

How to Integrate MS Dynamics With ProProfs Live Chat

ProProfs Live Chat Integration with MS Dynamics 365 helps in reaching out to website visitors proactively to drive more sales. Use Microsoft Dynamics 365 CRM to assemble leads and cases, expand email marketing lists, and monitor sales!

Once the integration is done, basic information such as the name and email, are automatically sent to their respective standard fields in the MS Dynamics CRM. For custom field mapping, you may contact our customer care.

Field mapping is required to send the data (values collected from multiple channels like pre-chat form, custom variables, chat transcripts, etc.) to their corresponding fields in the MS Dynamics CRM.

These values help in generating the three main components of this integration:

1. **Case** (used to track a customer request, question, or issue),
2. **Contact** (a customer, supplier, or colleague), and
3. **Lead** (a prospective customer for your product/service).

There are three types of integrations between MS Dynamics and ProProfs Live Chat:

1. [MS Dynamics CRM On-Premise integration with ProProfs Live Chat](#)
2. [MS Dynamics CRM Online \(MS Dynamics 365\) integration with ProProfs Live Chat](#)
3. [Manual lead generation with both the On-Premise/Online CRM integration with ProProfs Live Chat](#)

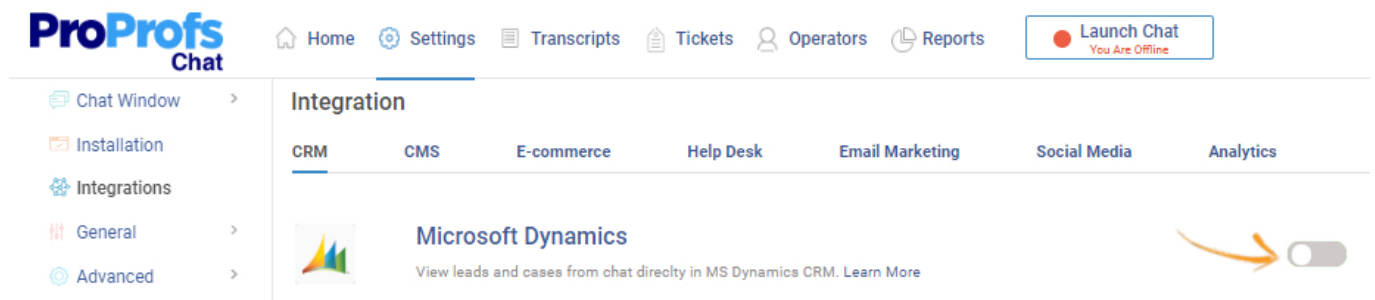
Here's how to integrate MS Dynamics CRM On-Premise with ProProfs Live Chat:

Requirements For MS Dynamics On-premise integration:

1. The server must be HTTPS enabled.
2. To install MS Dynamics choose a domain (e.g., <https://proprofs.api.crm.dynamics.com>)
3. For integration use the MS Dynamics admin account.
4. To store contacts in the CRM, you need to add the Name and Email field in the [pre-chat form](#).
5. On-Premise subscription with an internet-facing deployment.

Step 1: From your ProProfs Live Chat dashboard, go to **Settings >> Integrations >> CRM** and

enable Microsoft Dynamics.



Step 2: Enter the details as required below:

- **Dynamics CRM URL:** Enter your MS Dynamics URL (Example: <https://yoururl.dynamics.com>).
- **User ID/Email:** Username or email ID of the MS Dynamics account to perform the integration.
- **Password:** Password of the MS Dynamics account to establish the connection.
- Enable **On-Premise** to confirm that this is MS Dynamics CRM On-Premise.
- Enable **Create Contacts, Create Leads, Create Cases**.
- Enable **Automatic Create** if you want Leads to be created automatically. Once done, save.

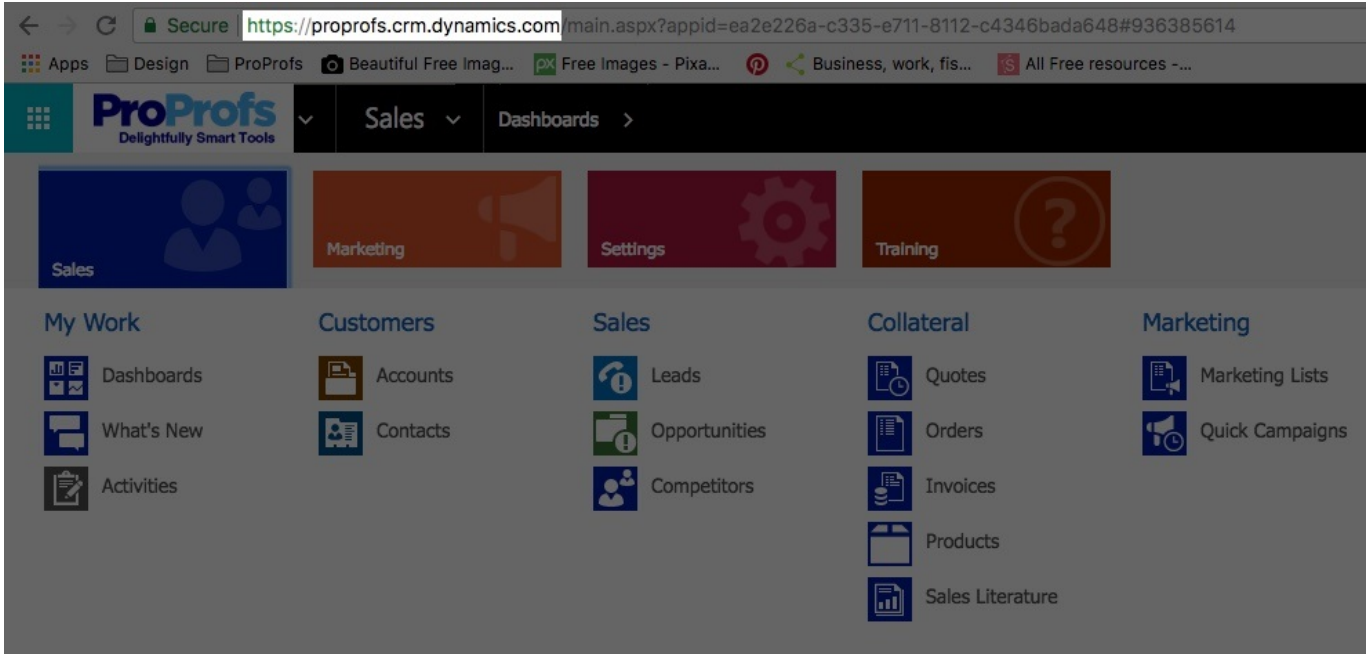
The screenshot shows a configuration form for Microsoft Dynamics. The form has a title 'Microsoft Dynamics' and a close button in the top right corner. It contains the following fields and options:

- Dynamics CRM URL:** A text input field with a placeholder 'Ex- https://live2support.crm5.dynamics.com/'.
- User ID/Email:** A text input field.
- Password:** A text input field.
- On Premise:** A radio button group with 'Yes' and 'No' options.
- Create Contacts:** A radio button group with 'Yes' and 'No' options.
- Create Leads:** A radio button group with 'Yes' and 'No' options.
- Create Cases:** A radio button group with 'Yes' and 'No' options.
- Automatic Create:** A radio button group with 'Yes' and 'No' options.
- Save:** A blue button at the bottom left.

The integration with MS Dynamics CRM On-Premise is now complete. When you log in to your MS Dynamics account, the user data (name, email, phone number, chat transcripts, etc.) will get

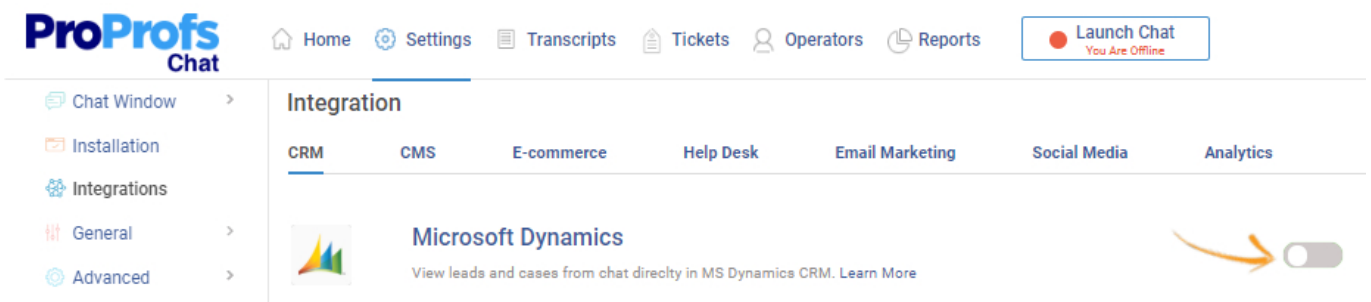
added to MS Dynamics as Contacts, Cases, and Leads.

To integrate **MS Dynamics Online** with ProProfs Live Chat, you'll first require the organization's service URL. To get that, log in to your MS Dynamics portal and **copy the highlighted part of the URL**, as shown in the screenshot below. Once done, **follow the above steps 1 and 2** to finish the integration process.



Here's how to enable manual lead and case during the integration process of MS Dynamics CRM and ProProfs Live Chat:

Step 1: From your ProProfs Live Chat dashboard, go to **Settings >> Integrations >> CRM** and enable **Microsoft Dynamics**.



Step 2: Disable the **Automatic Create** option and **save**.

Microsoft Dynamics

Dynamics CRM URL * ⓘ Ex- https://live2support.crm5.dynamics.com/

User ID/Email * ⓘ

Password * ⓘ

On Premise ⓘ Yes No

Create Contacts ⓘ Yes No

Create Leads ⓘ Yes No

Create Cases ⓘ Yes No

Automatic Create ⓘ Yes No

Save

Now, when you're chatting with a website visitor or a potential customer, you can click **Create Lead** to manually create a lead or **Create Case** to manually create a case.

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ProProfs Chat Home Settings Transcripts Tickets Operators Reports Chat You Are Online

Visitors (1) ● Den

Welcome

Denre

Block this visitor

Transcript Transfer Chat End Chat

Create Lead

Canned Activity

Search...

General

No Canned Response

Type your message... Send

+ Add Tag

Enter the details such as the **Title, Name, Email, Type**, and click **Create**.



Once this is done, the user data (name, email, phone number, chat transcripts, etc.) will get

added to MS Dynamics as Contacts, Cases, and Leads.

Related Articles:

- [How to Integrate Infusionsoft with ProProfs Live Chat](#)
- [How to Integrate Sugar CRM with ProProfs Live Chat](#)
- [How to Integrate Zoho CRM with ProProfs Live Chat](#)