

Live Assist for 365 Setup Guide

This guide will walk you through the steps to set up *Live Assist* on Dynamics 365 and show you how to launch your first messaging engagement.

Live Assist for Dynamics 365 offers a free 30-day trial. After a quick sign-up, you'll have access to all of *Live Assist'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 need to sign up for a Dynamics 365 trial [here](#) first. Otherwise, please keep reading.

INSTALLATION ROADMAP



Prerequisites

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



Start a trial

Go 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 engagement

Use our demo site to make your first messaging engagement



Before installing *Live Assist for Dynamics 365*, make sure of the following:

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



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 [our Installation Guide article](#).

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

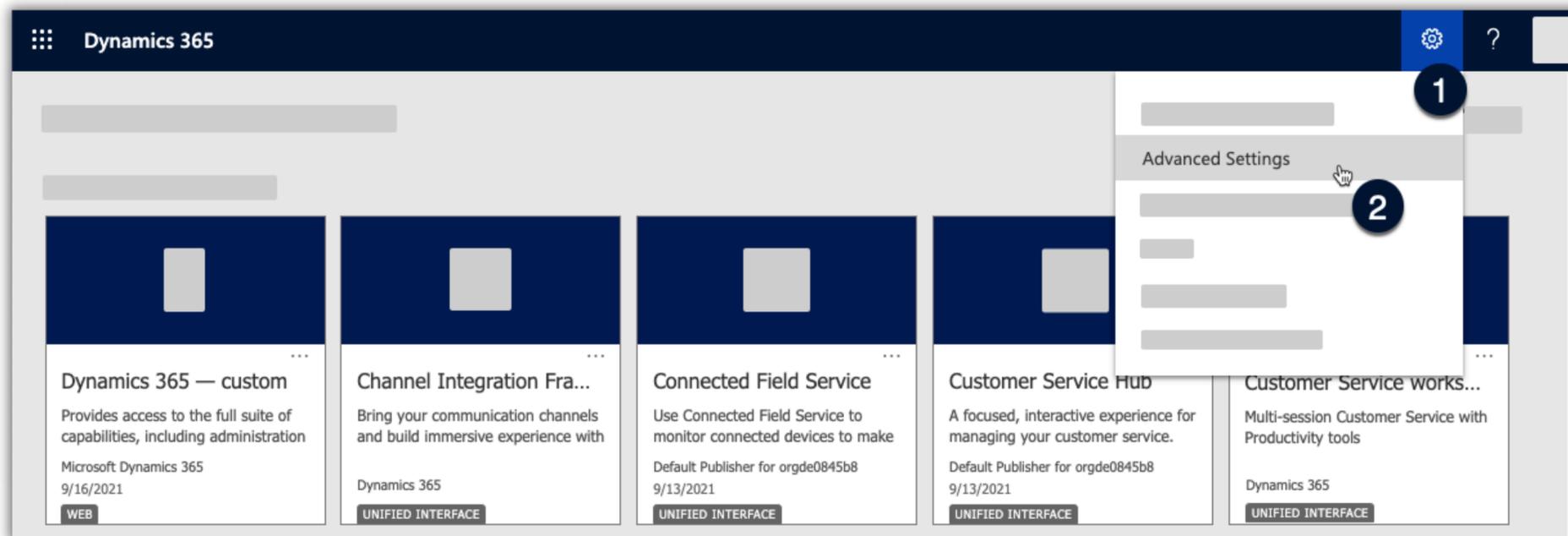




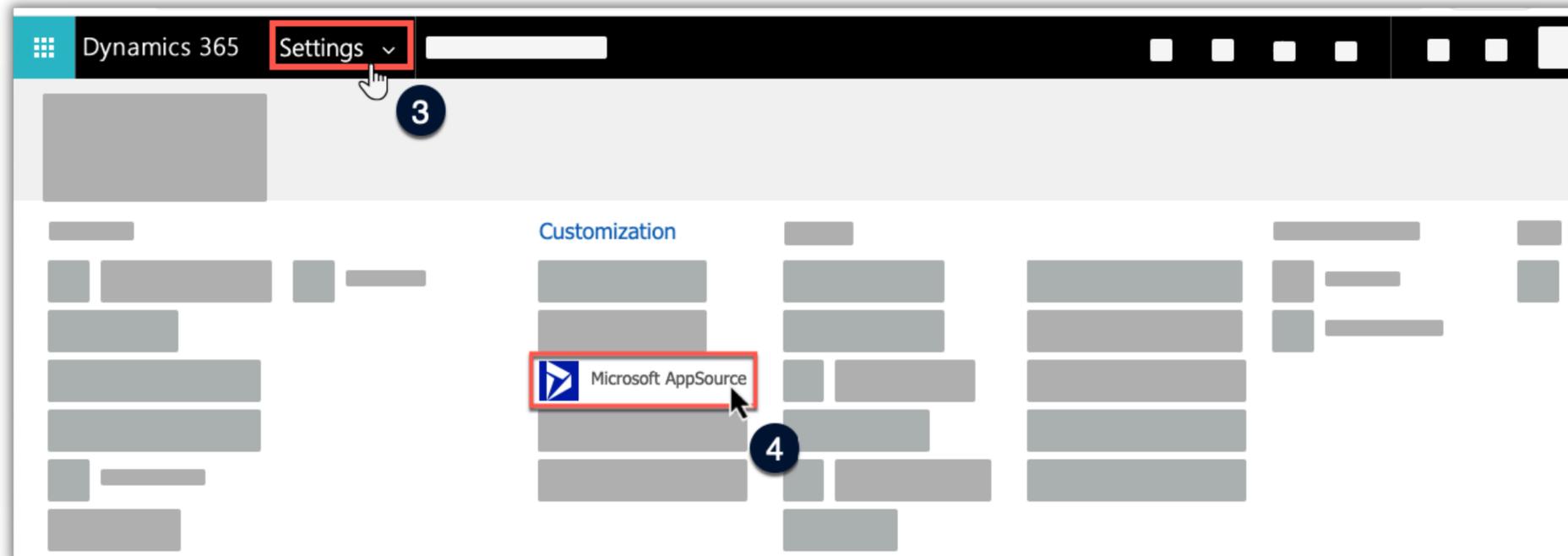
To start a free *Live Assist* Trial:

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

i 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](#).

