Call recording

This article contains detailed information about Puzzel's call recording functionality.

Incoming calls to and outgoing calls from a Puzzel Contact Centre solution can be recorded, and the sound recording files can be made available in the Administration Portal's Archive, or the files can be delivered to the Puzzel customer via Puzzel's FTP server.

Which calls are recorded

"Forced" recording on queue/agent

In the Puzzel service configuration you can define that

- *all calls from a specific **queue** to agents be recorded*
  (configured under System Queue settings)
- *all calls to all agents in a specific **user group** (or to a specific agent) be recorded*
  (configured under Users - Products - Recording)

A call from a queue answered by an agent is recorded if forced recording is configured on the queue or on the agent (or on both).

If you want to use **forced** recording, you should inform about the recording in the IVR, and also inform agents.
When a call is being recorded due to forced recording, the agent can not stop/cancel the recording.

Agent-to-agent calls are recorded only if the agent that initiates the call has forced recording ON, and such a recording is linked to the agent that initiated the call.

"Pending" recording on queue

In the Puzzel service configuration you can define that *all calls from a specific queue to agents be recorded, but the recording file will only be saved if the agent clicks 'Save recording' before the call ends or is transferred.* This is called ***pending*** recording on queue, and it's configured under System Queue settings.

If the agent clicked 'Save recording' by mistake or the caller later tells the agent that recording can not be saved, the agent can click 'Save recording' once more to **not** save the recording, but only before the call has ended.

If you have configured forced recording for an agent and this agent receives a call from a queue with pending recording, this call will have pending recording.

When to use pending recording?
In some cases, especially related to outbound calls (initiated by agent or through a Dialler queue), there might be a need to start recording the call from start just in case the agent during the call learns that this call must be recorded.

Could and should my company use “pending” recording?
Before you possibly start using pending recording for one or more of your queues, you should carefully analyse your need and investigate if it’s ok to use this functionality in your company on this specific queue. If you are in doubt if you can use such pending recording, please consult your legal department. Don’t turn on pending recording if you are not sure this is really needed and ok with your country’s rules and regulations for call recording.

If you conclude to start using pending recording, you must give agents training and information on what to say and how to behave. If the agent during a call concludes that this call should be recorded, the agent must inform the caller and ask if it is ok to record the call. Only if the caller accepts, the agent should click ‘Save recording’. Since the recording file will contain the whole conversation with this agent from when the agent answered, the agent should say something like “*Is it ok that I record this call due to reason xxxx?*”, and **not** “Is it ok that I start to record this call from now on?”. If you need to use the call recording file or send it to the caller/customer, then what is said by the agent and the caller around informing and getting consent to record is all there.

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Agent manually starting recording

It is possible to let the agents manually start/stop recording during an ongoing call by pressing *Start/Stop Recording* in the Agent application. Please note that if a forced recording is ongoing, the agent *cannot* stop the ongoing recording or start a new recording for this call.

Caller accepting/denying recording

If the laws and regulations in your country require that you to give the caller the option to deny call recording, or you need the **caller's acceptance** to record the call, your Puzzel solution should have audio/menu modules that

- informs the caller that the call will be recorded unless he/she dials x to **deny** it, OR
- informs the caller that you want to record the call, and he/she can dial x to **accept**

The incoming call's system variable "***deny recording***" can be set to "yes" if the caller

- denies recording, OR
- doesn't accept recording

If deny recording = true for a call, this prevents the call from being recorded even if the call should have been recorded due to forced or pending recording on queue or forced recording on agent.

If deny recording = true for a call, the agent can not start manual recording in the Agent application.

Option to record agent if caller denies recording
If you want to record what an agent is saying even if the caller denied you to record the call, this is possible by turning on a new property titled "*Recording of the agent if recording is 'forced' on agent/queue and caller denies recording*". Before you possibly turn on this property, we strongly recommend you to consider if it's really needed, if you need to adjust the wording in the IVR, if it's ok for your agents, and if so, the you should inform agents about it. In the agent application the agent will see "*Automatic Recording (without caller)*" if such a recording is happening.

Consult calls, 3-way conferences, and call transfers

While an agent is connected to a caller and the call is being recorded, the agent can make a consult call, a 3-way conference or transfer the call to another agent/number/queue.

The **main principle** for recording is that if a call connected to an agent is being recorded, everything this agent says and can hear will be recorded (in one file) until this agent (the active one) hangs up or transfers the call.

Exceptions:

- If the agent, during a call that is being recorded, clicks ***Put on hold***, we will not record what the caller or the agent says during the on hold period (but instead we are recording silence, on-hold message or music while on hold).
- Since we are not able to play an *Recoding ongoing, do you accept recording*? announcement to the consulted party (to notify and get an acceptance), the standard solution for recording related to **consult calls** is as follows:
    - If the recorded agent makes a consult call to another **Puzzel agent** (considered to be internal), we will continue recording and include what the consulted agent says.
        - If the recorded agent now includes the caller into a conference, all 3 parties are recorded.
    - If the recorded agent makes a consult call to a **phone number** (considered to be external), we will not record this consult call, but instead have **silence** in the recording file!
        - If the recorded agent now includes the caller into a conference, the agent and the caller is recorded (but not the consulted party)

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Recording related to consult calls can be changed!

- If you do **not** want to include what is being said in a **consult call to a Puzzel agent** in the recording file, please ask Puzzel to configure this.
  (Puzzel will set 'system_rec_allow_transferee_user' to false)
- If you want to **include** what is being said in a **consult call to a phone number** in the recording file, please ask Puzzel to configure this for you.
  If you do, you should tell your agents to inform any consulted external party that the call is being recorded.
  (Puzzel will set 'system_rec_allow_transferee_request' to true)

If you want the old behaviour (how it worked prior to September 2022), that is, to include what the recorded agent says during a consult call also when the consulted party is not included in the recording file, please contact Puzzel. (Puzzel will set 'system_rec_allow_callee_only' to true)

If the recorded agent **transfers** the call to another queue or agent, the recording stops. A new recording starts only if recording is forced on the new queue or forced on the new agent receiving the call, or if the new agent clicks ‘Start Recording’.

Censor part of a recording

If the agent during a call that is being recorded (manually started or forced) needs to give or receive information that should not be recorded (e.g. credit card number, social security number etc.), the agent can click Censor and then Stop Censor. In the recording file, the part between Censor and Stop Censor will contain noise and not what the caller and agent said.

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