

A detailed illustration of a hand-drawn business plan on a grey background. It includes various charts like bar graphs and pie charts, a lightbulb, a car, and text elements such as "idea 45% is SALE!", "25% time", "TEAM", and "WWW". The illustration is overlaid on an open book at the bottom.

# Installation Guide

## Dialog Insight Extension for Magento

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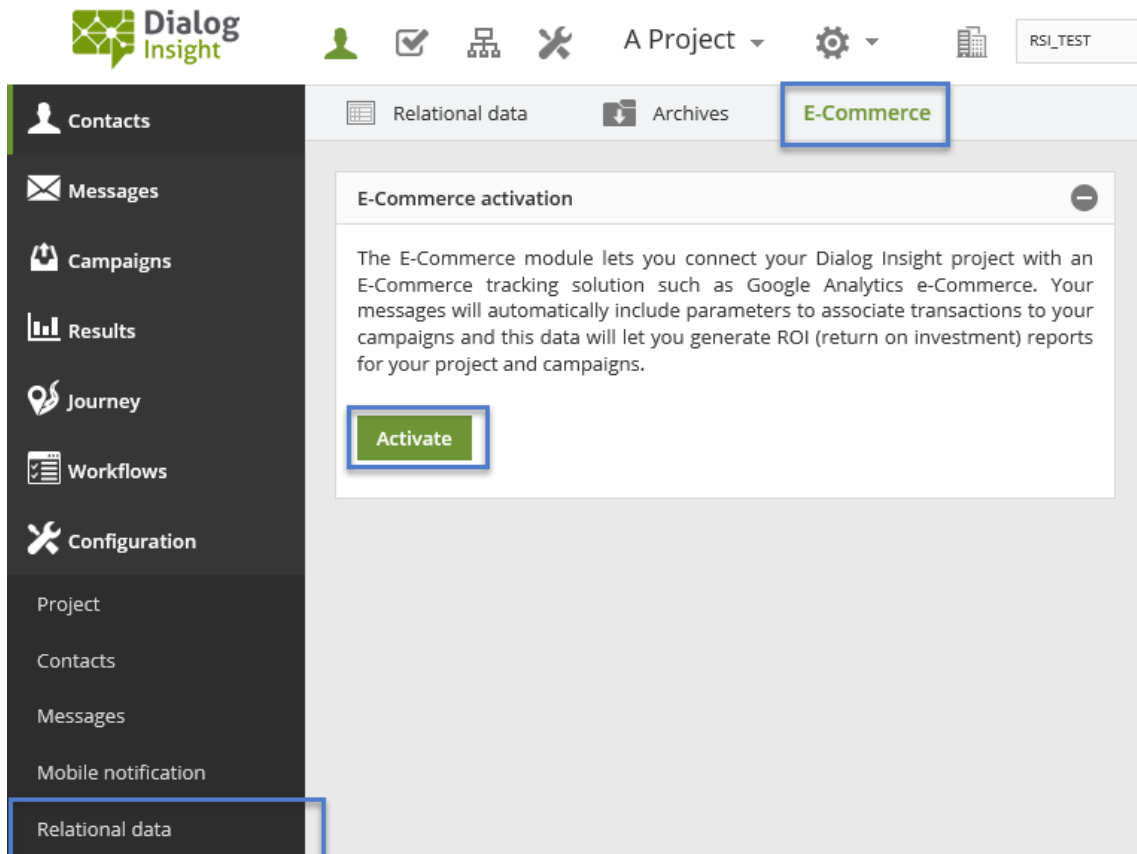
[www.dialoginsight.com](http://www.dialoginsight.com)

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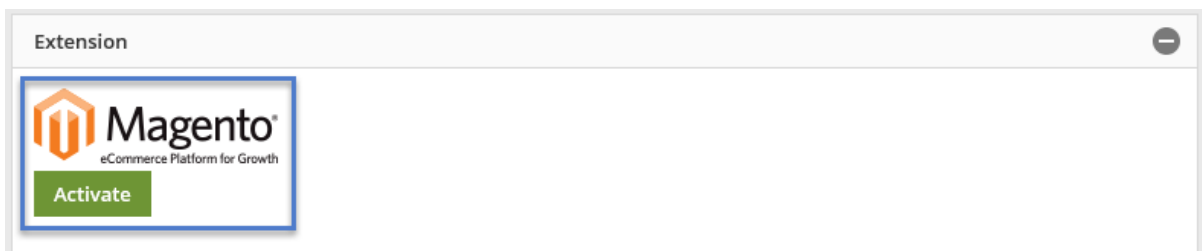
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## Configuration in Dialog Insight Platform

