

BOMGAR™

**Microsoft Dynamics CRM Integration
with Bomgar Remote Support**

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Bomgar Remote Support Integration with Microsoft Dynamics CRM

IMPORTANT!

You must purchase this integration separately from both your Bomgar software and your Microsoft Dynamics CRM solution. For more information, contact Bomgar sales.

Service desks and customer support organizations using Microsoft Dynamics CRM can integrate with Bomgar to improve service levels, centralize support processes, and strengthen compliance. This document describes the installation and configuration of the Bomgar Remote Support integration with Microsoft Dynamics CRM.

The Microsoft Dynamics CRM integration with Bomgar Remote Support provides the following functionality:

- A Bomgar session key can be generated from within a Microsoft Dynamics CRM case.
- When the Bomgar session ends, session data can be pushed into the case and viewed from within the case.

The integration consists of two main parts:

- Middleware which receives event notifications from the Bomgar Appliance and pushes data into Microsoft Dynamics CRM.
- Two Microsoft Dynamics CRM solutions which provide customization to the Microsoft Dynamics CRM user interface.

Prerequisites for the Bomgar Remote Support Integration with Microsoft Dynamics CRM

To complete this integration, please make sure that you have the necessary software installed and configured as indicated in this guide, accounting for any network considerations.

Applicable Versions

- Bomgar Remote Support: 14.x and newer
- Microsoft Dynamics CRM: 2016

Network Considerations

The following network communication channels must be open for the integration to work properly.

Outbound From	Inbound To	TCP Port #	Purpose
Bomgar Middleware Engine Server	Microsoft Dynamics CRM	443	API calls from the Bomgar Middleware Engine server.
Bomgar Middleware Engine Server	Bomgar Appliance	443	API calls from the Bomgar Middleware Engine server.
Bomgar Appliance	Bomgar Middleware Engine Server	8180 (default) 443 (optional)	The Bomgar Middleware Engine server receives outbound events from the appliance. However, if polling is used instead of outbound events, then this port does not have to be open.

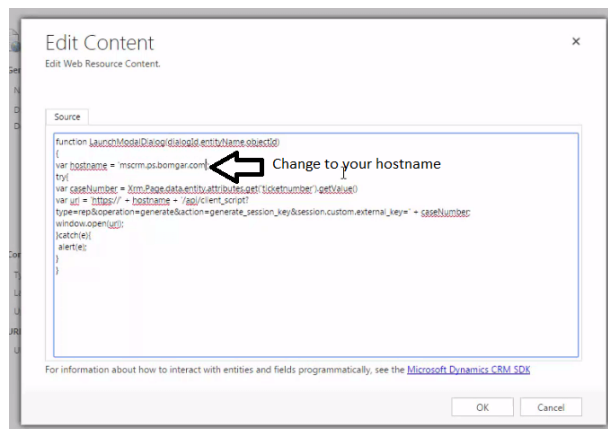
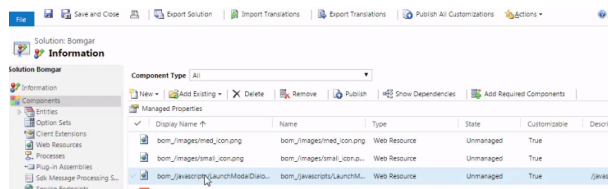
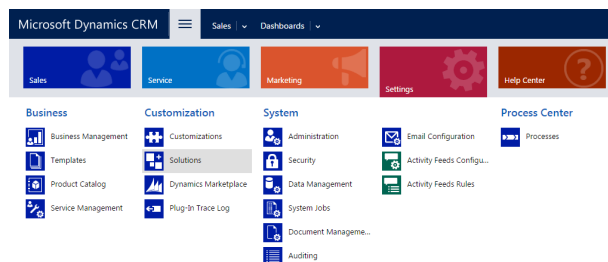
Prerequisite Installation and Configuration

The Microsoft Dynamics CRM integration is a Bomgar Middleware Engine plugin. To install the Bomgar Middleware Engine, follow the instructions in the [Bomgar Middleware Engine Configuration](#) document at www.bomgar.com/docs/remote-support/how-to/integrations/middleware-engine. The Bomgar Middleware Engine Configuration document is also useful to understand how to work with the middleware engine.

