

## 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

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Home File upload Settings Log Help

Search for contacts

**Contacts ?** Number of contacts: 14

Name	Email	Phone	Mobile	Title
sv...	sv...@puzzel.com		+474191...	Boss
kje...	kje...@puzzel.com	+472189...	+474190...	Worker
pa...	pa...@puzzel.com	+472189...	+479821...	Product Owner
me...	me...@puzzel.com	+442037...	+447714...	Boss
ch...	ch...@puzzel.com		+479591...	Worker
kri...	kri...@puzzel.com		+474191...	Big boss
ve...	ve...@puzzel.com		+479849...	Worker
an...	an...@puzzel.com		+479345...	Worker
kje...	kje...@puzzel.com		+479093...	Worker
an...	an...@puzzel.com	+472189...	+479821...	Product Owner
me...	me...@puzzel.com		+474702...	Worker
pe...	pe...@puzzel.com		+474814...	Paal test
ra...	ra...@puzzel.com		+474005...	
ch...	ch...@puzzel.com		+479572...	

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.