1. Have a [project configured](#) in your account to manage your contact list  
Create all the fields that you need to sync (FirstName, LastName, Email, etc.)
2. Activate the extension from the “**Configuration**” section, under “**Relationnal data**”  
*The E-Commerce module must have been activated in your account. Contact you account manager if you don't have it.*




- a. If not already done, activate **E-Commerce** in your project  
*This will create all the database tables to store your transactions data.*
- b. Activate the extension under “**Extension**” box



- c. Click **“Activate”** in the popup and take note of the **API key, Id Key, Id Project** and choose how to save customer data in **Dialog Insight**

Magento 2 plugin ✕



Copy and paste the following information into the Magento extension configuration:

**Id Key**      9837  
**API Key**     Y2gnQzPSzBnSjCXi8d9AmoyPlq890gU4  
**Id Project**   1106

Choose how to save your contact data from Magento. Transaction data will always be synchronized.

Complete empty fields and update existing data  
 Complete only empty fields without updating existing data  
 Do not complete empty fields and do not change contact data (not recommended)

Save Cancel

## Configuration in your Magento Store

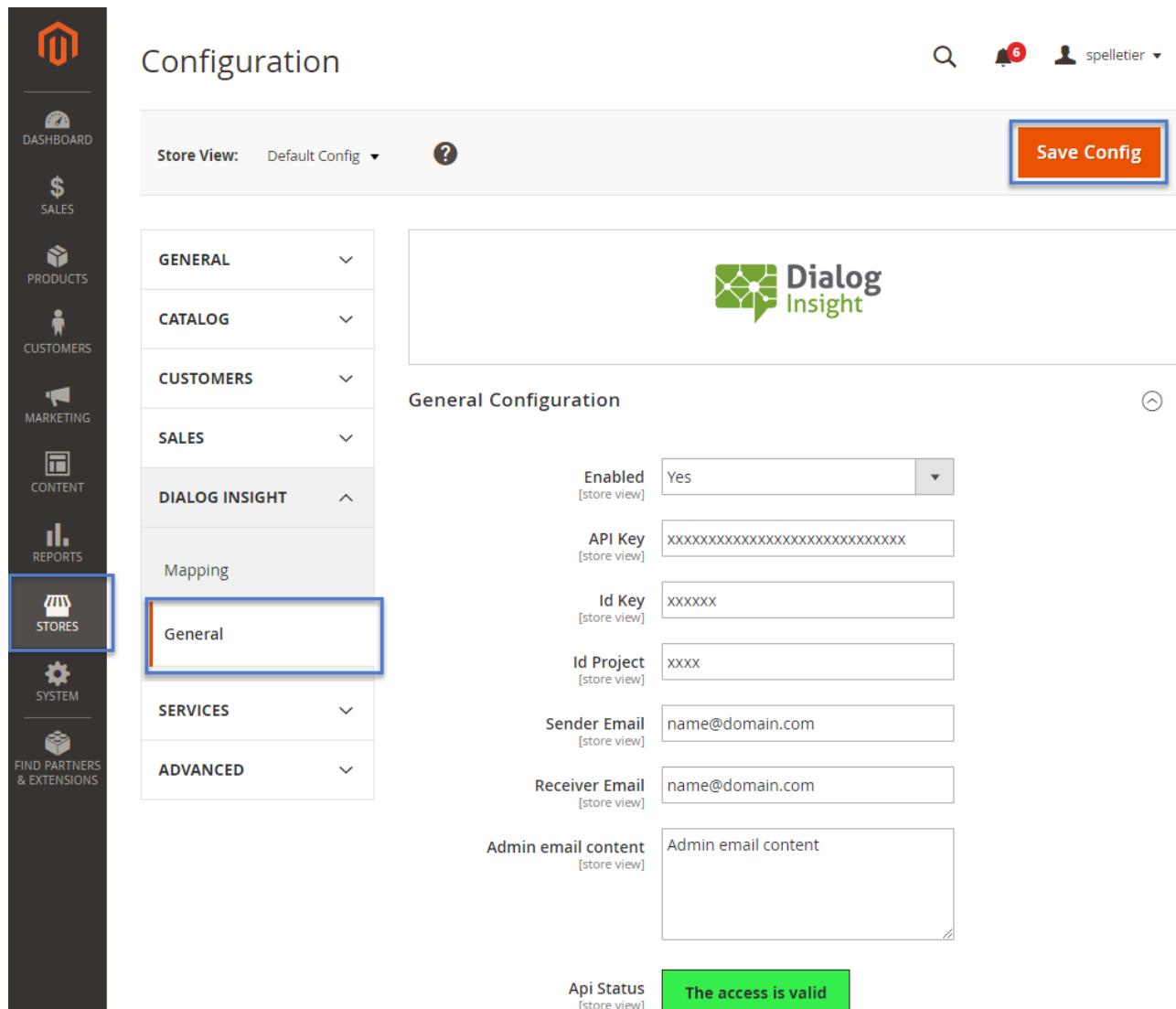
1. Download and install the **Dialog Insight** extension from [Magento Marketplace](#).

