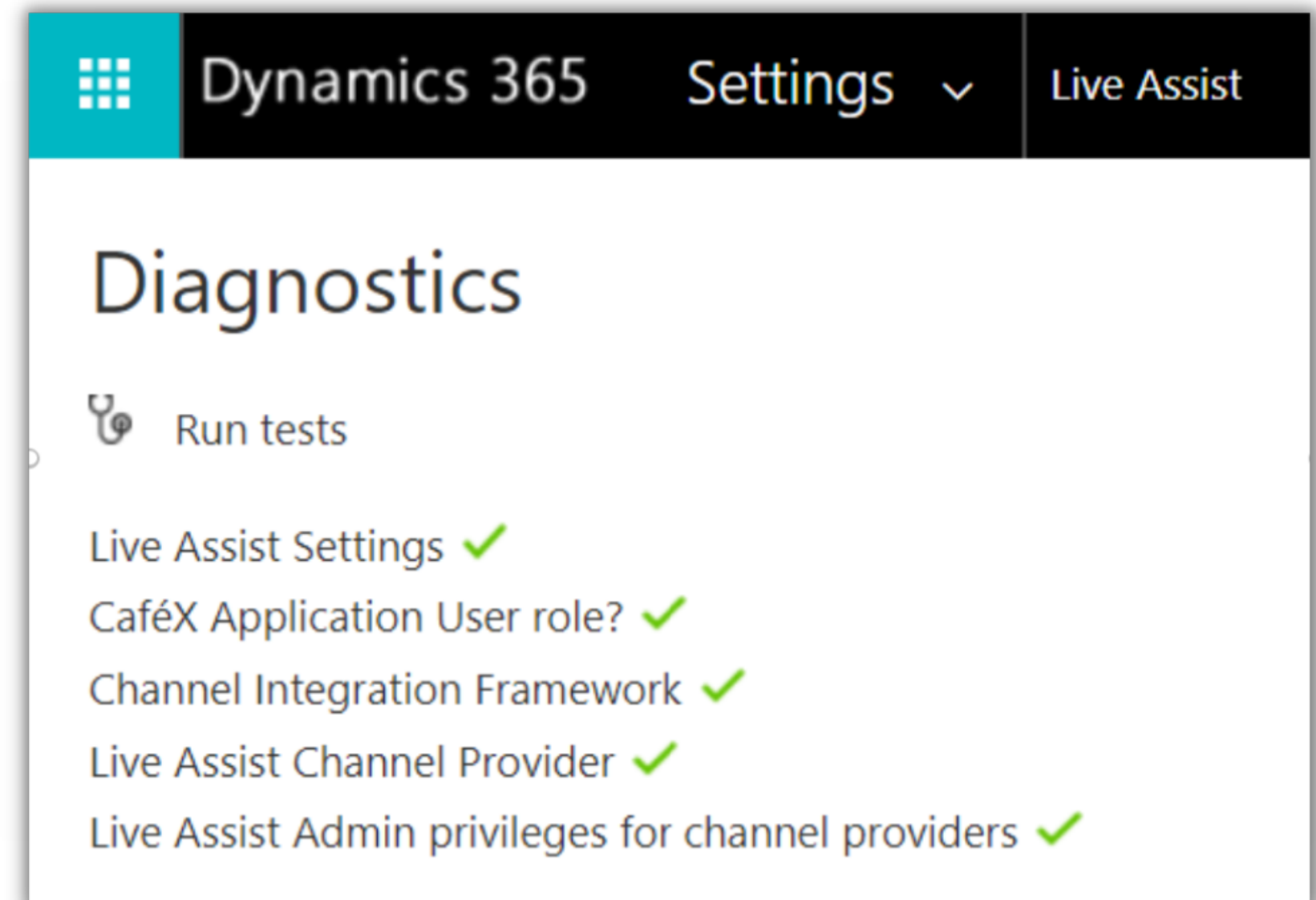
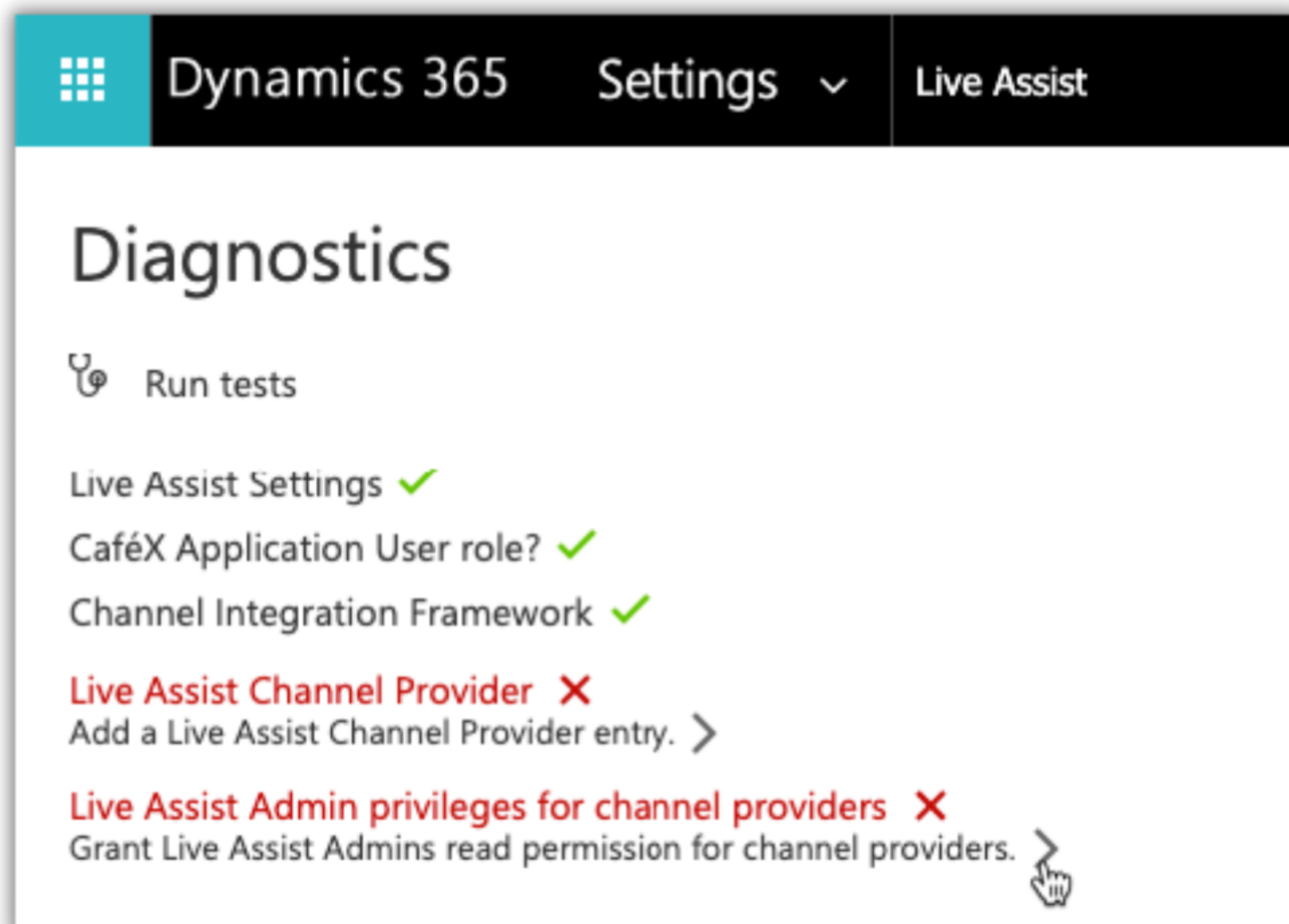
i Omnichannel for Customer Service and Customer Service workspace apps may not be present in your environment.