Configure Microsoft Dynamics CRM for Integration with Bomgar Remote Support

Configuration within Microsoft Dynamics CRM consists of installing two custom solutions:

1. Log into Microsoft Dynamics CRM as an administrator.
2. Expand the menu next to **Microsoft Dynamics CRM** and click **Settings**.
3. Under **Customization**, click **Solutions**.
4. Click **Import**.
5. From the **Import Solution** popup, click **Choose File** and select the provided **Bomgar_1_1.zip**. Click **Next**.
6. When presented with **Solution Information**, click **Next**.
7. When presented with **Import Options**, leave the **Post Import Action** selected and click **Import**.
8. When the solution is finished importing, click **Publish All Customizations**.
9. Repeat the above steps to import the **BomgarButton_1_0.zip** solution. The only difference is that there is no **Import Options** step.
10. In the list of solutions, open the **Bomgar** solution.
11. Open the resource in the list that starts with **bom_**
/javascripts/LaunchModalDialog.
12. Click the **Text Editor** button. In the editor, find the line that begins with **var hostname =** and change to the appropriate hostname. Click **OK** when done.
13. Click **Save**, and then click **Publish**.



Configure Bomgar Remote Support for Integration with Microsoft Dynamics CRM

Several configuration changes are necessary on the Bomgar Appliance to integrate with Microsoft Dynamics CRM. All of the steps in this section take place in the Bomgar `/login` administrative interface. Access your Bomgar interface by going to the hostname of your Bomgar Appliance followed by `/login` (e.g., <https://support.example.com/login>).

Verify That the API Is Enabled

This integration requires the Bomgar XML API to be enabled. This feature is used by the Bomgar Middleware Engine to communicate with the Bomgar APIs.

Go to `/login > Management > API Configuration` and verify that **Enable XML API** is checked.

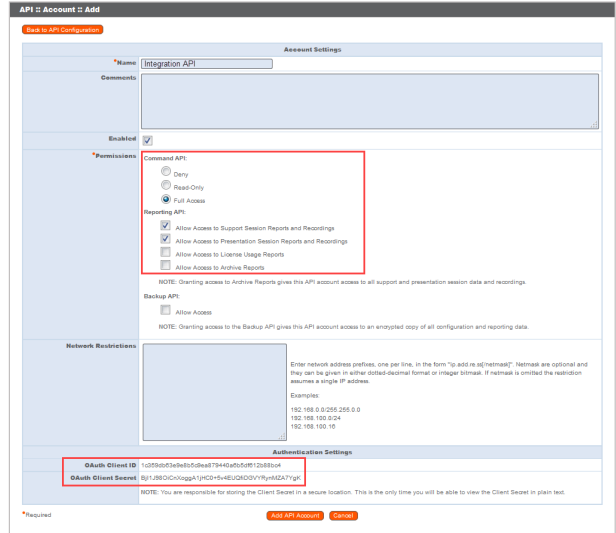
Create an API Service Account - Bomgar 16.1 and Earlier

The API user account is used from within the integration to make Bomgar Command API calls to Bomgar.

1. Go to `/login > Users & Security > Users`.
2. Click **Create New User** and name it **Integration** or something similar.
3. Leave **Must Reset Password at Next Login** unchecked.
4. Set **Password Expires On** to **Never Expires**.
5. Set **Allowed to View Support Session Reports** to **View All Sessions**.
6. Check **Allowed to view support session recordings**.
7. Set **Allowed to View Presentation Session Reports** to **View All Sessions**.
8. Check **Allowed to Use Reporting API** and **Allowed to Use Command API**.
9. Scroll to the bottom and save the account.

Create an API Service Account - Bomgar 16.2 and Later

1. Go to **Management > API Configuration** and create a new API account.
2. Under **Permissions**, check **Full Access** to the **Command API**.
3. For the **Reporting API**, check **Allow Access to Support Session Reports and Recordings** and **Allow Access to Presentation Session Reports and Recordings**.
4. Be sure to copy the values for both the **OAuth Client ID** and **OAuth Client Secret** for use in a later step.



5. Click **Add API Account** to create the account.

Add an Outbound Event URL

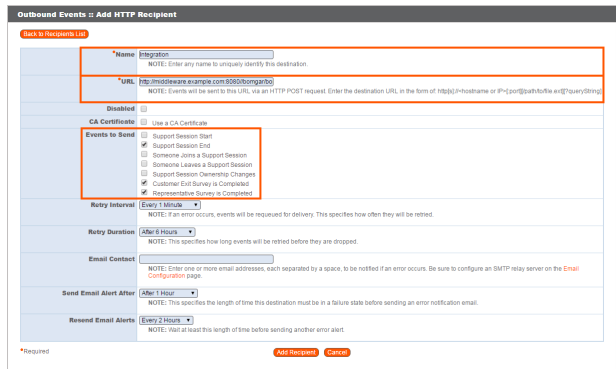
1. Go to **/login > Management > Outbound Events**.
2. Click **Add New HTTP Recipient** and name it **Integration** or something similar.
3. Enter the URL to use:

- If using an appliance ID of "default":
<http://<middleware-host>:<port>/ERSPost>. The default port is **8180**.
- If using an appliance ID other than "default":
<http://<middleware-host>:<port>/ERSPost?appliance=<appliance-id>> where **<middleware-host>** is the hostname where the Bomgar Middleware Engine is installed. The default port is **8180**. The **<appliance-id>** is an arbitrary name, but note the value used, as it is entered later in the plugin configuration. This name accepts only alphanumeric values, periods, and underscores.