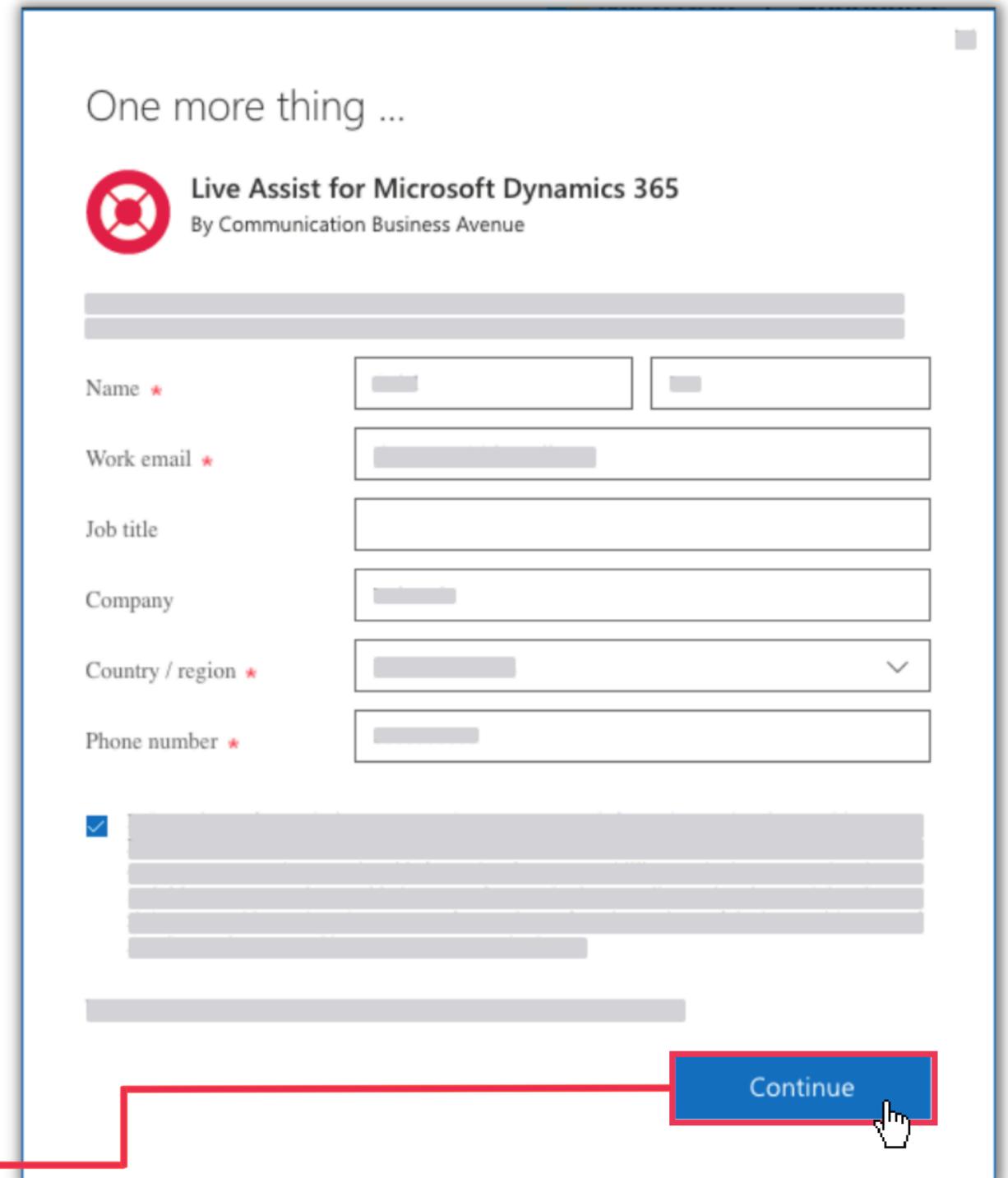
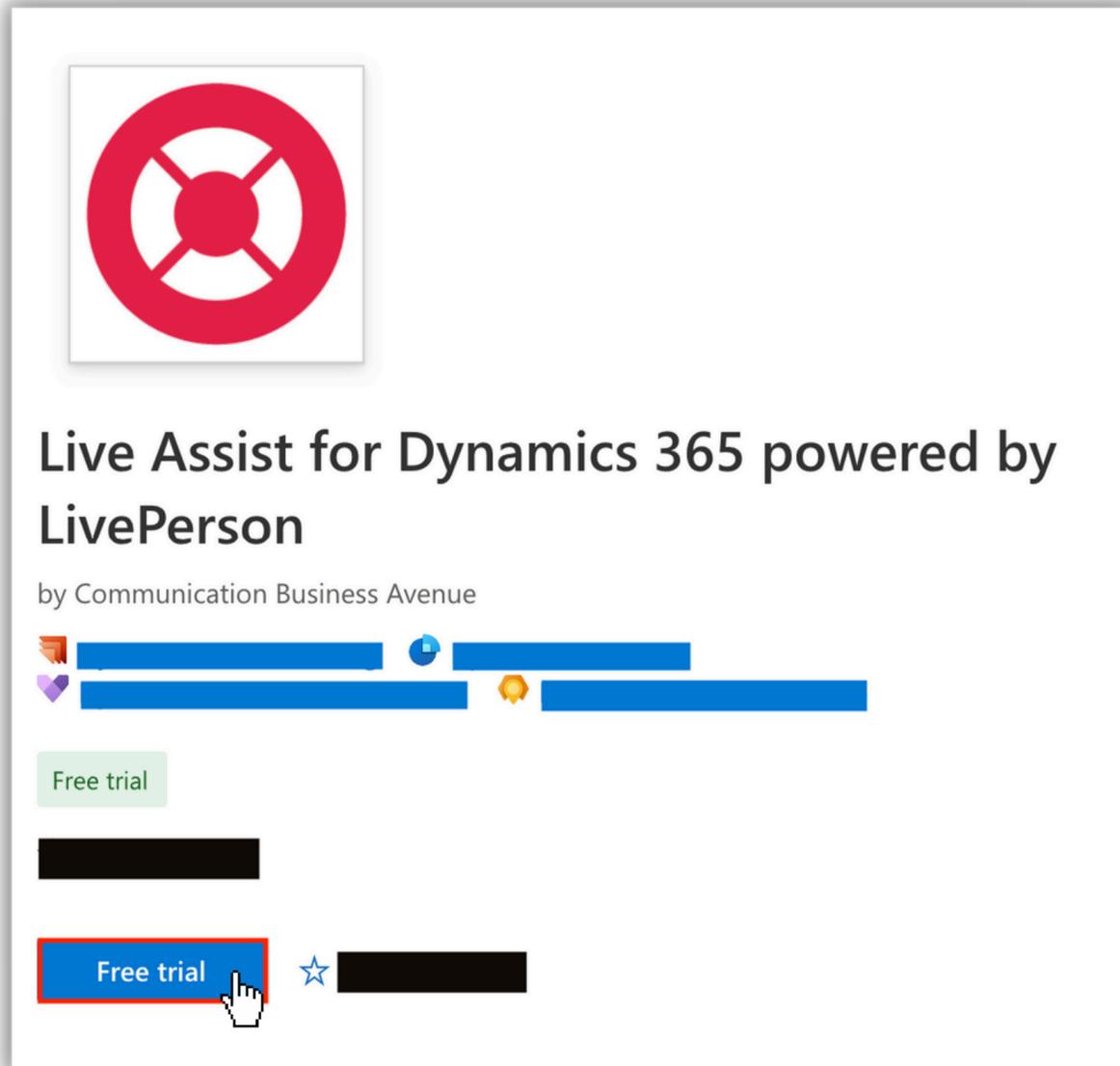


- Then go to the **Settings** menu > **Microsoft AppSource**.





- The *Live Assist* AppSource listing will open in a new window. Search for “*Live Assist for Dynamics 365*” and then open it from the results. Then click **Free Trial**:

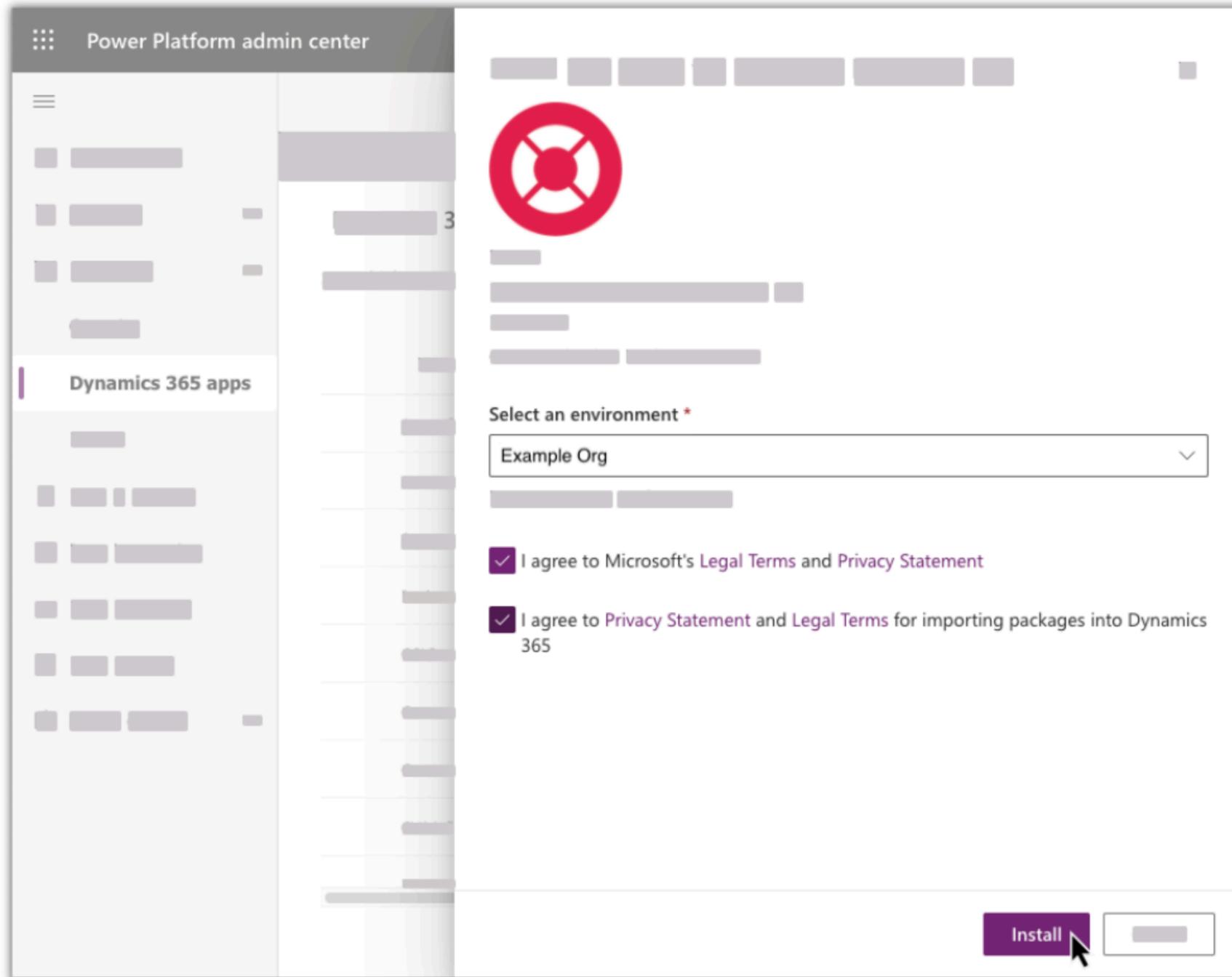


- Sign in to your MS account, fill in the required information, then agree to the terms and conditions. Click **Continue**:





- 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**:

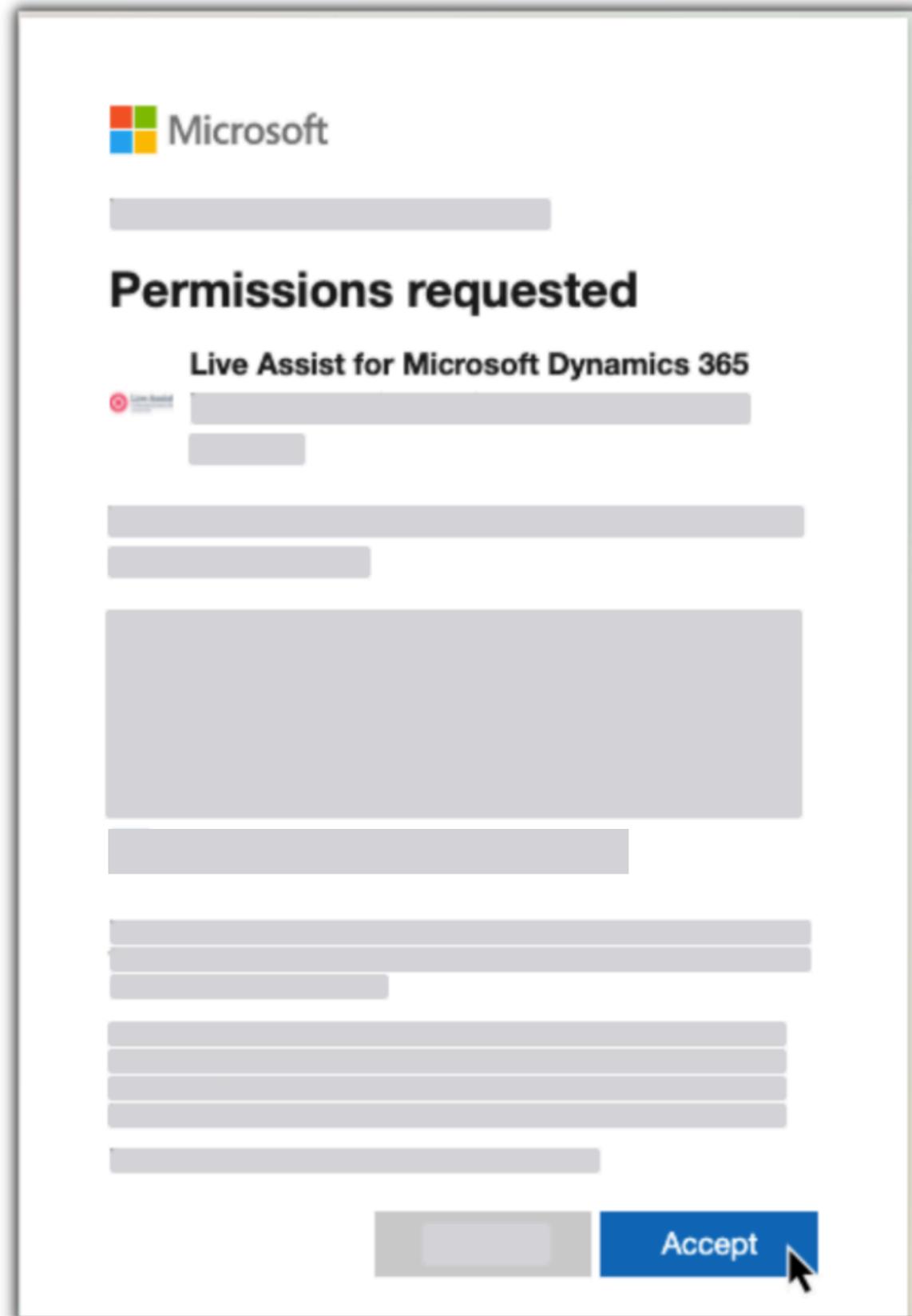




- There is a request for permissions you must **Accept**.

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

i Throughout the installation process, you may see the same consent prompt. You must accept the permissions to 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 LivePerson

Select Microsoft Dynamics 365 Instance

Microsoft Dynamics 365 Instance
✓ Example Org

Contact email address

Include Unified Service Desk support for Live Assist Powered by LivePerson

CBA Software License Terms

TERMS OF SERVICE

Accept the CBA Software License Terms and Privacy Statement.

Submit

Powered by LivePerson and maintained by CBA.

i 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.



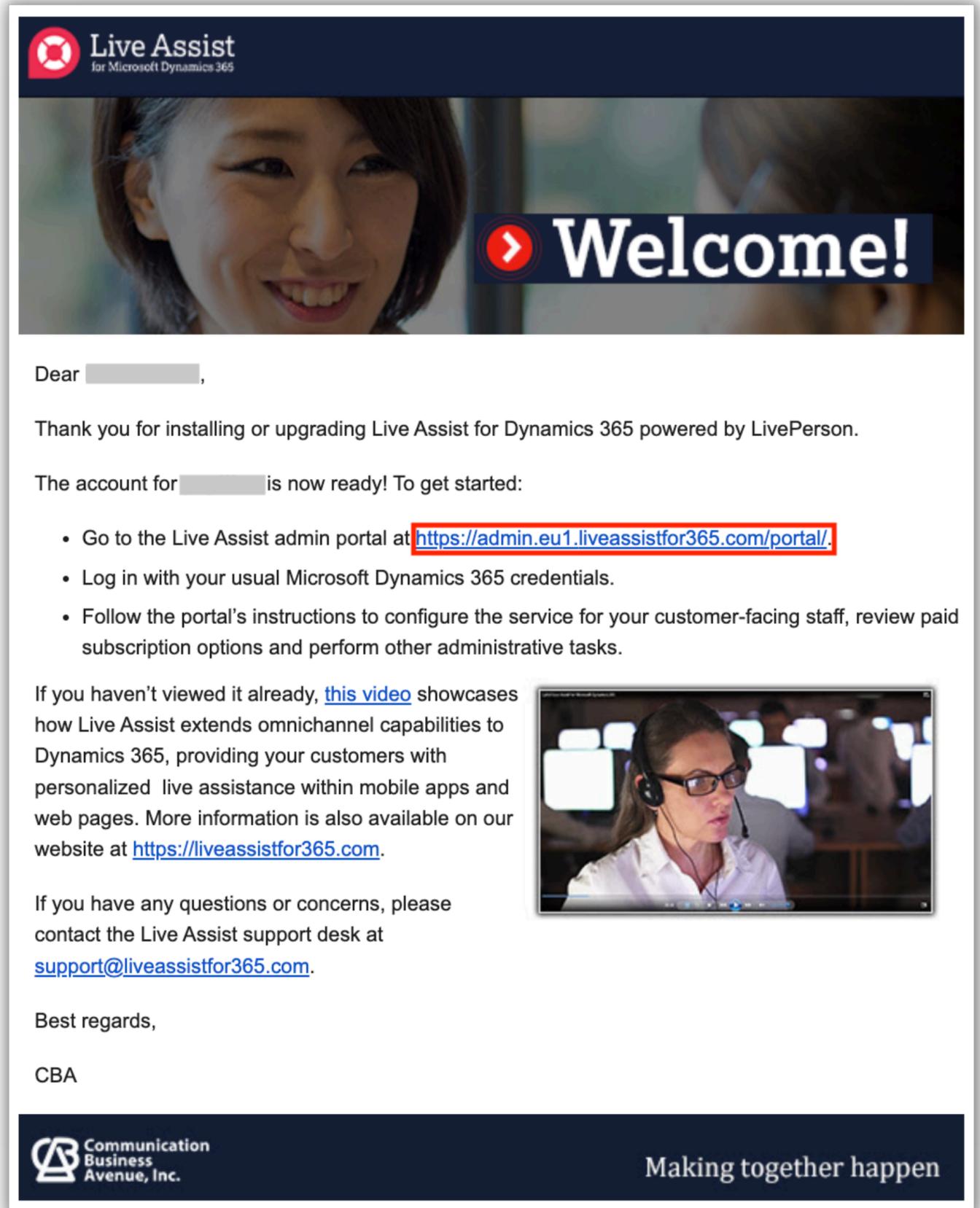


Complete the provisioning process and then... you're done with the installation!