- Go back to Diagnostics window, then click "**Grant Live Assist Admins read permission for channel providers. >**"

- Now run the tests again to make sure all items on the list are configured.



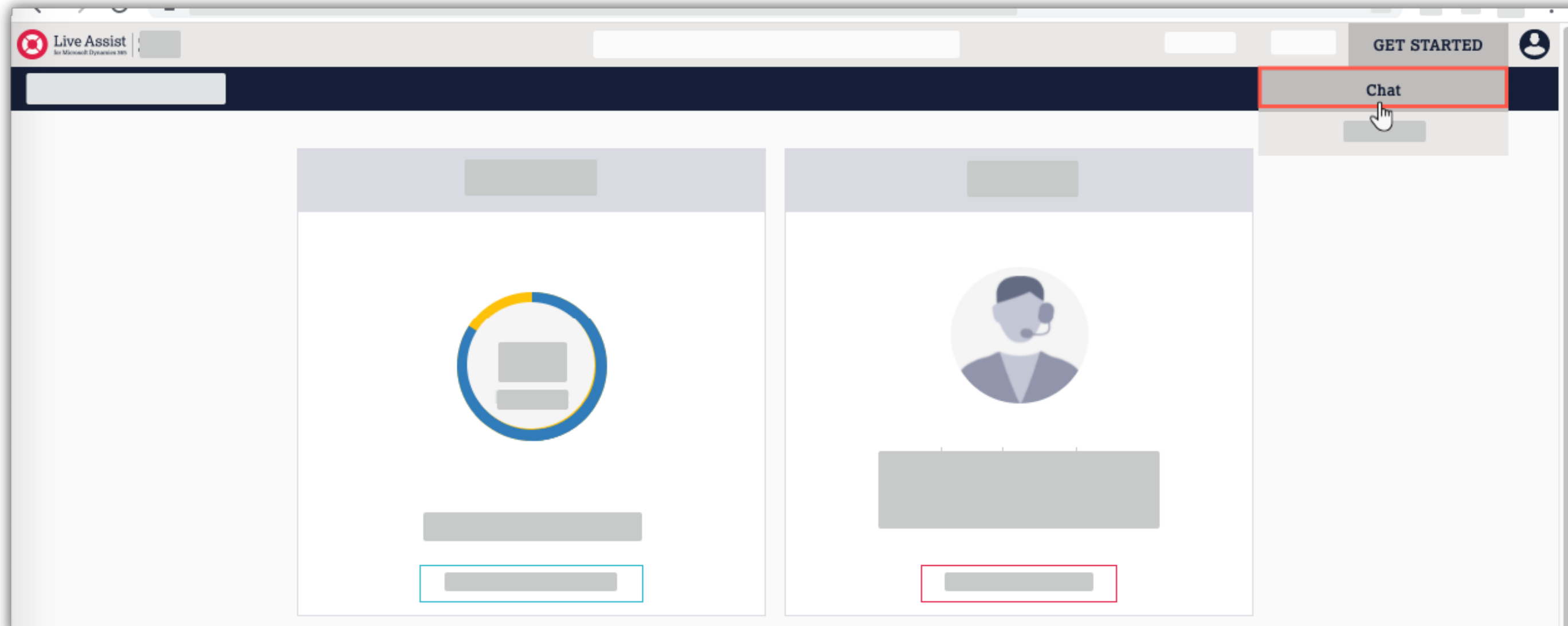
i You need to configure the channel provider to display the Live Assist panel. Running the Live Assist Diagnostics creates a channel provider record with prepopulated data. Another way to configure the Live Assist Channel Provider manually can be found [here](#).



