

## Kontrollerer kundens rekord

For å sjekke kundeoppføringen:

1. Gå til Kunder-> Kunder -> Aktiv for å se en liste over alle aktive kunder. Klikk på rediger -knappen mot kunden for å se detaljene.

The screenshot shows the Puzzel CRM dashboard. The top navigation bar includes icons for Dashboard, Tickets (with a red notification badge '9'), Reports, Activity, Customers, Campaigns, Settings, and Help. The 'Customers' menu is open, showing 'Active' and 'Deleted' options. Below the navigation bar, there are buttons for 'Import From CSV', 'New Customer', and a notification badge '16'. The main content area displays a table of customers with columns for Name, Email, Phone Number, Custom Attributes, and Actions.

Name	Email	Phone Number	Custom Attributes	Actions
Andreas Wallin	andreas.w [redacted]			[Edit] [Add] [Delete]
Christlan Thorsrud	christian: [redacted]			[Edit] [Add] [Delete]
Harald Bekken	harald [redacted]	+ [redacted]	Custom Attributes: Oslo Organization: Puzzel Department: Product	[Edit] [Add] [Delete]

2. Første fane viser kundedetaljer som kan endres og lagres.

The screenshot shows the 'Details' view of a customer. The top navigation bar includes 'Details', 'Tickets', 'Campaigns', and 'Audit Trail'. The main content area is divided into 'Attributes' and 'Custom Attributes'. The 'Attributes' section includes fields for 'Mood' (with a dropdown arrow), 'Name' (with a value of 'jayanthi Prashanth kumar' and a character limit of 'max: 70 characters'), 'Email Address' (with a value of 'jayanthi\_prkumar@yahoo.co.in'), and 'Phone number'. The 'Custom Attributes' section has a table with columns for 'Name' and 'Value \*', and a '+ Add' button. Below these sections are 'Communication Preferences' with 'SMS Consent' and 'Email Consent' both set to 'YES'. At the bottom right, there are 'Cancel' and 'Save' buttons.

3. Andre fane vil vise Saker, der agenten kan sjekke kundeoppføringen for å forstå sakshistorikk og åpne saker.

Details Tickets Campaigns Audit Trail Export

Tickets list Clear Selection Select all on page

Show 10 entries

	#	Subject	Assigned	Status	Response Target	Resolve Target	Priority	Team	Channel	Last Update	From/To	Tags
	51	Test ticket		Resolved			Normal	All Users	ticket	13 days ago	jayanthi_prkumar@yahoo.co.in	communication

Showing 1 to 1 of 1 entries (filtered from 53 total entries) Previous 1 Next

4. Tredje fane vil vise kampanjehistorikk som kunden har mottatt.

Details Tickets Campaigns Audit Trail Export

Email Campaign Deliveries SMS Campaign Deliveries

Active Deliveries

Campaign	Status	Email	Time
New feature announcement duplicate	Saved	jayanthi_prkumar@yahoo.co.in	N/A
New feature announcement 2020-09-19 07:55:14	Saved	jayanthi_prkumar@yahoo.co.in	N/A
Upooming release	Saved	jayanthi_prkumar@yahoo.co.in	N/A

Showing 1 to 3 of 3 entries 1

Previous Deliveries

Campaign	Status	Email	Time	Open	Click
New feature announcement	Delivered	jayanthi_prkumar@yahoo.co.in	Sep 19, 2020 @ 9:35am	1	
Trial campaign	Delivered	jayanthi_prkumar@yahoo.co.in	Sep 19, 2020 @ 9:28am	3	

Showing 1 to 2 of 2 entries 1

5. Den fjerde fanen vil vise kundekontaktens endringshistorikk (revisjonsløype).

Details Tickets Campaigns Audit Trail Export

Full Name  All Time  Search

	Logicalware	14 days ago		Customer Jayanthi Prashanth kumar added from manual creation
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