- Within an hour (although it sometimes takes longer), *Live Assist* Support will send you an email similar to the example to the right.

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

i 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:

Live Assist
for Microsoft Dynamics 365

Welcome! Please confirm the following contact details.

First Name*
Example

Last Name*
User

Company Name*
Example

Email*
sample@gmail.com

Country*
United Kingdom

Phone Number*
1234567891

I'm a CBA Partner I'm a CBA Customer

CONFIRM AND AUTHORIZE

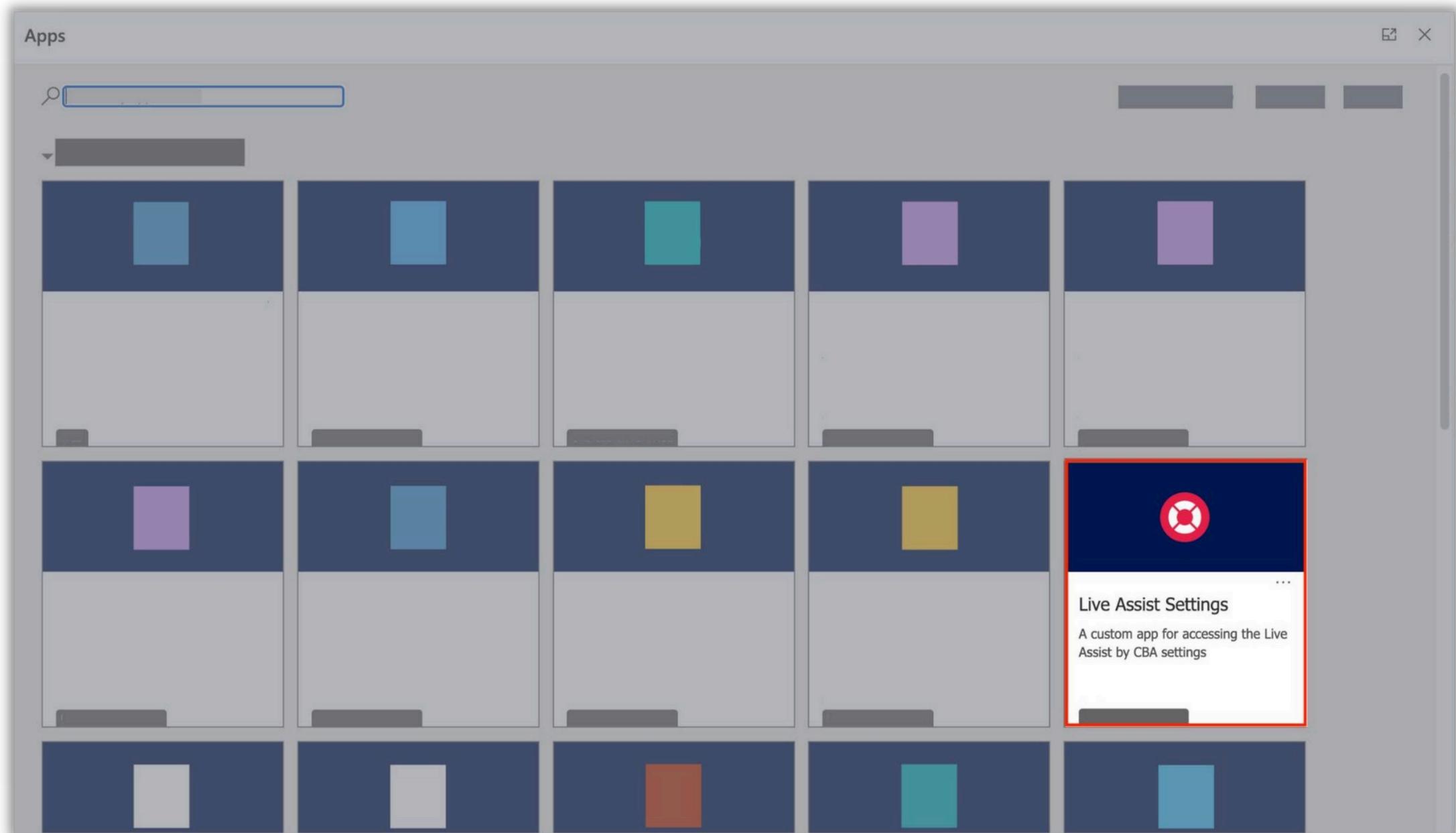
Communication Business Avenue, Inc.





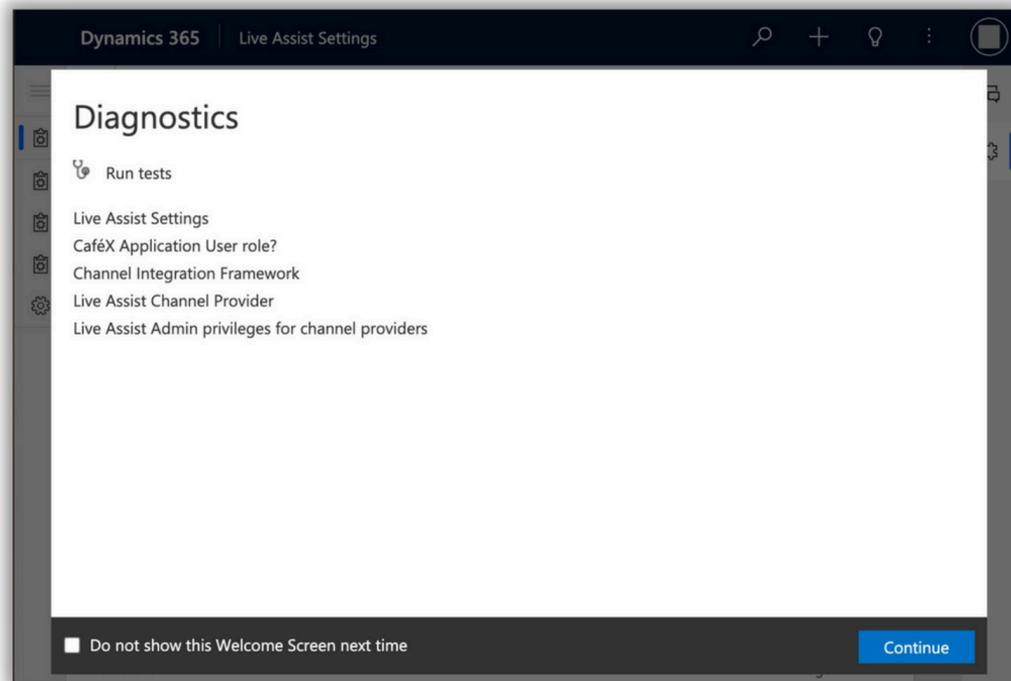
You can now verify your installation using our Diagnostic tool.

- In **Dynamics 365**, select the **Live Assist Settings** app from the installed unified interface apps. Or go to *https://<orgURL>.dynamics.com/apps*.

