

## Agent Assist Contact Management System

If you have access to page Services Agent Assist you will see the link to the *Contact Management system* and possibly the link to the *Knowledgebase Management system*.



The Agent Assist Contact Management system

The screenshot displays the 'Contacts' management interface. At the top, there is a search bar labeled 'Search for contacts' and the Puzzel logo. Below the search bar, the title 'Contacts' is shown with a help icon and a note 'Number of contacts: 14'. A table lists the contacts with columns for Name, Email, Phone, Mobile, and Title. The table contains 14 rows of contact information.

Name	Email	Phone	Mobile	Title
[Redacted]	sv[Redacted]@puzzel.com		+474191[Redacted]	Boss
[Redacted]sen	kje[Redacted]	+472189[Redacted]	+474190[Redacted]	Worker
[Redacted]ug	pa[Redacted]@puzzel.com	+472189[Redacted]	+479821[Redacted]	Product Owner
[Redacted]ed	me[Redacted]@puzzel.com	+442037[Redacted]	+447714[Redacted]	Boss
[Redacted]erglund	ch[Redacted]@puzzel.com		+479591[Redacted]	Worker
[Redacted]adnes	kri[Redacted]@puzzel.com		+474191[Redacted]	Big boss
[Redacted]k	ve[Redacted]@puzzel.com		+479849[Redacted]	Worker
[Redacted]er	an[Redacted]@puzzel.com		+479345[Redacted]	Worker
[Redacted]	kje[Redacted]		+479093[Redacted]	Worker
[Redacted]in	an[Redacted]@puzzel.com	+472189[Redacted]	+479821[Redacted]	Product Owner
[Redacted]al	me[Redacted]@puzzel.com		+474702[Redacted]	Worker
[Redacted]	pe[Redacted]		+474814[Redacted]	Paal test
[Redacted]tdal	ra[Redacted]@puzzel.com		+474005[Redacted]	
[Redacted]ersrud	ch[Redacted]@puzzel.com		+479572[Redacted]	

In the Contact management system, you can:

- Upload a file to add/replace the (customer) contacts in Agent Assist\*
- Configure settings for FTP import of contacts
- See contacts/search for contacts
- See the contact file Import log

\* If configured, these contacts are also available and searchable in the Agent application as search source **Customers** when the agent wants to make an outbound call or when choosing Forward to consult or transfer the call.

Agent Assist in the Puzzel Agent application needs a contact list so that the **correct contact** can be found and shown to the agent when the agent receives a call/chat/email.

To be able to find calls and emails/chats in the **Archive** and show it in Agent Assist **interaction history**, the calls must be from the number(s) registered on the contact, and the emails/chats must be from the email address(es) registered on the contact.

The storage time for General information in the Archive determines how old calls/chats/emails that will appear in the Agent Assist Interaction history.

The Agent Assist Interaction history shows some of the information related to calls/chats/email from the Archive, but not all

details.

The contact file(s) can be uploaded in the Agent Assist Contact management system, or you can schedule a contact file export task from your CRM system so that Puzzel can fetch a contact file from Puzzels FTP server e.g. each night/week.