

Removing chat-based customer data from Puzzel Digital Engagement

This section outlines how to remove chat based customer data from Puzzel Digital Engagement.

How to configure “Time to live”

Stored chat history has a configured time to live in Puzzel Digital Engagement.

Users can adjust these settings within the Admin Tool for Digital Engagement:

1. Navigate to “Configure” on the menu to the left of the screen
2. Click on “Case types”
3. In the “Edit case type” page navigate down to the “Time to live” section
4. Here you can enable or disable the option, and allocate the number of days that the chat history will be stored for.

The screenshot displays the 'Edit case type: Loans' configuration page in the Puzzel Admin Tool. The interface features a dark sidebar on the left with navigation options: Dashboard, Statistics, Case browser, Monitor, Analyze, Engage, Configure, Publish, Account, and Plugins. The main content area is titled 'Edit case type: Loans' and includes a 'Name' field containing 'Loans'. Below this is the 'Time to live' section, which is currently 'Enabled' and set to '14 Days'. The page also shows a table with 'Available' and 'Selected' columns. The 'Available' column contains 'Vergic test' and the 'Selected' column contains 'Live agent'. Navigation buttons for the table are visible on the right side.

Chat anonymity

In the case that there is no system configuration, the chats remain anonymous.

There is the capability to identify patterns written in running text. This means that information such as credit cards and social security numbers can be recognised and wiped automatically. Regular expression based pattern matching is used to support wiping text in chat messages.

The system recognises credit card formats by default. For other patterns, please reach out to Puzzel Support.

System configuration to gather personal consumer data

A search by identifier can be set up in cases where the system is configured to recognise and use identifiers (such as email, phone numbers or others).

This setting is turned off by default. There is the option to turn it on as part of an implementation project or by contacting Puzzel Support and ordering a configuration change project.

Deleting chat content

All chats that can be found using the search function can be easily deleted in the user interface:

1. Open the Case Browser Tool from the menu on the right hand side of the screen
2. Search for the chat using the relevant fields available in the “Search by agent” and “Search by case ID” panes.

Case browser

The Case browser lets you search for specific cases associated with an agent. From the list of results you can get the dialog transcript and details about the dialog.

Search by agent | Search by case ID

By agent From To

Get first Newest Oldest Number of cases to retrieve

Include ongoing cases

Result Total number of retrieved cases: 100

| # ... | Date | Opened | Closed | Agent | Case type | Group | Closure | Outcome | Score |
|-------|------------|----------|----------|-------|----------------|-------|-----------------|----------|-------|
| 1 | 12/21/2022 | 10:13 AM | 10:14 AM | BOT | BOT Intro Case | BOT | Visitor clos... | Positive | - |

In the case that non-anonymous chat search has been enabled (either by integration to 3rd party authorisation providers or by logging personal data related to the visitor) the “Search by customer ID” pane will also be visible. This can also be used to search for consumer identified data by the search methods configured for your account.

Case browser

The Case browser lets you search for specific cases associated with an agent. From the list of results you can get the dialog transcript and details about the dialog.

Search by agent | Search by case ID | Search by customer ID

By customer id Customer id type customer id facebook contactId email sms

From To

Get first Newest Oldest

Include ongoing cases

Result Total number of retrieved cases: 0

| # ... | Date | Opened | Closed | Agent | Case type | Group | Closure | Outcome | Score |
|-------|------|--------|--------|-------|-----------|-------|---------|---------|-------|
|-------|------|--------|--------|-------|-----------|-------|---------|---------|-------|

3. All found matching chats are listed in the results pane

Result Total number of retrieved cases: 100 [Load 100 more](#)

| # ... | Date | Opened | Closed | Agent | Case type | Group | Closure | Outcome | Score |
|-------|------------|----------|----------|--------------|----------------|------------|-----------------|----------|-------|
| 1 | 12/21/2022 | 10:13 AM | 10:14 AM | BOT | BOT Intro Case | BOT | Visitor clos... | Positive | - |
| 2 | 12/21/2022 | 10:11 AM | 10:12 AM | Rickard Janz | Mutual funds | Live Agent | ClosedInPu... | Neutral | - |
| 3 | 12/21/2022 | 8:21 AM | 8:23 AM | BOT3 | - | BOT | Visitor clos... | Positive | - |
| 4 | 12/21/2022 | 8:16 AM | 8:30 AM | Rickard Janz | Mutual funds | Live Agent | ClosedInPu... | Neutral | - |
| 5 | 12/20/2022 | 2:16 PM | 2:17 PM | BOT2 | BOT Intro Case | BOT | | | - |
| 6 | 12/20/2022 | 2:10 PM | 2:13 PM | BOT | BOT Intro Case | BOT | | | - |
| 7 | 12/20/2022 | 11:57 AM | 11:58 AM | MarcusDemo | - | Live Agent | ClosedInPu... | Neutral | - |

- Click on a specific chat to retrieve it
- In the pop-up window that appears, click the "Delete Case data" button to delete the chat data

The screenshot shows a 'Case Details' modal window for Case ID: D8A93612-B1AB-42B4-AC44-35D8759ABA6B. The window has two tabs: 'Transcript' (selected) and 'Overview'. The transcript shows an 'Application Error' on December 21, 2022, with messages from Rickard Janz: 'Welcome to NY bank! How can I help you today?' and 'Thank you for contacting us! Have a great day.' At the bottom right, there are two buttons: 'Close' and 'Delete Case data' (highlighted with a red border).