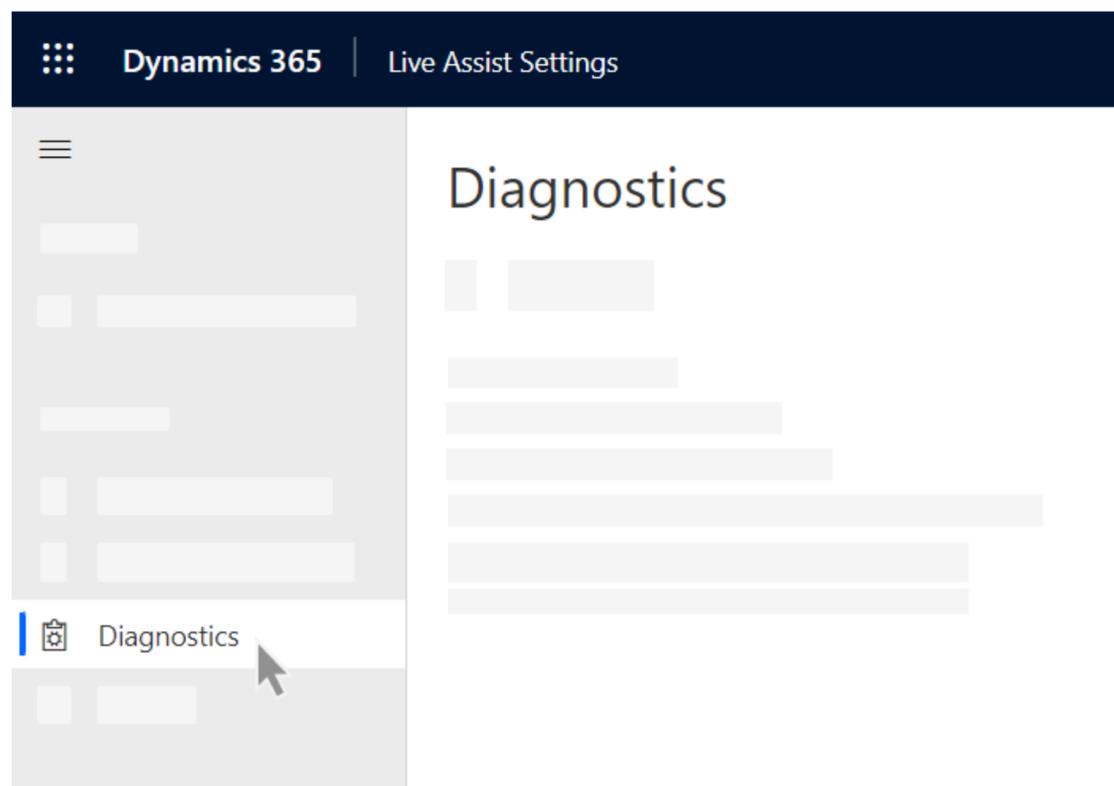




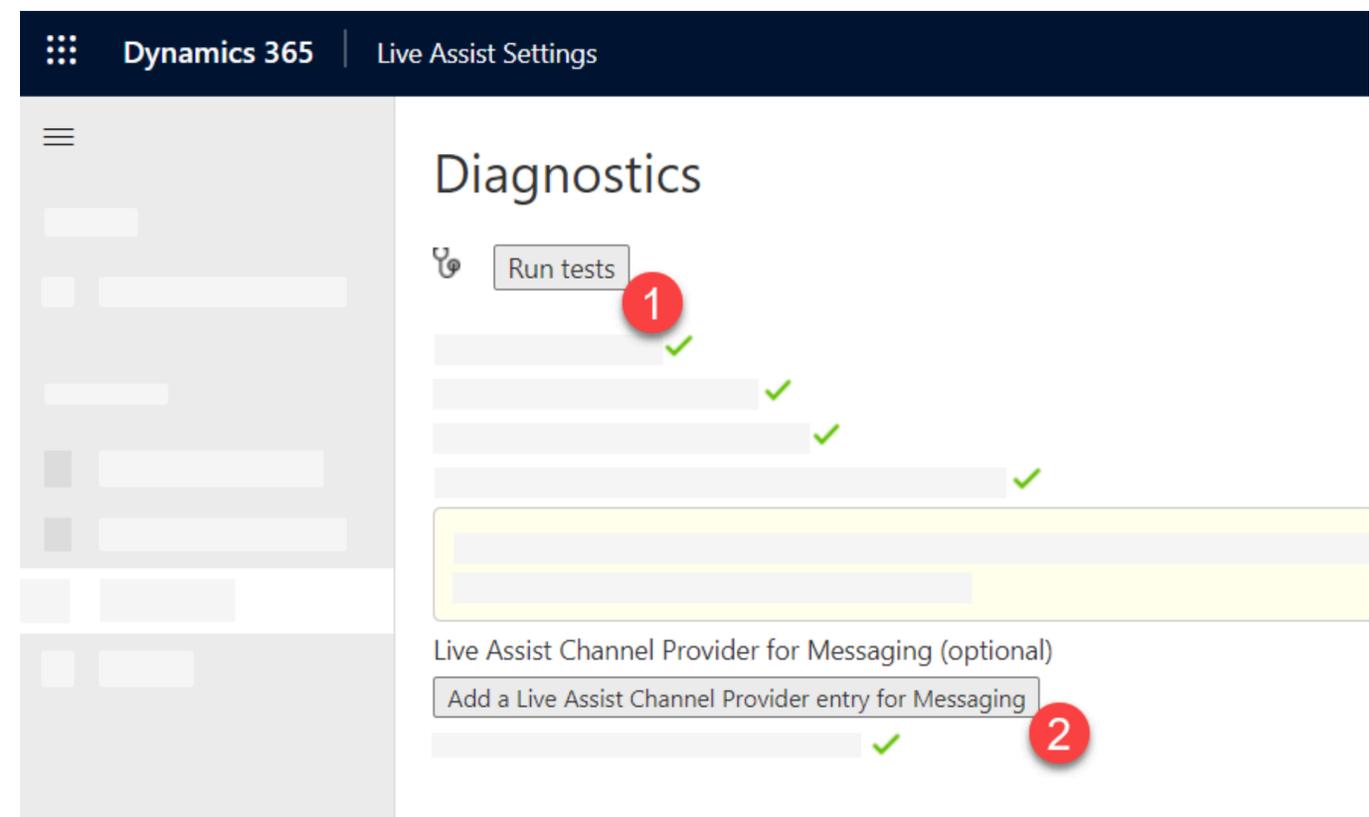
- The **Diagnostics** window will show up.



- Or click on **Diagnostics** from the left menu.



- Please click on **Run tests**.
- Click the **"Add a Live Assist Channel Provider entry for Messaging"** and this will open a new window to set up the Channel Provider.



You will need to configure the Channel Provider to use *Live Assist*. Another way to configure the *Live Assist* Channel Provider manually can be found [here](#).





- Select the individual apps where you want to display the agent widget.
- Set the **Enable Outbound Communication** field to **Yes**.
- **Save** your entries.

The screenshot displays the Dynamics 365 interface for configuring a channel provider. The main configuration area includes fields for Name, Label, Channel URL, Enable Outbound Communication (set to Yes), Channel Order, API Version, Trusted Domain, and Custom Parameters. A list of selected unified interface apps is shown, including Connected Field Service, Customer Service admin center, and Customer Service Hub. The 'Enable Outbound Communication' field is highlighted with a red box and a callout box labeled '2'. The 'Save' and 'Save & Close' buttons in the top toolbar are highlighted with a red box and a callout box labeled '3'. A callout box labeled '1' points to the app selection list.

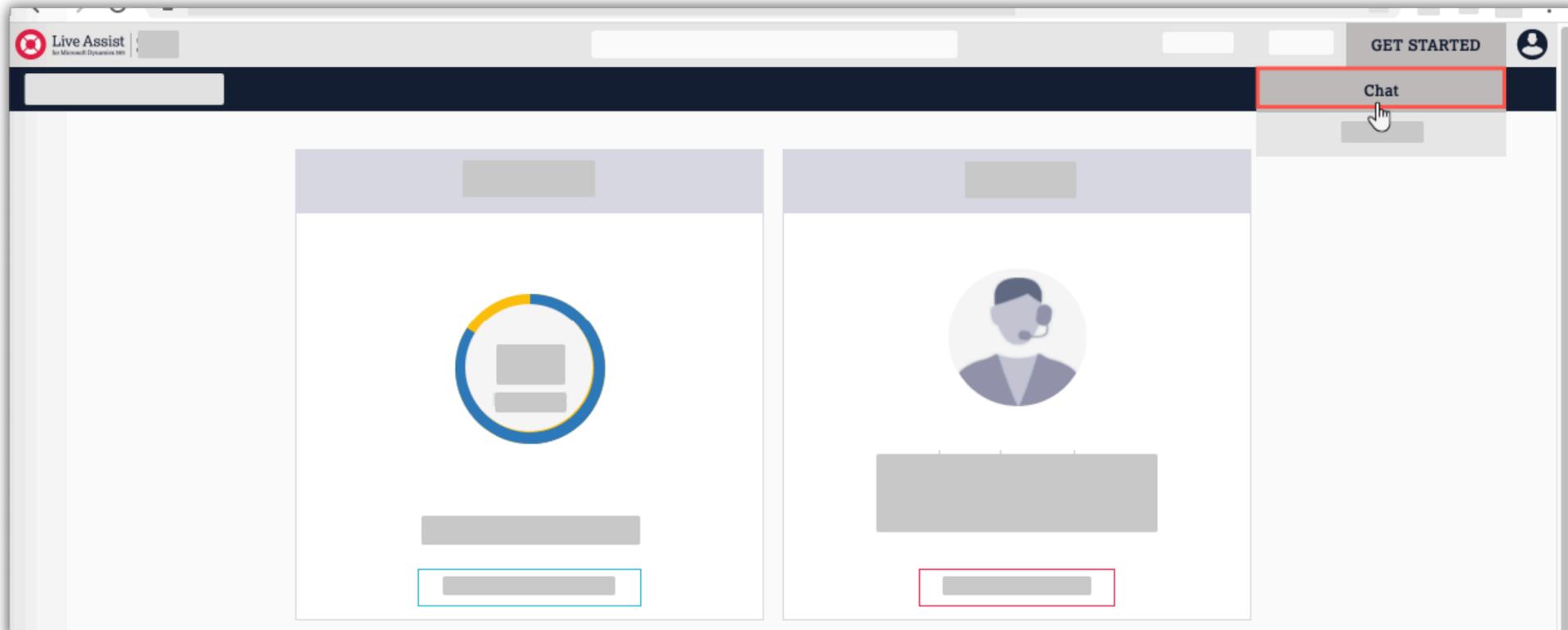
i Project Service app is in an edited state with Dynamics 365 and **Omnichannel for the Customer Service** app does not allow third-party channel integration.