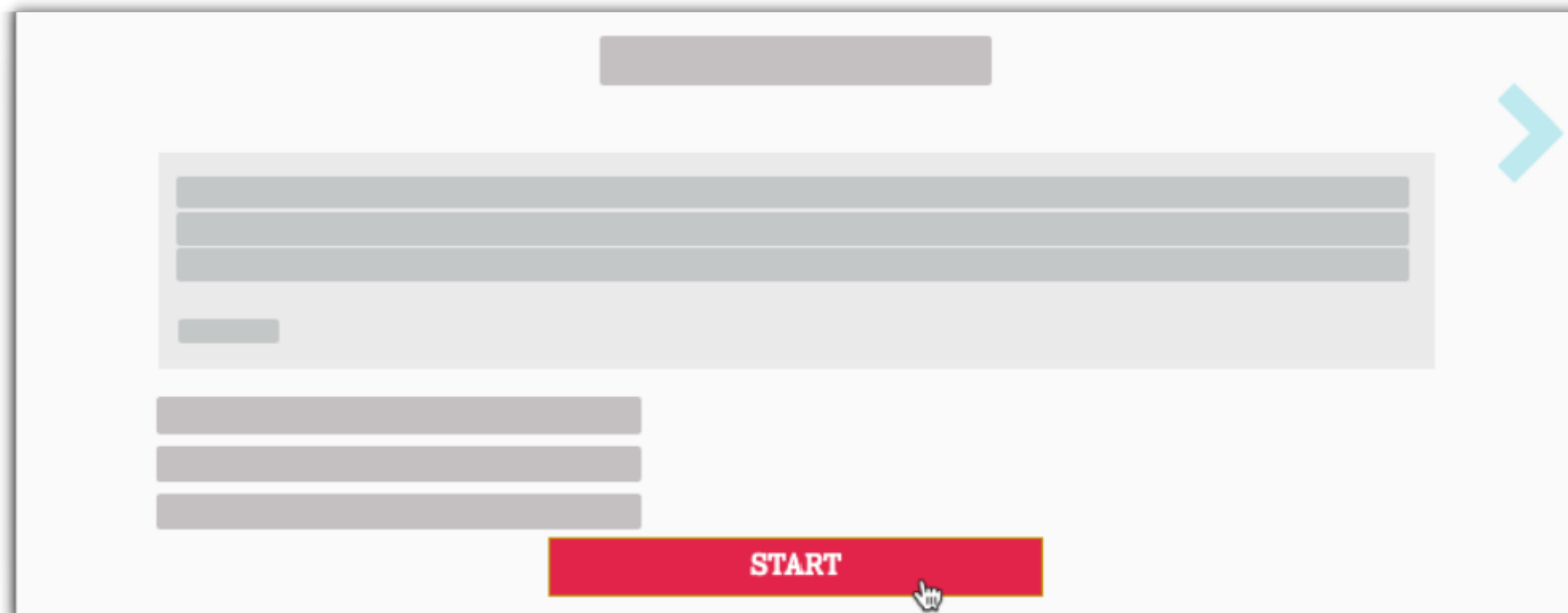


The steps below will guide to start your first chat engagement.

- To access the test links, go to the **Live Assist admin portal** and click **Get Started > Chat**:



- Click **Start**:





- Click **Continue**:

A screenshot of a software installation wizard. The title is "Add The Code Snippet To Website" in blue. The screen contains several greyed-out text fields and a red button labeled "CONTINUE" at the bottom center. A mouse cursor is hovering over the "CONTINUE" button. There are light blue left and right navigation arrows. A note at the bottom of the content area reads "In Step 3 you'll launch the Dynamics CRM Web Client..."

