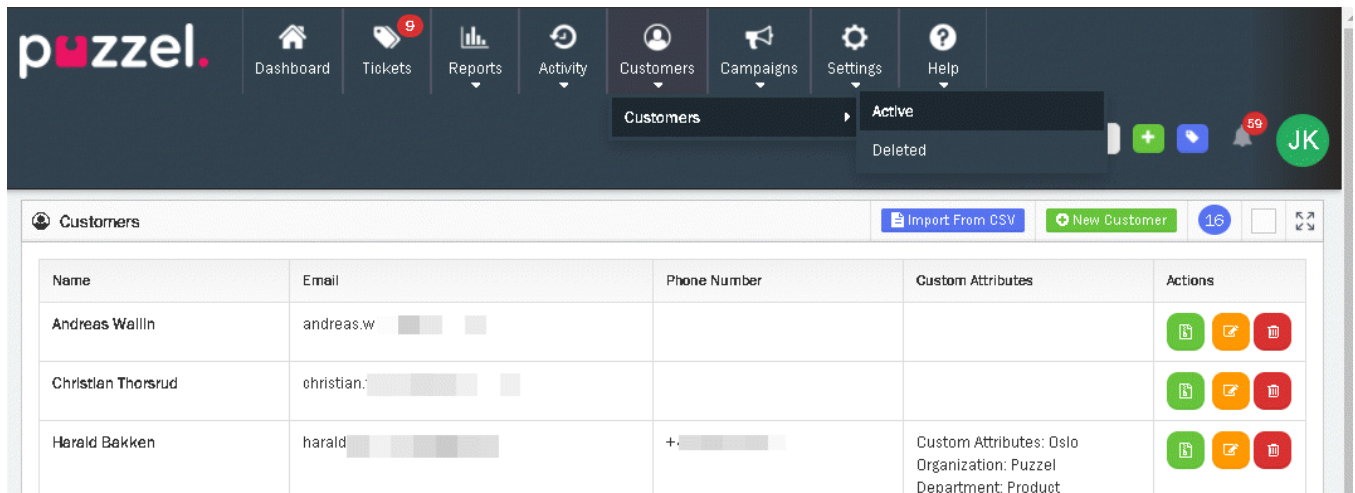


Checking customer record

To check customer record:

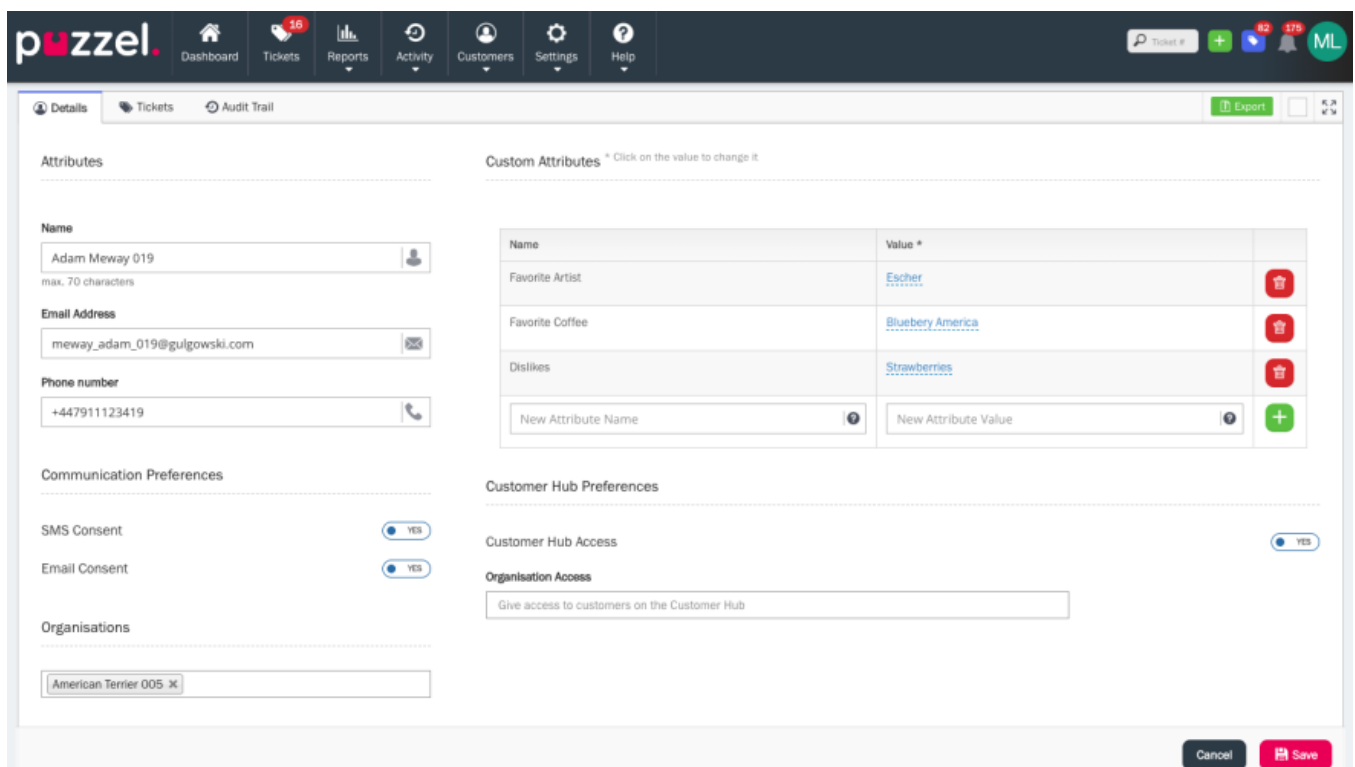
1. Go to Customers-> Customers ->Active to see a list of all active customers. Click on the edit button against the customer to view his/her details.



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 rows show customer details, and the last row shows a summary of custom attributes for Harald Bakken.

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

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 a form for customer information and custom attributes.

Attributes

Name: Adam Meway 019 (max. 70 characters)

Email Address: meway_adam_019@gulgowski.com

Phone number: +447911123419

Communication Preferences

SMS Consent: YES

Email Consent: YES

Organisations

American Terrier 005

Custom Attributes * Click on the value to change it

| Name | Value * | |
|--------------------|---------------------|----------|
| Favorite Artist | Escher | [Delete] |
| Favorite Coffee | Blueberry America | [Delete] |
| Dislikes | Strawberries | [Delete] |
| New Attribute Name | New Attribute Value | [Add] |

Customer Hub Preferences

Customer Hub Access: YES

Organisation Access

Give access to customers on the Customer Hub

Buttons: Cancel, Save

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