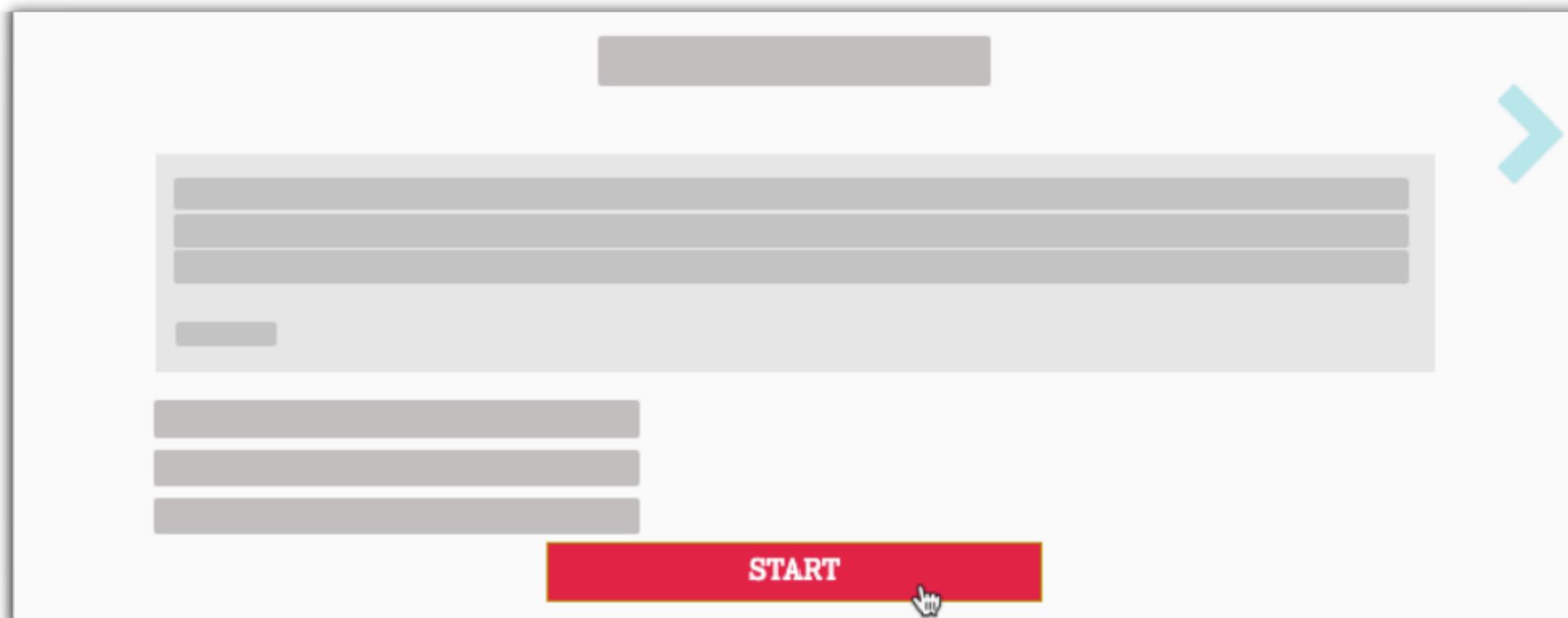


The steps below will guide to start your first messaging engagement.

- 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 interface titled "Add The Code Snippet To Website". The screen features a light gray background with a teal left arrow and a teal right arrow. The main content area contains several horizontal gray bars representing code snippets. A red button labeled "CONTINUE" is positioned at the bottom center, with a mouse cursor hovering over it. Below the code snippets, there is a line of text: "In Step 3 you'll launch the Dynamics CRM Web Client..."

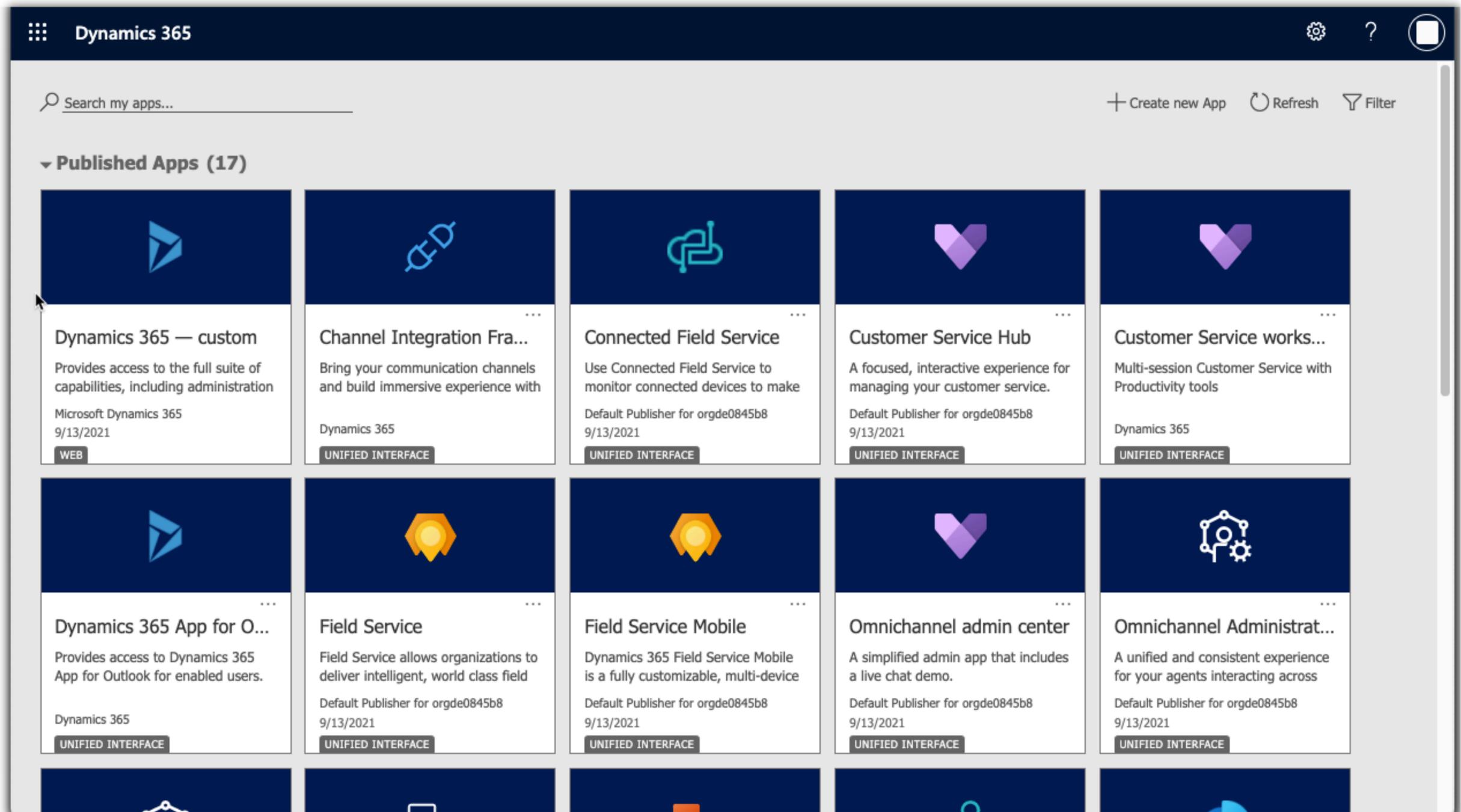
- Click **Launch Dynamics 365**:

A screenshot of a software interface titled "Open Live Assist For Dynamics 365". The screen features a light gray background with a teal left arrow and a teal right arrow. The main content area contains several horizontal gray bars representing code snippets. A yellow button labeled "LAUNCH DYNAMICS 365" is positioned at the bottom center, with a mouse cursor hovering over it.