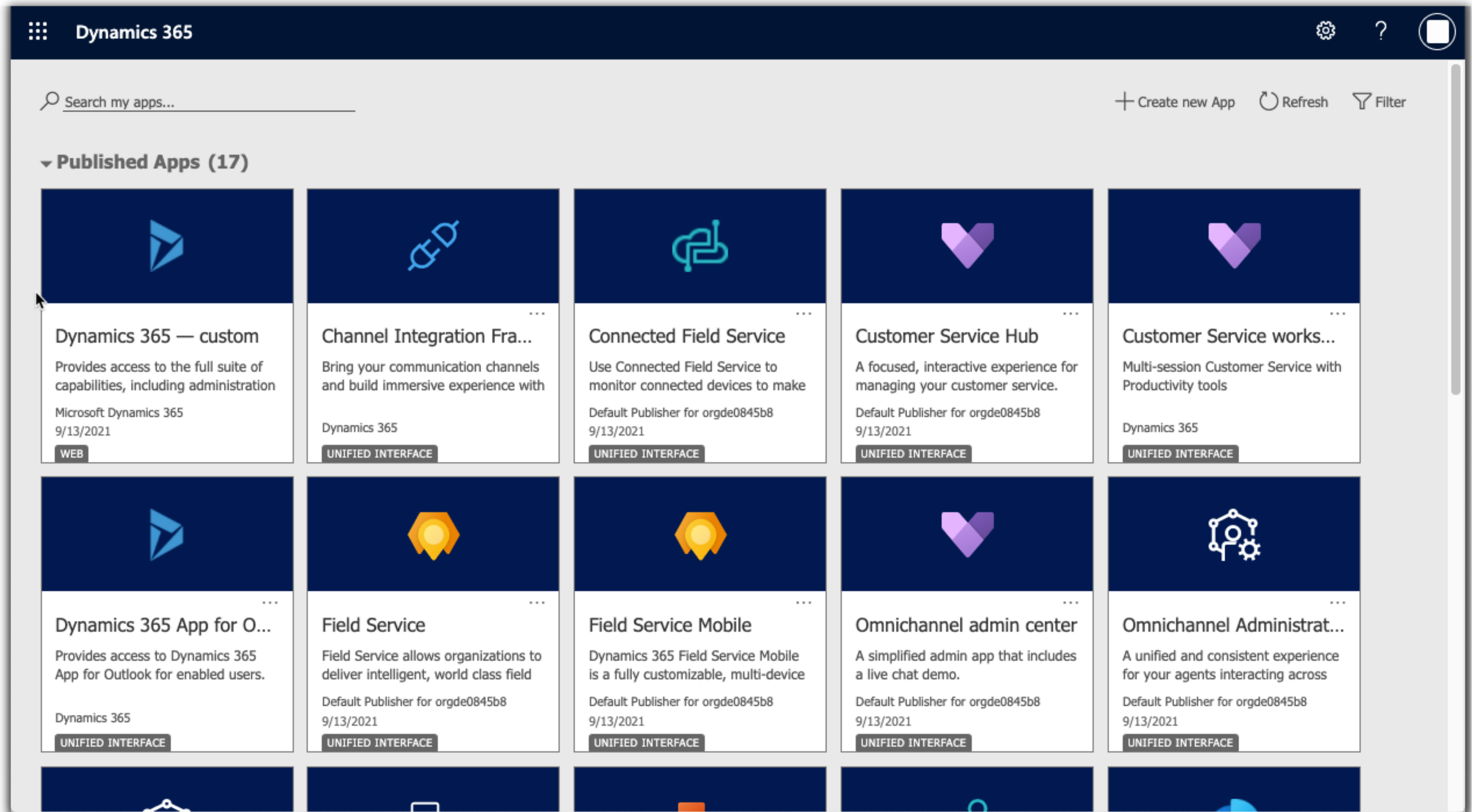
- Click **Launch Dynamics 365**:

A screenshot of a software installation wizard. The title is "Open Live Assist For Dynamics 365" in blue. The screen contains several greyed-out text fields and a yellow button labeled "LAUNCH DYNAMICS 365" at the bottom center. A mouse cursor is hovering over the "LAUNCH DYNAMICS 365" button. There are light blue left and right navigation arrows.



