

#### Removing chat-based customer data from Puzzel Digital Engagement

This section outlines how to remove chat based customer data from Puzzel Digital Engagement.

## How to configure "Time to live"

Stored chat history has a configured time to live in Puzzel Digital Engagement.

Users can adjust these settings within the Admin Tool for Digital Engagement:

- 1. Navigate to "Configure" on the menu to the left of the screen
- 2. Click on "Case types"
- 3. In the "Edit case type" page navigate down to the "Time to live" section
- 4. Here you can enable or disable the option, and allocate the number of days that the chat history will be stored for.

puzzel.	CASE MANAGEMENT	$( \circ ) $								
n Dashboard	Actions Action panels	Edit case type: Loans								
	Canned responses	Name								
Q. Case browser	Case types	Loans								
🐵 Monitor	Closures	Time to live Time until the case and its related conversations are deleted.								
⊖ Analyze	Forms	Enabled 14 Days								
Engoge	iempiates	Action panels Closures Forms Canned responses								
₩ Configure	USER MANAGEMENT									
n Publish	Groups	Available	0,		Selected					
😂 Account	DESKTOP SETTINGS	Vergic test		«	Live agent					
🖗 Plugins	Page categories			»						

### Chat anonymity

In the case that there is no system configuration, the chats remain anonymous.

There is the capability to identify patterns written in running text. This means that information such as credit cards and social security numbers can be recognised and wiped automatically. Regular expression based pattern matching is used to support wiping text in chat messages.

The system recognises credit card formats by default. For other patterns, please reach out to Puzzel Support.

### System configuration to gather personal consumer data

A search by identifier can be set up in cases where the system is configured to recognise and use identifiers (such as email, phone numbers or others).

This setting is turned off by default. There is the option to turn it on as part of an implementation project or by contacting Puzzel Support and ordering a configuration change project.



# **Deleting chat content**

All chats that can be found using the search function can be easily deleted in the user interface:

- 1. Open the Case Browser Tool from the menu on the right hand side of the screen
- 2. Search for the chat using the relevant fields available in the "Search by agent" and "Search by case ID" panes.

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	Case browser									
771 Dashboard	The Case browser lets you search for specific cases associated with an agent. From the list of results you can get the dialog transcript and details about the dialog.									
√ Statistics										
Q. Case browser	Search by agent Search by case ID									
🚳 Monitor	By agent  From  From  To									
	Type to search by name or 10									
⊕ Analyze	Get first 💿 Number of cases to retrieve 💿									
Engage	Newest Oldest									
lit Continue	Include ongoing cases									
III Configure										
Publish	ResultTotal number of retrieved cases: 100									
Account	#         Date         Y         Opened         Closed         Y         Agent         Y         Case type         Y         Group         Y         Closure         Outcome         Score         Y									
Plugins	1 12/21/2022 10:13 AM 10:14 AM BOT BOT Intro Case BOT Visitor clos Positive -									

In the case that non-anonymous chat search has been enabled (either by integration to 3rd party authorisation providers or by logging personal data related to the visitor) the "Search by customer ID" pane will also be visible. This can also be used to search for consumer identified data by the search methods configured for your account.

#### Case browser

The Case browser lets you search for specific cases associated with an agent. From the list of results you can get the dialog transcript and details about the dialog.

Search by agent Search by case ID	Search by customer ID		
By customer id	Customer id type	From @	To @
Type to search by customer id	✓ customer id facebook	m 00:00	<u></u> 23:59
Get first 💿	contactid		
Newest O Oldest	email sms	Clear filter Get cases	
In the design of the second			
Include ongoing cases			
□ Include ongoing cases	Load 100 more		
C Include ongoing cases  eSultTotal number of retrieved cases: 0  # Date  V Opened  Clo	osed v Agent v	Case type V Group V Clu	osure × Outcome Score × =

3. All found matching chats are listed in the results pane



#### ResultTotal number of retrieved cases: 100 Load 100 more

#	Date 🗸	Opened ~	Closed ~	Agent ~	Case type 🛛 🗸	Group ~	Closure ~ Outcome	Score ~
1	12/21/2022	10:13 AM	10:14 AM	BOT	BOT Intro Case	BOT	Visitor clos Positive	-
2	12/21/2022	10:11 AM	10:12 AM	Rickard Janz	Mutual funds	Live Agent	ClosedInPu Neutral	-
3	12/21/2022	8:21 AM	8:23 AM	BOT3	-	BOT	Visitor clos Positive	-
4	12/21/2022	8:16 AM	8:30 AM	Rickard Janz	Mutual funds	Live Agent	ClosedInPu Neutral	-
5	12/20/2022	2:16 PM	2:17 PM	BOT2	BOT Intro Case	BOT		-
6	12/20/2022	2:10 PM	2:13 PM	BOT	BOT Intro Case	BOT		-
7	12/20/2022	11:57 AM	11:58 AM	MarcusDemo	-	Live Agent	ClosedInPu Neutral	-
0	10/00/2022	11.55 444	12:05 014	MarguaDama	Manufa saas	Dis Among	Classedia Du Maureal	

- 4. Click on a specific chat to retrieve it
- 5. In the pop-up window that appears, click the "Delete Case data" button to delete the chat data

	Case Details	Cas	e ID: D8A9361	2-B1AB	42B4-AC44-3	5D8759/	ABA6B	×		
cases associate	Transcript	Overview	N						ne dialog.	
	Application	Error	Decem	ber 21 -	2022	show visi	tor navigatio	n		
From	Rickard Janz - Welcome to NY Rickard Janz - Rickard Janz - Thank you for o	10:11:55 A Y bank! How 10:11:55 A 10:12:38 A contacting	M w can I help yc M M us! Have a gre	ou today eat day.	?					
100					Close	Del	ete Case dat	a		
00 Load 100	more									
sed ~ Age	ent	~	Case type	~	Group	~	Closure	~ 0	Outcome	Score