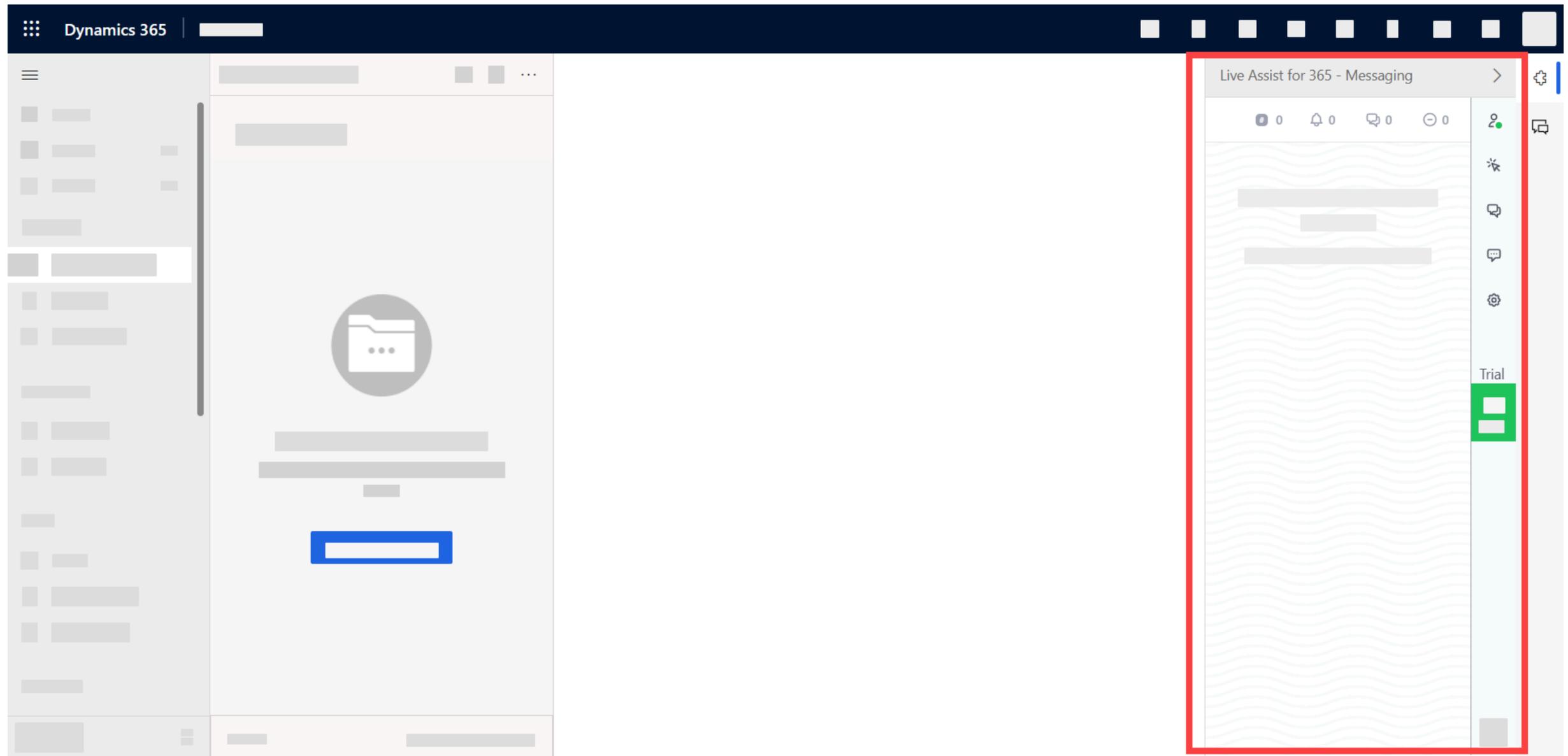


- In a new browser tab, Microsoft Dynamics 365 opens. Alternatively, you can visit <https://<orgURL>.dynamics.com/apps>.





- Choose the specific app where the widget has been added, such as Customer Service Hub, to display the *Live Assist* panel on the right side.



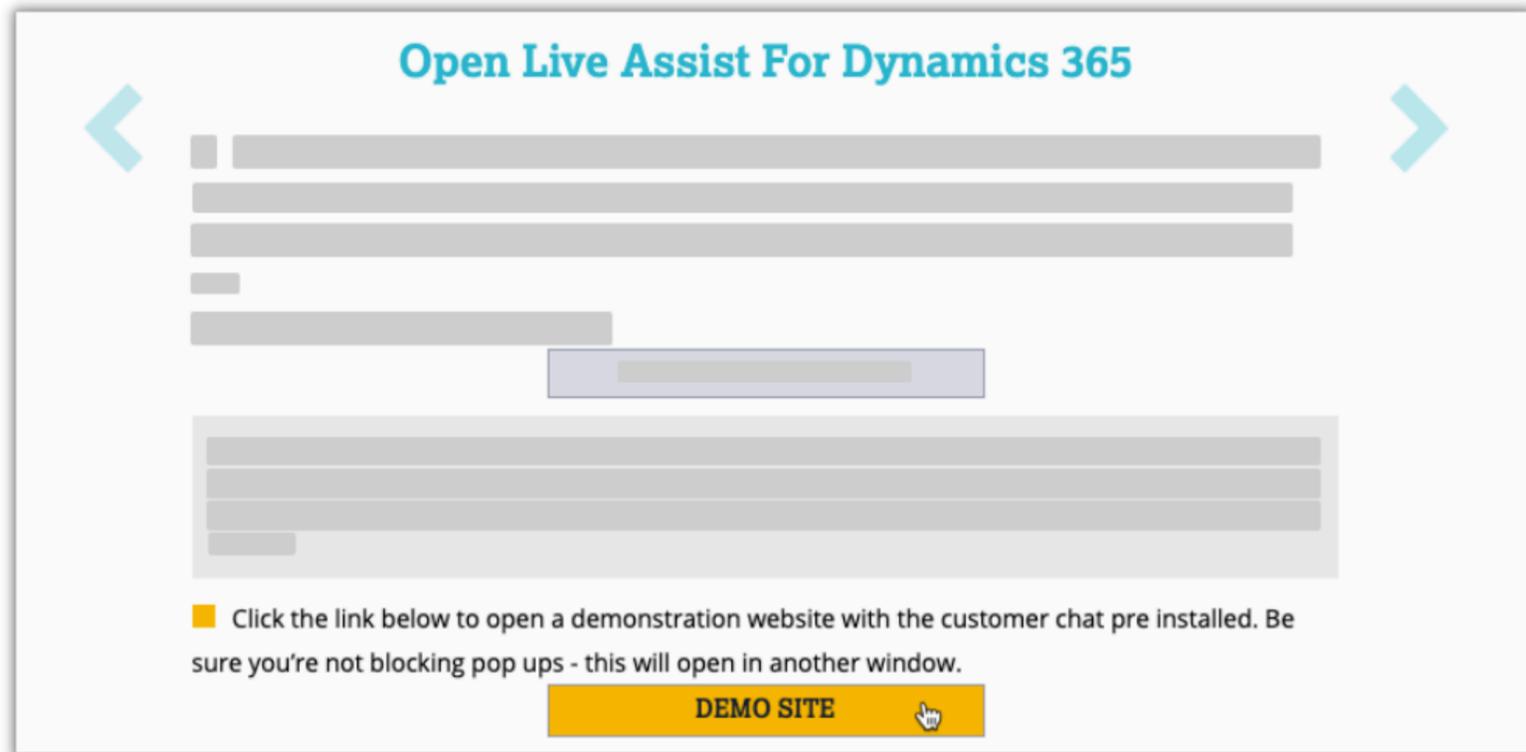
-  If the Agent widget doesn't load and you have a newer Dynamics 365 environment, you may need to follow some additional steps [here](#).