Extension : <https://marketplace.magento.com/dialoginsight-di.html>

Download : [http://docs.magento.com/marketplace/user\\_guide/quick-tour/downloads.html](http://docs.magento.com/marketplace/user_guide/quick-tour/downloads.html)

Install : [http://docs.magento.com/marketplace/user\\_guide/quick-tour/install-extension.html](http://docs.magento.com/marketplace/user_guide/quick-tour/install-extension.html)

2. In **Magento admin**, go to **Stores -> Configuration** and click on **“General”** under **“Dialog Insight”** tab



The screenshot shows the Magento admin interface. On the left, a vertical sidebar contains various navigation icons, with the 'STORES' icon highlighted in blue. The main content area is titled 'Configuration' and features a search bar, a user profile 'spelletier', and a 'Save Config' button. Below this, there's a 'Store View' dropdown set to 'Default Config'. A list of configuration tabs is on the left, with 'DIALOG INSIGHT' expanded to show 'General', 'Mapping', 'SERVICES', and 'ADVANCED'. The 'General Configuration' section contains several form fields: 'Enabled' (set to 'Yes'), 'API Key' (a long string of Xs), 'Id Key' (XXXXXX), 'Id Project' (XXXX), 'Sender Email' (name@domain.com), 'Receiver Email' (name@domain.com), and 'Admin email content' (a text area with 'Admin email content'). At the bottom, the 'Api Status' field shows a green box with the text 'The access is valid'.

- a. (Mandatory) Select **“Yes”** in **“Enabled”** field and enter the **API key**, **Id Key** and **Id Project** from the Dialog Insight’s platform (Step 2c of the previous section)  
*After saving the config, If all those informations are good, the Api Status at the bottom will turn green. Otherwise, revalidate the **API key**, **Id Key** and **Id Project**.*

- b. (Optional) Enter the **Sender email, Receiver Email** and **Admin email content**.  
*This will send a message to the specified Receiver Email when the plugin is in error for a period of 6 hours.*

3. Click on “**Mapping**” under “**Dialog Insight**” tab

Store View: Default Config ? Save Config

GENERAL ▾  
CATALOG ▾  
CUSTOMERS ▾  
SALES ▾  
DIALOG INSIGHT ▲  
**Mapping**  
General  
SERVICES ▾  
ADVANCED ▾

Customer Mapping Configuration

Customer Fields Mapping [website]

Magento field	Dialog Insight field	Action
Firstname ▾	Prénom ▾	🗑️
Lastname ▾	Nom ▾	🗑️
Email ▾	Courriel ▾	🗑️
City ▾	region ▾	🗑️

Add

Add the magento Customer to mapping ?

- a. Map all the **Magento** fields that you wish to sync with **Dialog Insight** fields.
- b. Map the **Magento** newsletter subscription field to the right one in **Dialog Insight** fields.

Note : All the products and transactions fields will be automatically sync.