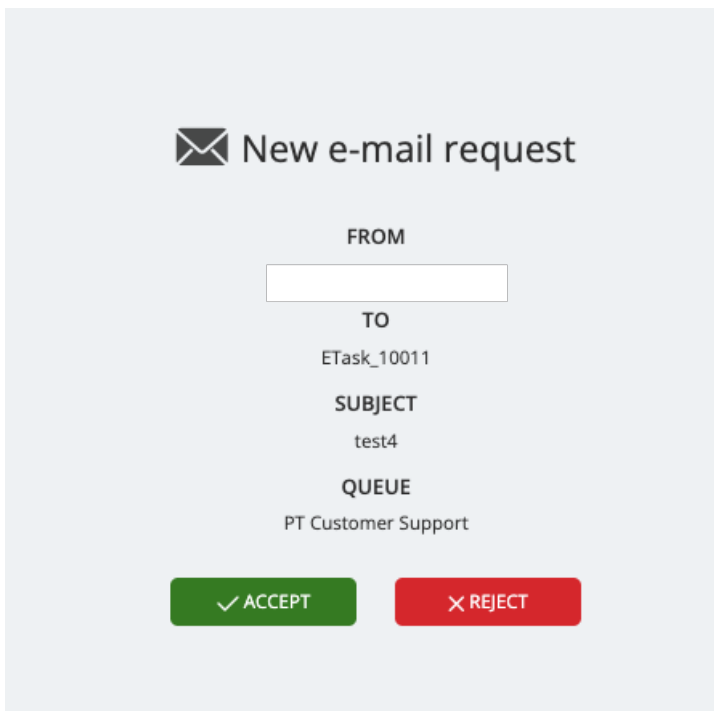


## Login and user access

### Logging on in a Puzzel Contact Center Integrated solution

#### Method 1: Email Request

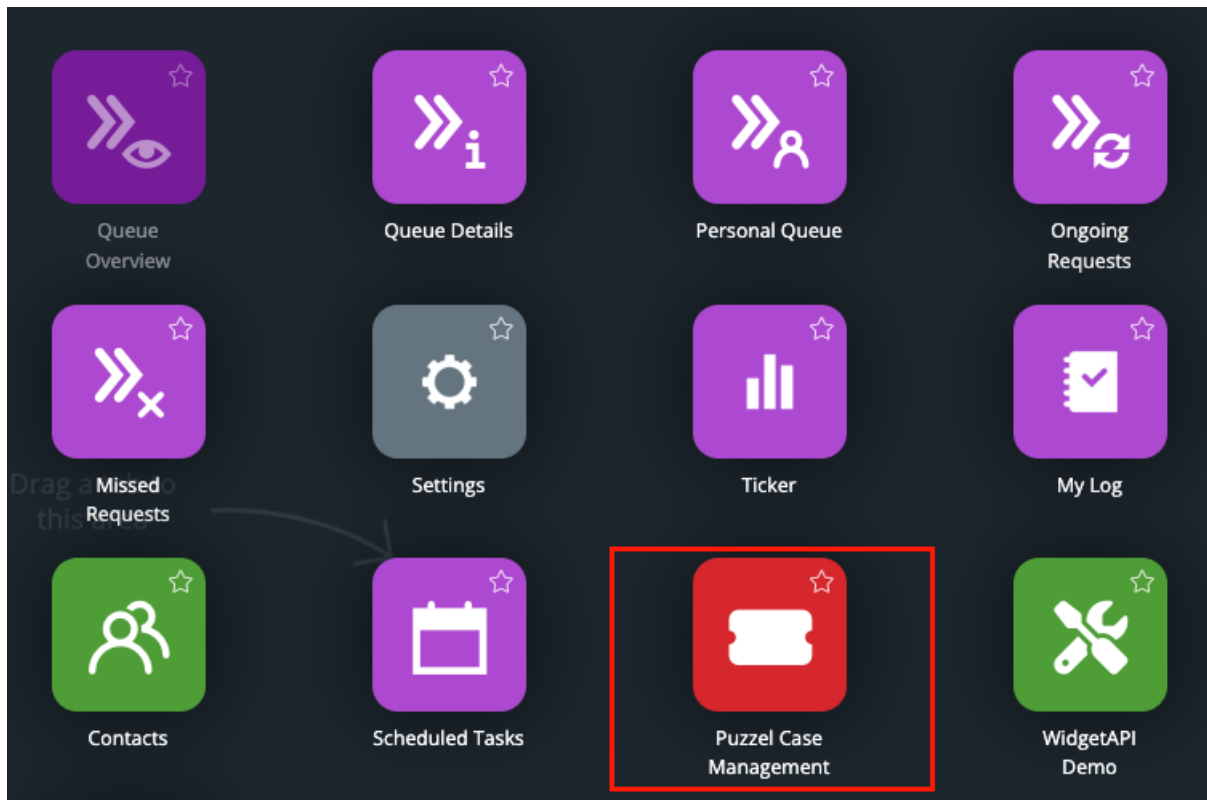
1. Log in to the Puzzel Agent Application via (agent.puzzel.com) using your assigned username and password.
2. Set your availability status to "Available" on a profile that's skilled for you to receive email requests.
3. The first time you accept an email request originating from the Puzzel Case Management, a user account will be automatically created for you in the system. Any subsequent request will log you in automatically.



4. If you are accepting a ticket from a contact center queue on which you are skilled. If you are not currently a member of the 'Team' assigned to the ticket, this will automatically be added to your user profile upon accepting the request.

#### Method 2: Puzzel Case Management Widget

1. Log in to the Puzzel Agent Application via (agent.puzzel.com) using your assigned username and password.
2. Navigate to a page or area where a widget for the 'Puzzel Case Management' has been configured.
3. Upon accessing the widget, if a user account does not already exist for you, it will be automatically created.



