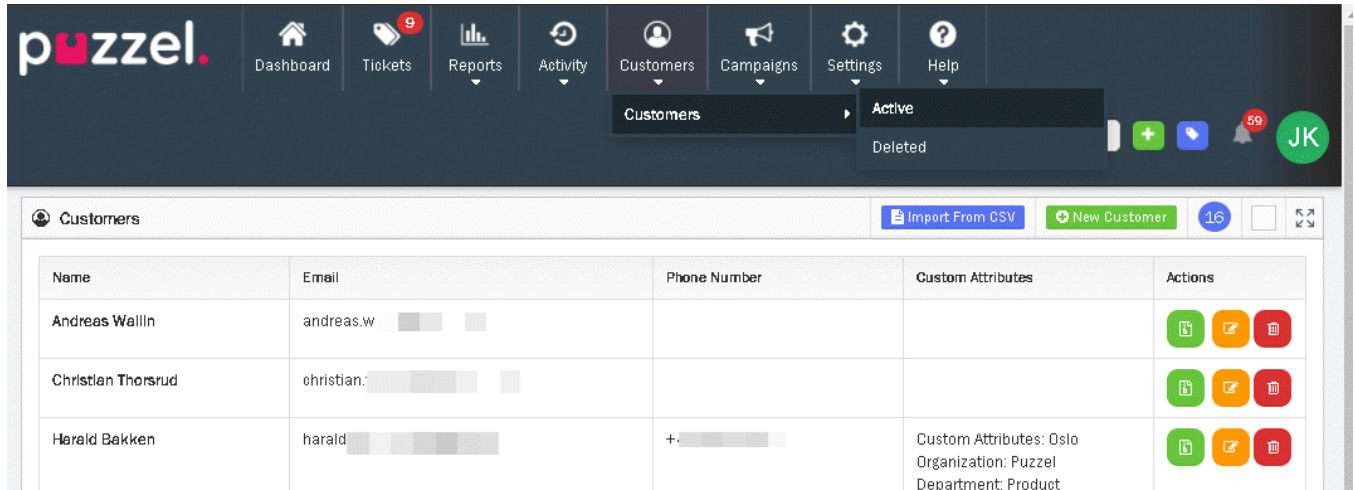


Checking customer record

To check customer record:

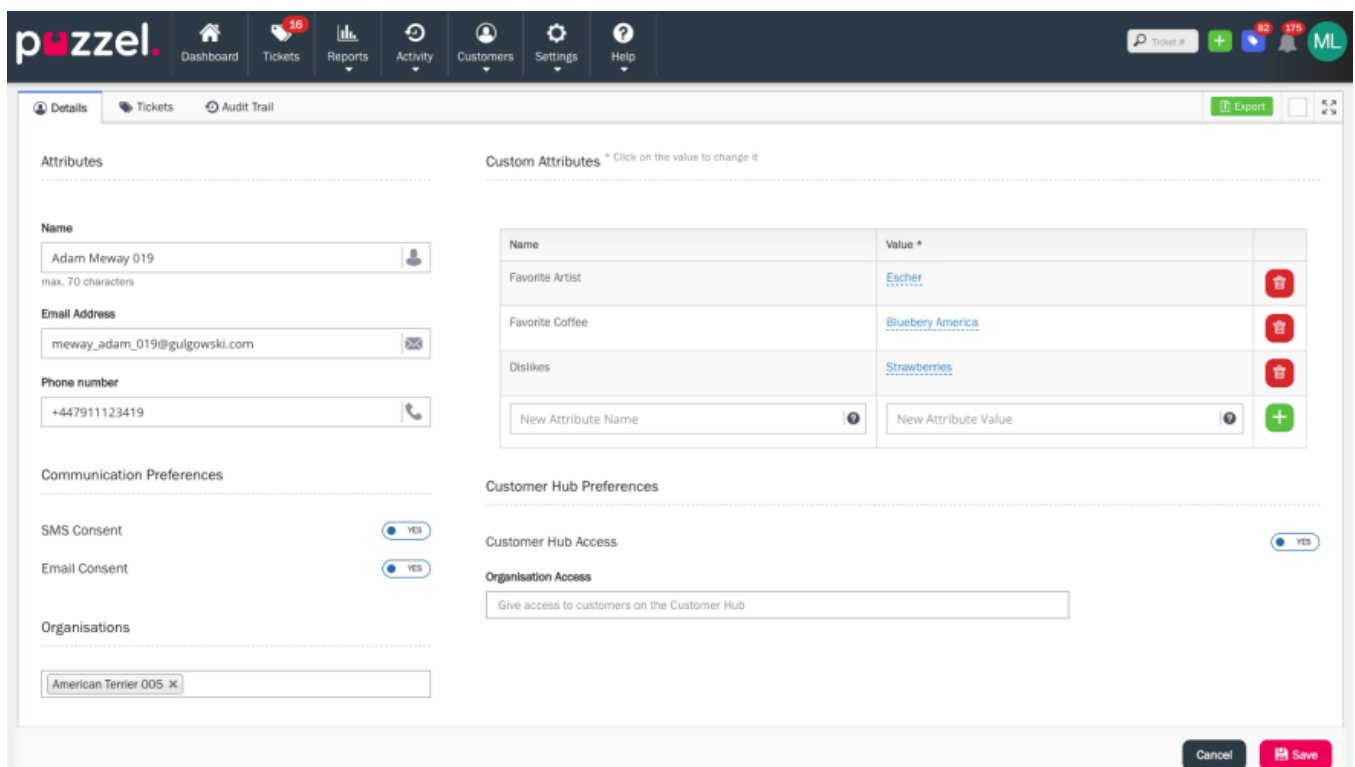
1. Go to Customers-> Customers ->Active to see a list of all active customers. Click on the edit button against the customer to view his/her details.



The screenshot shows the Puzzel dashboard with the 'Customers' menu open. The 'Active' option is selected, displaying a table of active customers. The table has columns for Name, Email, Phone Number, Custom Attributes, and Actions. The first three customers listed are Andreas Wallin, Christian Thorsrud, and Harald Bakken. The Actions column contains icons for edit, delete, and a third icon (possibly a flag or status icon).

Name	Email	Phone Number	Custom Attributes	Actions
Andreas Wallin	andreas.w			[Edit] [Delete] [Flag]
Christian Thorsrud	christian.			[Edit] [Delete] [Flag]
Harald Bakken	harald	+.	Custom Attributes: Oslo Organization: Puzzel Department: Product	[Edit] [Delete] [Flag]

2. First tab displays customer details which can be modified and saved.



The screenshot shows the customer details page for Adam Meway 019. The page has tabs for Details, Tickets, and Audit Trail. The Details tab is active, showing fields for Name, Email Address, Phone number, Communication Preferences, and Custom Attributes. The Custom Attributes section includes a table for Favorite Artist, Favorite Coffee, and Dislikes, as well as a section for New Attribute Name and New Attribute Value.

Name	Value *
Favorite Artist	Escher
Favorite Coffee	Blueberry America
Dislikes	Strawberries

3. Second tab will show Tickets, where agent can check customer record to understand the ticket history or open tickets.

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	JK	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. Third tab will show history of campaigns that customer received.

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
Upcoming 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. 4th tab will show Customer's audit trail

Details Tickets Campaigns Audit Trail Export

Full Name All Time Search

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