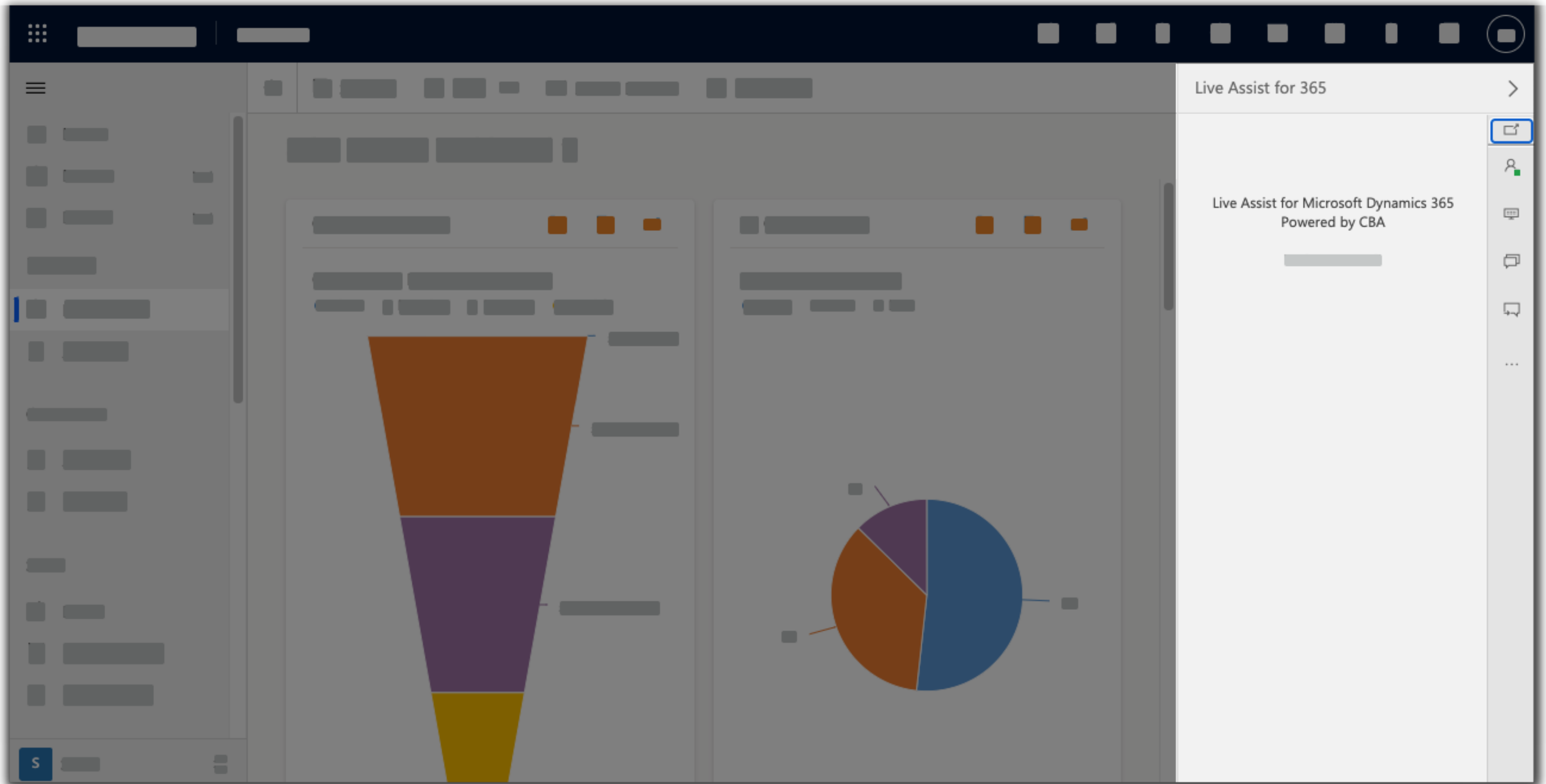


- In a new browser tab, Dynamics 365 opens with the installed unified interface apps.





- Select an app, e.g. Customer Service Hub, to display the Live Assist panel on the right side.



