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.
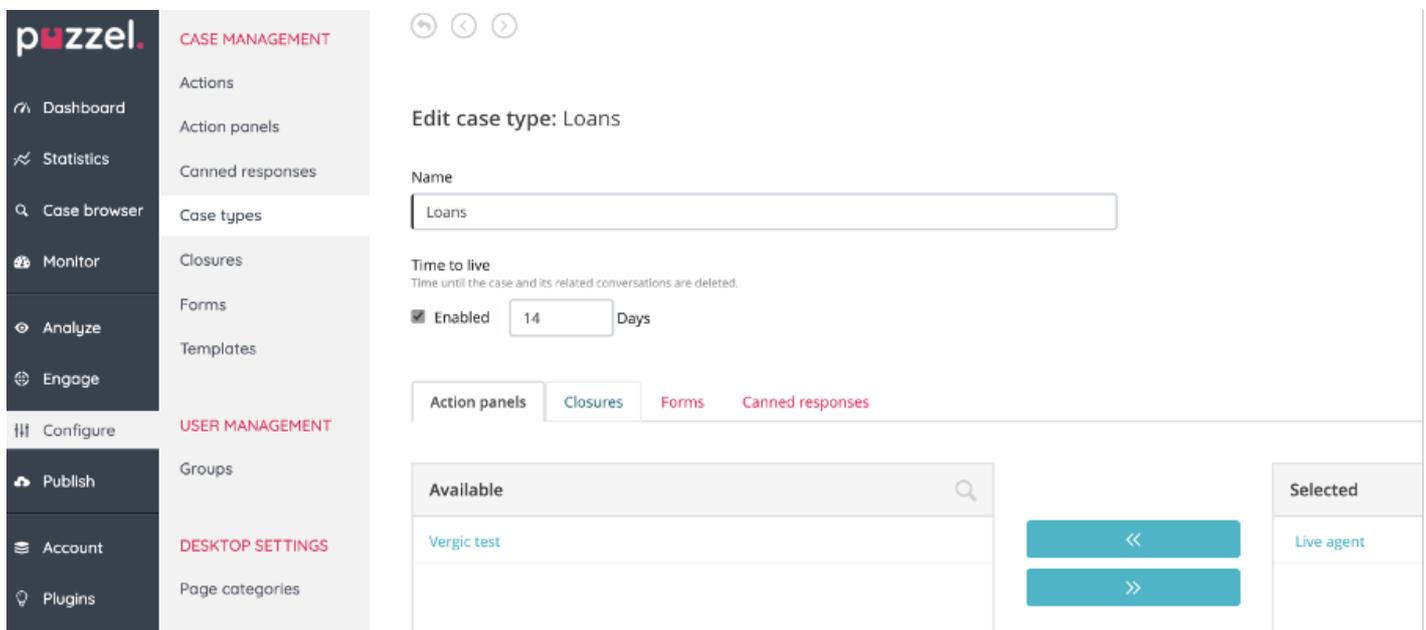
Chat anonymity

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.

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.

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

# ...	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	-
8	12/20/2022	11:56 AM	12:05 PM	MarcusDemo	Vergis test	Live Agent	ClosedInPu...	Neutral	

Result Total number of retrieved cases: **100**   Load 100 more

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   Case ID: D8A93612-B1AB-42B4-AC44-35D8759ABA6B   ✕

Transcript   Overview

Application Error   ☐ Show visitor navigation

December 21 - 2022

Rickard Janz - 10:11:55 AM
Welcome to NY bank! How can I help you today?
Rickard Janz - 10:11:55 AM
Rickard Janz - 10:12:38 AM
Thank you for contacting us! Have a great day.

Close   Delete Case data