

Pre-populating Fields using Velaro CRM Integration

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To pre-populate fields you will need to know the key data fields to map.

Velaro key data fields can be any fields you pass into the chat, standard fields available are:

<originalquerystring>

<surveyid>

<visitoremail>

<chatid>

<visitorname>

<chatuser>

<siteid>

<polldepts>

<vsiteid>

And your Prechat Survey Fields:

(For example)

<Name>

<Email>

<Company>

Copy whichever key data field you want to pre-populate inside of your CRM window in Velaro by navigating to:

Account > Integration > Select your CRM provider.

Select the Field Mapping tab.

Create a new field or edit the existing field for which you want to pre-populate.

Find the Chat attribute field. Type in your Key Data field information inside the Chat attribute field minus the <> signs.

Hit save.

Now the fields for which you have entered chat attribute information will pre-populate in the CRM window when a chat begins.

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<http://kb.velaro.com/KnowledgebaseArticle10158.aspx>

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