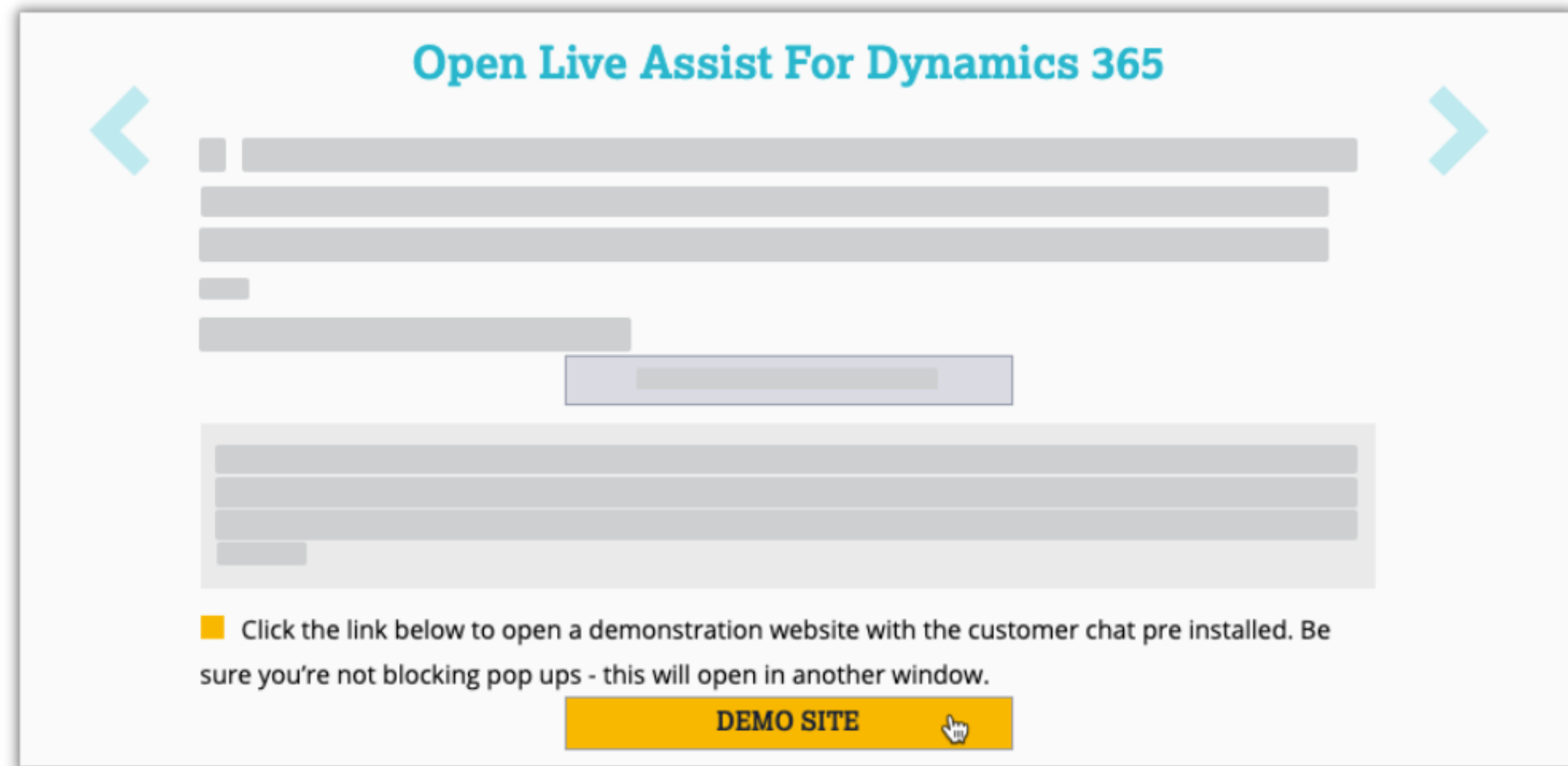
 If the Agent widget doesn't load and you have a newer Dynamics 365 environment, you may need to follow some additional steps [here](#).





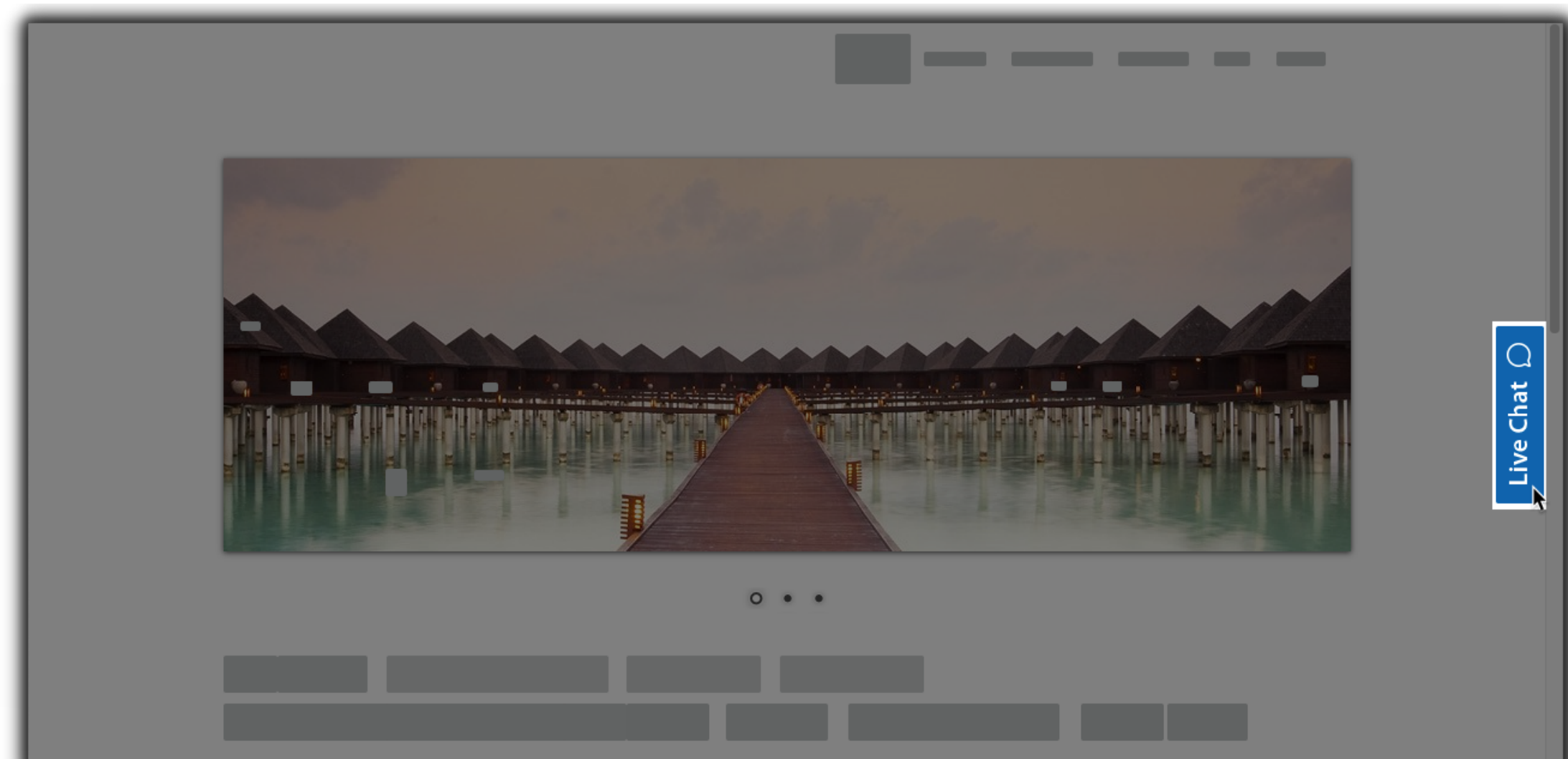
If you don't have access to your site's source code, you can try the Live Assist features in our demo site.