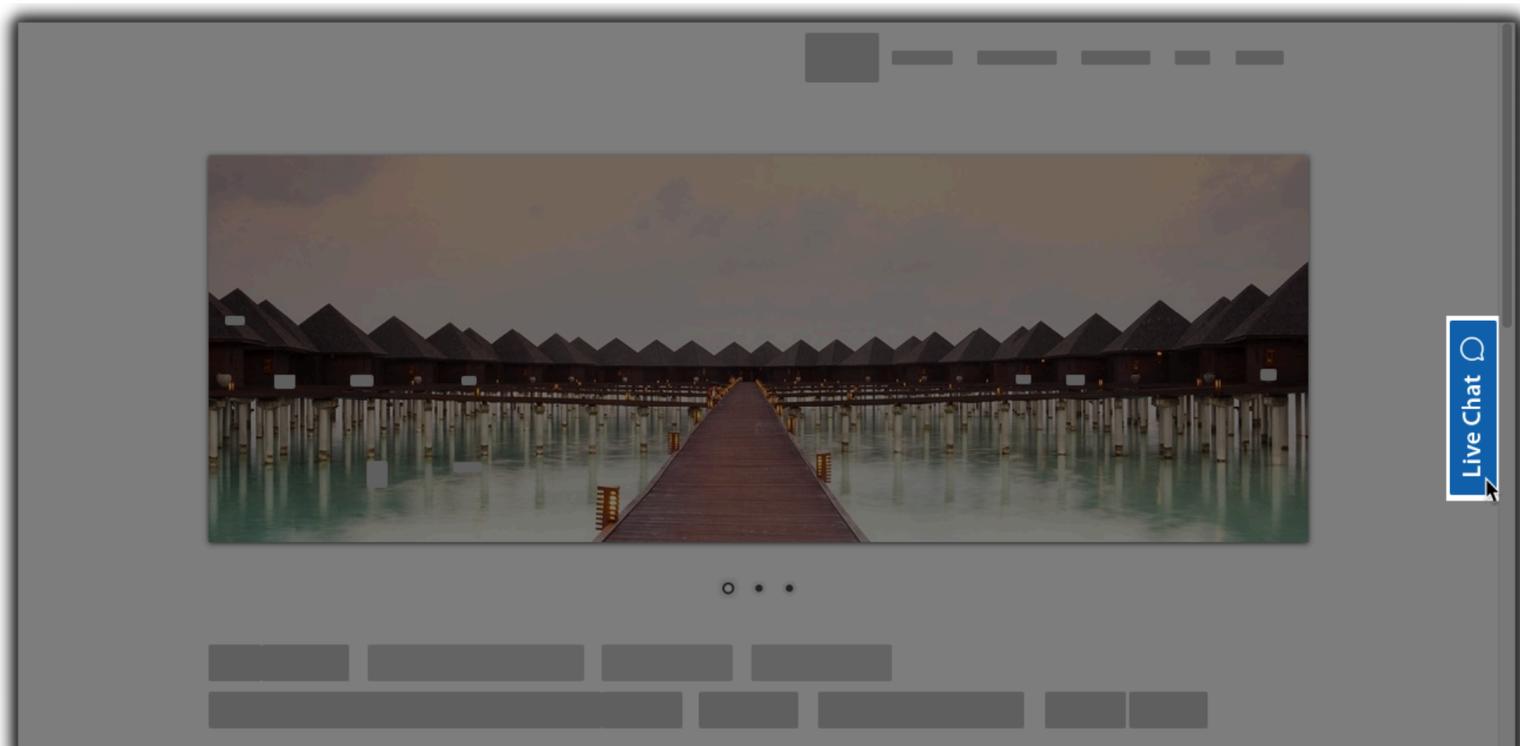
If you don't have access to your site's source code, you can try the Live Assist features in our demo site.

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



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

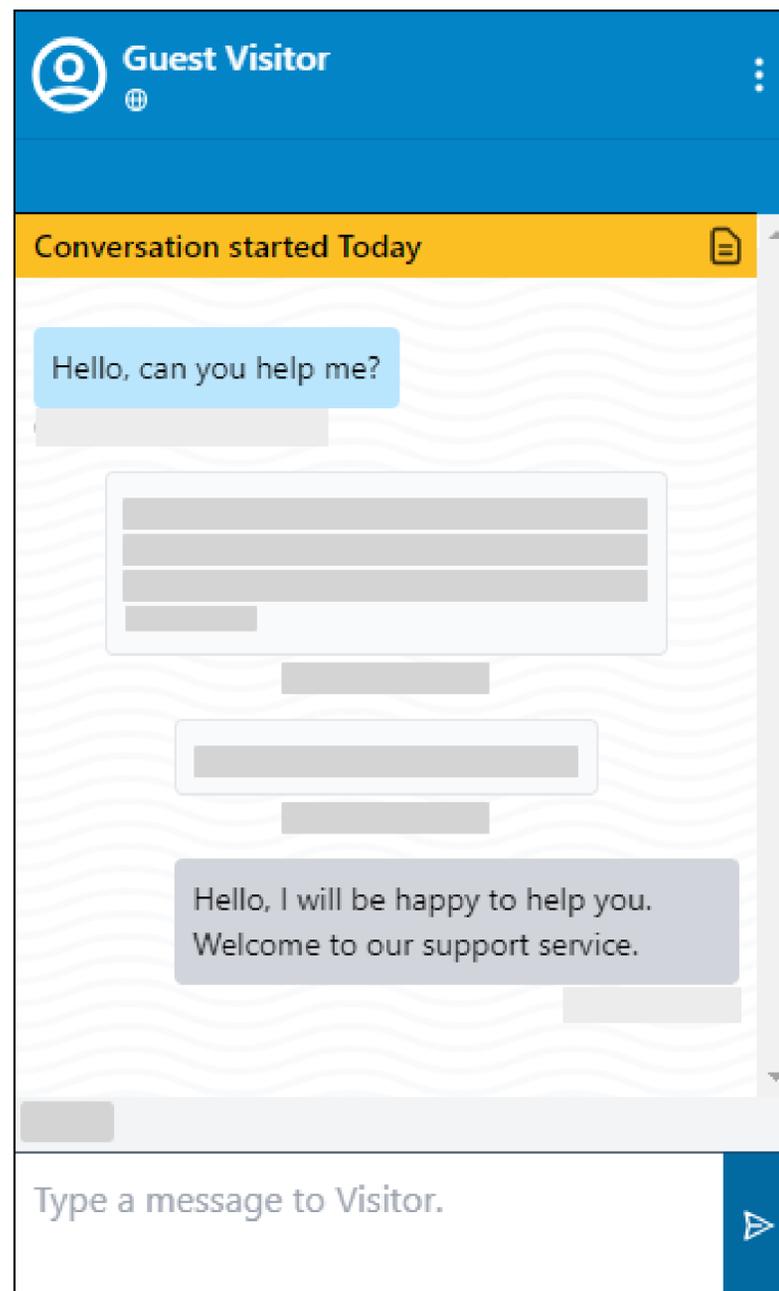
i Your organization's Live Assist tag is automatically embedded into the page for you.



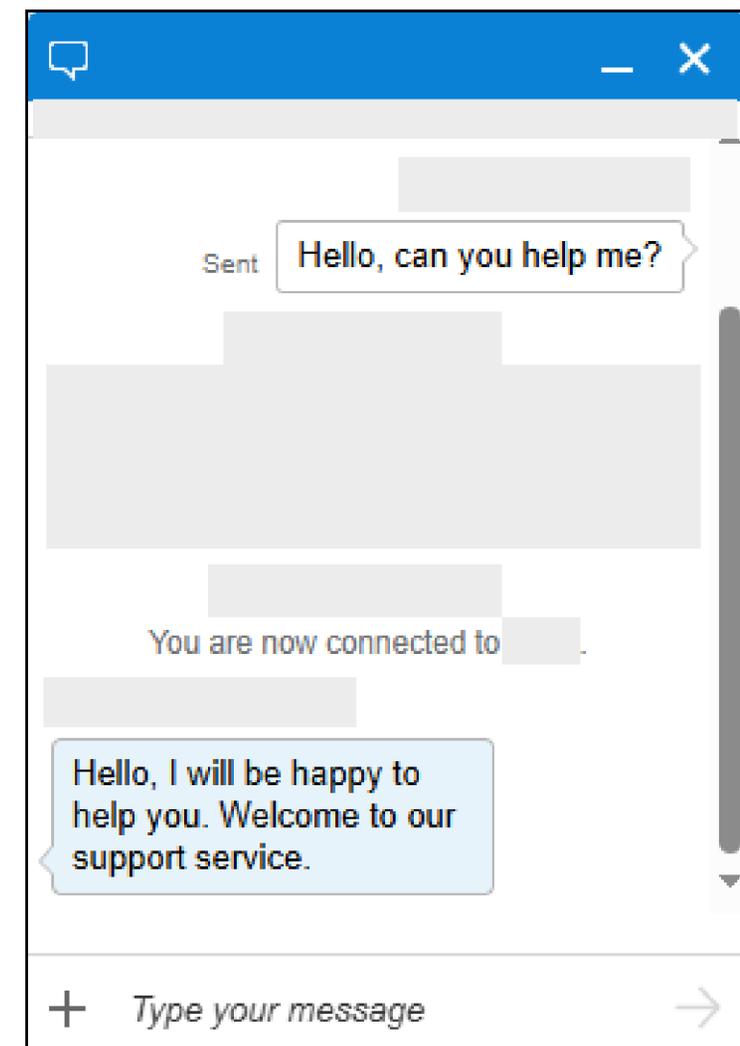


- In the Dynamics 365 and demo Hotel site browser tabs, enter comments and replies in the conversation windows to see how an engagement operates.

Agent view of conversation



Consumer view of conversation



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 for *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.