4. Scroll to **Events to Send** and check the following events:

- **Support Session End**
- **Customer Exit Survey is Completed**
- **Representative Survey is Completed**
- **Someone Joins a Support Session** (Optional)

5. Scroll to the bottom and click **Add Recipient**.



- Now, the list of outbound events should contain the event just added. The **Status** column displays a value of **OK** if communication is working. If communication is not working, the **Status** column displays an error which you can use to repair communication.

Outbound Events - HTTP Recipients						
Add New HTTP Recipient						
Configure up to 10 external HTTP servers that will be notified when certain session events occur. These servers must respond to each event with HTTP 200 in order to be considered successful.						
Name	Disabled	URL	Events to Send	Status	Actions	
Session Counter	Yes	http://dnb.example.com/session	Support Session Start	OK	Edit	Delete
Survey Page	Yes	http://dnb.example.com/survey	Customer Exit Survey is Completed Representative Survey is Completed	OK	Edit	Delete

Configure the Microsoft Dynamics CRM Plugin for Integration with Bomgar Remote Support

Now that you have configured Microsoft Dynamics CRM and the Bomgar Appliance, deploy and configure the Microsoft Dynamics CRM plugin. For additional information about working with the Bomgar Middleware Engine, please see the [Bomgar Middleware Engine Configuration](http://www.bomgar.com/docs/remote-support/how-to/integrations/middleware-engine) document at www.bomgar.com/docs/remote-support/how-to/integrations/middleware-engine.

1. Copy the provided plugin zip file to the server hosting the Bomgar Middleware Engine.
2. Extract the plugin zip file to the **Plugins** folder in the directory where the Bomgar Middleware Engine is installed.
3. Restart the Bomgar Middleware Engine Windows service.
4. From the server, launch the middleware administration tool. The default URL is **http://127.0.0.1:53231**.
5. The **Microsoft Dynamics CRM Plugin** shows in the list of plugins. Click the clipboard icon to add a new configuration.

Bomgar Appliance

The first portion of the plugin configuration provides the necessary settings for communication between the plugin and the Bomgar Appliance. The configuration sections include:

1. **Plugin Configuration Name:** Any desired value. Because multiple configurations can be created for a single plugin, allowing different environments to be targeted, provide a descriptive name to indicate how this plugin is to be used.
2. **Appliance Id:** This can be left as **Default** or can be given a custom name. This value must match the value configured on the outbound event URL in the Bomgar Appliance. If outbound events are not being used, this value is still required, but any value may be used.
3. **Bomgar Appliance Host Name:** The hostname of the Bomgar Appliance. Do not include `https://` or other URL elements.
4. **Bomgar Integration API OAuth Client ID:** When using API accounts in Bomgar Remote Support 16.2.1 or newer, this field should contain the Client ID of the OAuth account.
5. **Bomgar Integration API OAuth Client Secret:** When using API Accounts available in Bomgar Remote Support 16.2.1 or newer, this field should contain the client Secret of the OAuth account.
6. **Bomgar Integration API User Name:** If using a Bomgar Remote Support version prior 16.2.1, this field should contain the username of the API service account created on the Bomgar Appliance.
7. **Bomgar Integration API Password:** If using a Bomgar Remote Support version prior 16.2.1, this field should contain the password of the above user.
8. **Locale Used for Bomgar API Calls:** This value directs the Bomgar Appliance to return session data in the specified language.
9. **Disabled:** Enable or disable this plugin configuration.
10. **Allow Invalid Certificates:** Leave unchecked unless there is a specific need to allow. If enabled, invalid SSL certificates are allowed in calls performed by the plugin. This would allow, for example, self-signed certificates. This is not recommended in production environments.