- Go back on the Portal tab and click **Demo Site**.



- In a new browser tab, the demo Hotel site opens.

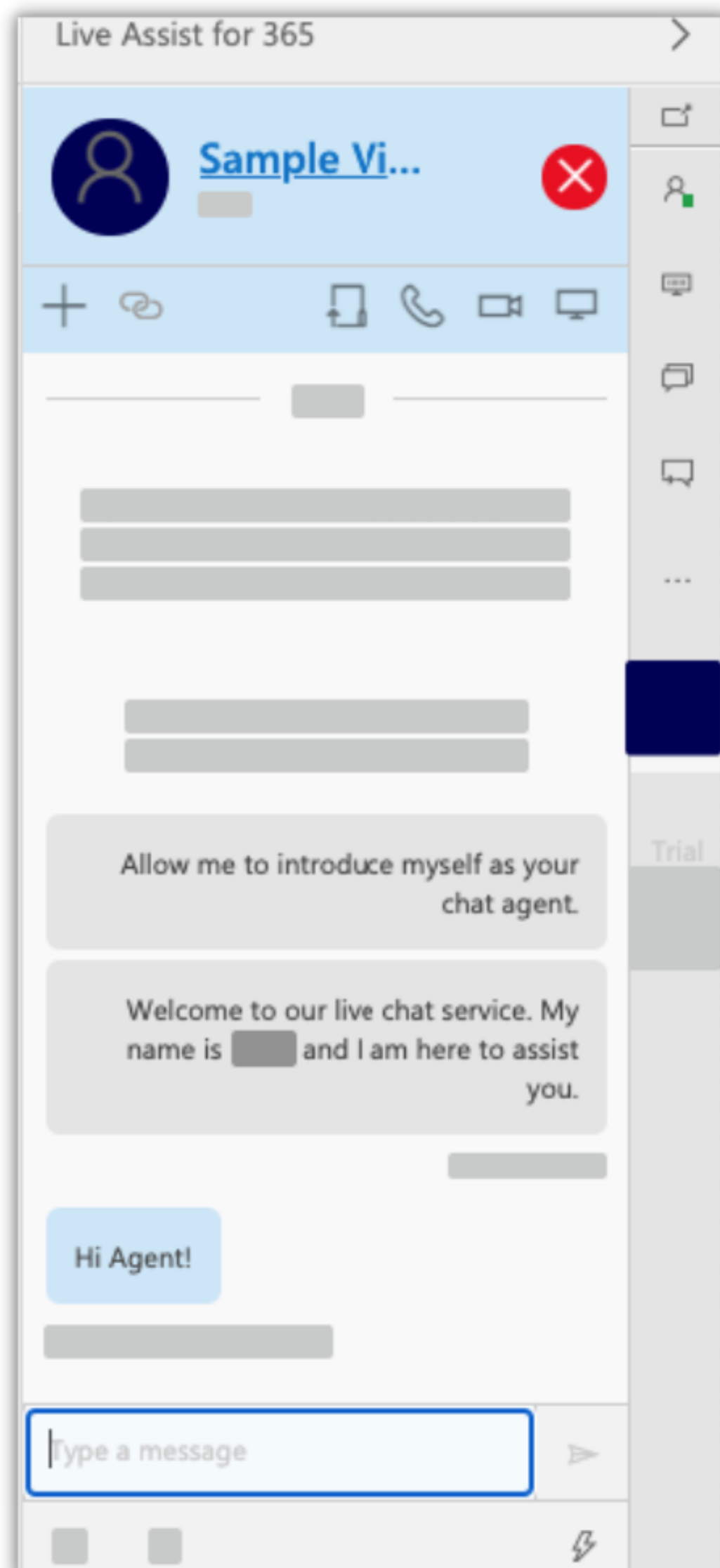
i Your organization's Live Assist tag is automatically embedded into the page for you.