#### Note

##### **User Credentials and Customization**

Please note, with both methods, agents will be created with the standard 'Basic User' credentials in the Puzzel Case Management application, and no user signature will be initially applied.

An admin user can consider editing the user profile in the Puzzel Case Management application after it's created to customize the user's preferences and access rights. This can include adding a user signature, adjusting the user's permission levels, or assigning specific tasks or responsibilities.

#### Note

##### **Single Sign-On**

Please note, you will not be prompted to log in separately to the Puzzel Case Management. When accessing the system via the Puzzel Contact Center, Single Sign-On (SSO) is applied to make the experience seamless for you.

#### Note

##### **Troubleshooting**

If you encounter any difficulties, or if you are being prompted to enter a different set of credentials for the Puzzel Case Management, please raise a support case with our support team. You can do this by visiting [help.puzzel.com](https://help.puzzel.com) and following the instructions for raising a case. Our team will then check to ensure your setup is correct.

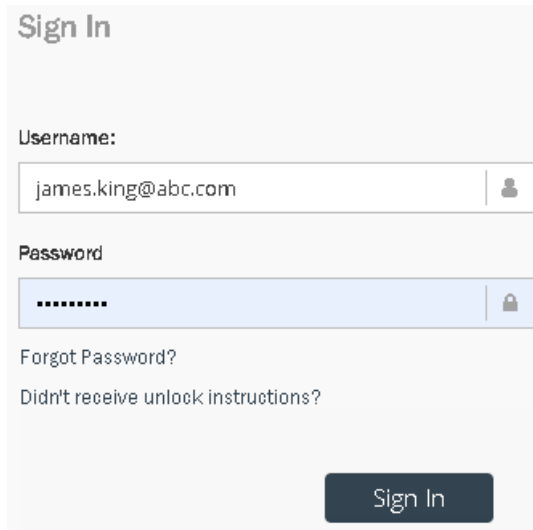
### Logging on in a standalone solution

Puzzel Case Management is available through your Internet browser and the URL to your solution will be provided to you during implementation. For example: tenantid.logicalware.com.

To be able to login into the application, you will need user credentials. The Puzzel implementation team will do the initial configurations for the services subscribed by your organisation and provide admin credentials for you. You can then create agents and additional admins as required.

### Signing in to Puzzel Case Management

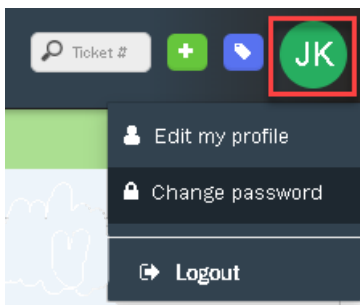
Open the application in the browser and enter the user credentials and click on **Sign In**.

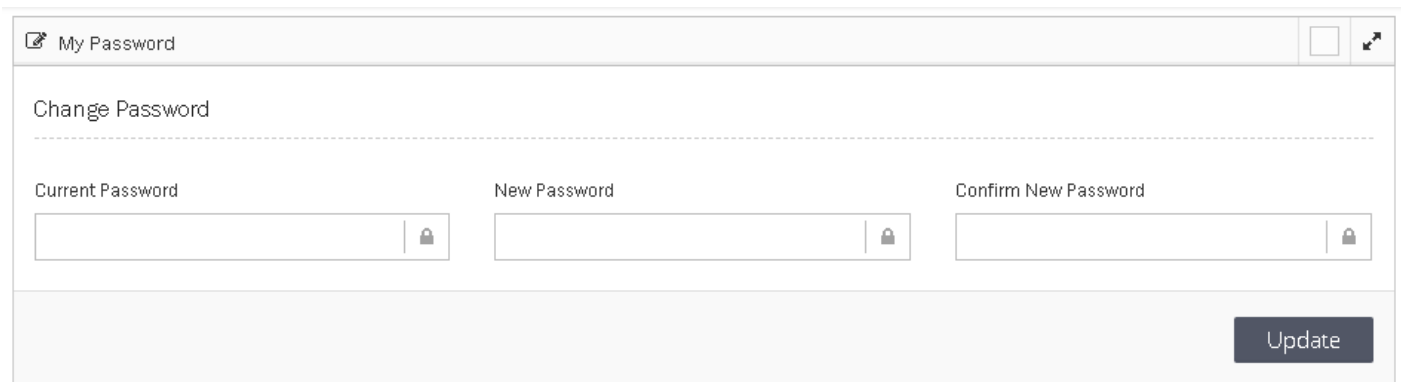


The image shows a 'Sign In' form with the following elements:

- Sign In** header
- Username:** Input field containing 'james.king@abc.com' and a user icon on the right.
- Password:** Input field with masked characters (dots) and a lock icon on the right.
- Links: 'Forgot Password?' and 'Didn't receive unlock instructions?'
- Sign In** button at the bottom.

If you have forgotten your password and wish to reset it, click on **Forgot Password**. and follow the instructions. This is possible only if you are already registered with your email address.  
If it is the first time you are logging in, do not forget to change your password. To change the password, click on your name on the top right corner of the screen as shown below and select **Change password**.





The screenshot shows a web form titled "My Password" with a sub-heading "Change Password". Below the heading, there are three input fields: "Current Password", "New Password", and "Confirm New Password". Each field has a small lock icon on the right side, indicating that the text is masked. At the bottom right of the form, there is a dark blue button labeled "Update".

Enter the current and new password and click on **Update** to save it.

### Logging out

To log out of the application, click on your name on the top right corner of the screen and select Logout.