The screenshot shows a configuration form with the following sections and fields:

- Plugin Configuration Name:** A dropdown menu with "QA Environment" selected.
- Appliance Id:** A dropdown menu with "default" selected.
- Bomgar Appliance Host Name:** A text input field with "support.example.com" entered.
- Bomgar Integration API OAuth Client ID:** A text input field with a long alphanumeric string.
- Bomgar Integration API OAuth Client Secret:** A text input field with a long alphanumeric string.
- Bomgar Integration API User Name:** A text input field.
- Bomgar Integration API Password:** A text input field.
- Locale Used for Bomgar API Calls:** A dropdown menu with "English" selected.
- Disabled:** A checkbox labeled "Disabled" which is checked.
- Allow Invalid Certificates:** A checkbox which is unchecked.
- Outbound Event Types:** A list of checkboxes: "Support Session End" (checked), "Customer Exit Survey is Completed" (checked), "Representative Survey is Completed" (checked), and "Someone Joins a Support Session" (unchecked).
- Polling Event Types:** A list of checkboxes: "Support Session End" (checked).
- Polling Interval (in minutes):** A text input field.

11. **Use Non-TLS Connections:** Leave unchecked unless it is the specific goal to use non-secure connections to the Bomgar Appliance. If checked, TLS communication is disabled altogether. If non-TLS connections are allowed, HTTP access must be enabled on the Bomgar **/login > Management > API Configuration** page. Using non-secure connections is discouraged.

Note: When using OAuth authentication, TLS cannot be disabled.

12. **Outbound Events Types:** Specify which events the plugin processes when received by the middleware engine. Keep in mind that any event types selected here must also be configured to be sent in Bomgar. The middleware engine receives any events configured to be sent in Bomgar but passes them off to the plugin only if the corresponding event type is selected in this section.
 - a. **Support Session End**
 - b. **Customer Exit Survey is Completed**
 - c. **Representative Survey is Completed**
13. **Polling Event Types:** If network constraints limit connectivity between the Bomgar Appliance and the middleware engine such that outbound events cannot be used, an alternative is to use polling. The middleware engine regularly polls the Bomgar Appliance for any sessions that have ended since the last session was processed. At this time, only the **Support Session End** event type is supported.

Note: One caveat to polling behavior versus the use of outbound events is that if a session has ended but the customer exit survey has not yet been submitted within the same polling interval, the customer exit survey is not processed. This does not apply to representative surveys since the session is not considered to be complete if a representative survey is still pending.

14. **Polling Interval:** Enter only if polling is used. This determines how often the middleware engine polls the Bomgar Appliance for sessions that have ended.
15. **Retry Attempt Limit:** Enter the number of retries that can be attempted if the plugin fails to process an event.
16. **Retry Outbound Event Types:** Specify which outbound events the plugin retries if it fails to process the event.
17. **Retry Polling Event Types:** Specify which polling events the plugin retries if it fails to process the event.

Microsoft Dynamics CRM Instance

The remainder of the plugin configuration provides the necessary settings for communication between the plugin and the Microsoft Dynamics CRM instance. The configuration settings include:

1. **Microsoft Dynamics CRM URL:** URL of the Microsoft Dynamics CRM instance.
2. **Microsoft Dynamics CRM Domain:** Domain of the Microsoft Dynamics CRM instance.
3. **Microsoft Dynamics CRM User Name:** Username used to connect to Microsoft Dynamics CRM.
4. **Microsoft Dynamics CRM Password:** Password of the above user.
5. **Update Microsoft Dynamics CRM with all Bomgar sessions:** If enabled, all Bomgar sessions are imported into Microsoft Dynamics CRM.
6. **List of Allowed Microsoft Dynamics CRM Prefixes:** If desired, enter a comma-separated list of allowed Microsoft Dynamics CRM prefixes (e.g., ABC, CBA). Only Bomgar sessions related to these prefixes are imported.

Note: If Update CRM with all Bomgar sessions is checked, the value in this field is ignored.

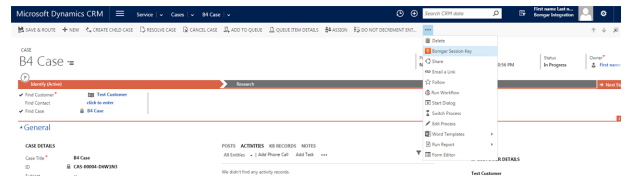
7. **Import Timestamp as UTC:** If enabled, any datetime values are imported as UTC times. If not enabled, datetime values are imported using the local time zone.

After saving the configuration, click the test icon next to the new plugin configuration. No restart is needed.

Use Cases for the Microsoft Dynamics CRM Integration with Bomgar Remote Support

Generate Session Key

Support staff can generate a session key that can be given to the end user over the phone or via email to initiate a support session that is automatically associated with the selected case.



Import Bomgar Session Data into Ticket

Once the session ends, the case is automatically updated with information gathered during the session including:

- **General Information**
- **Chat Transcript** (including files transferred, special actions, and other events)
- **Session Events**
- **System Information** (General section)
- **Session Notes**
- **Surveys** (customer and representative)