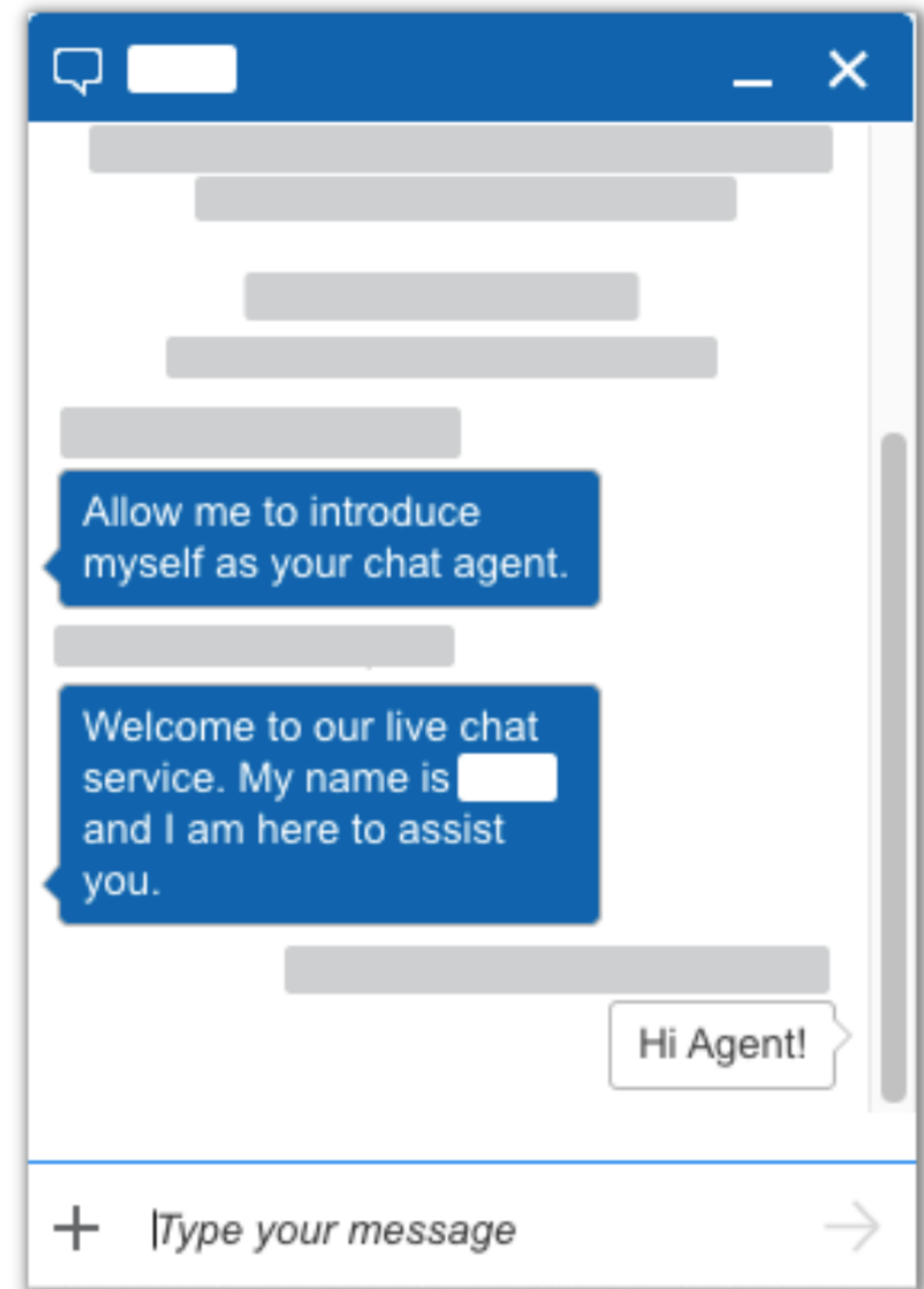


- In the Dynamics 365 and demo Hotel site browser tabs, enter comments and replies in the chat windows to see how a chat operates between an agent and a consumer.

Agent view of chat



Consumer view of chat




Congratulations on your first engagement!

What's next?

From here, you can explore other features like [co-browsing](#), [document sharing](#), [file transfer](#), and [voice and video calls](#).

Check out our [Live Assist Engagement Guides](#) to make the most out of Live Assist for Microsoft Dynamics 365 Engagements.

-  If you like what you see and decided to [buy](#), all the campaigns and engagements you've tested during the trial will transfer to your full account.

This guide is just one of the many [support resources](#) available to you at Live Assist. We hope this was helpful. Remember, if you face any issues along the way you can always reach us at support@liveassistfor365.com for relevant support.

