

Send secure link to call recordings

Aug 28th 2024: Feature now being tested. To be launched soon...

It's possible for an Archive user (that's given access) to send an email with a 'secure' link to a selection of call recordings or chat logs...

- to an '**external**' recipient, that is, an internal person not having access to the Archive, or an external person
- to an '**internal**' recipient, that is, a person that has access to the Archive (explained at the end of this article)

Send secure link to recordings to a person not having access to Puzzel Archive ('external')

If some admins in your company sometimes need to allow an internal person without access to your Puzzel Archive or an external person to play one or more call recordings or see a chat log(s) (e.g. a caller that complain and require a copy of the recording), we have a solution for this need. To download a call recording file from the Archive and then send it as an email attachment to a person is NOT recommended.

An overview

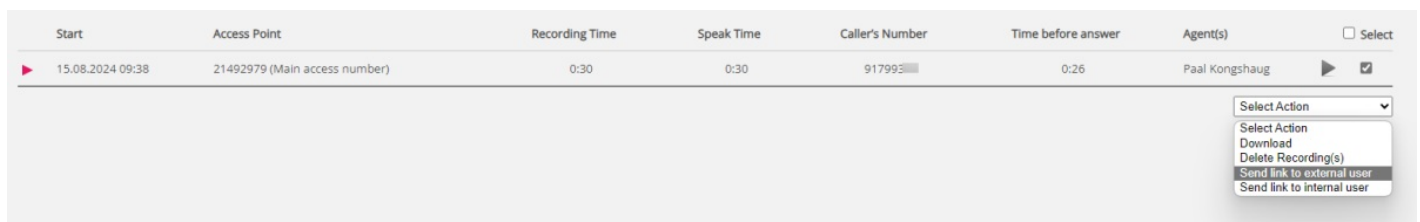
When an Archive user needs to give a person without access to Archive a time-limited access to call recording(s) or a chat log(s), the admin selects the call (chats) and fills in some info in a modal before clicking 'Send'. We will log this action, place a copy of the recording file(s) (chat log(s)) on a secure "external" storage and send an email with a link to a Playback page to the recipient.

When the email recipient clicks on the link, he needs to ask for **one-time code** from the Playback page. The OTC is sent to the intended recipient, and only if correct OTC is entered and the *Terms of use* is accepted, the recipient can play the recording(s). When a recording is played, we will add a record to the Archive Audit log. When the defined number of days has passed, we delete the file(s) from the storage. If an admin by mistake sends an email with a link to the wrong person or selected the wrong call recording, this access given can be cancelled, and if cancelled, we delete the file from the external storage immediately.

How to send a link

Only Admin Portal users with the *Recording* property "*Allowed to send link to call recordings/chats to external and internal users*" set to ON can see and select **action** '*Send link to external user*'.

If you have been given access, you can select one or more recorded calls or chats (max 40) in the Archive search result list and choose action "**Send link to external user**".



Start	Access Point	Recording Time	Speak Time	Caller's Number	Time before answer	Agent(s)	Select
▶ 15.08.2024 09:38	21492979 (Main access number)	0:30	0:30	917993	0:26	Paal Kongshaug	▶ <input checked="" type="checkbox"/>

Select Action

- Select Action
- Download
- Delete Recording(s)
- Send link to external user**
- Send link to internal user

When action *Send link to external user* is clicked, a **modal** where you enter the recipient's name and email address is opened.

The modal is pre-populated based on the values in different properties, but you can adjust the content.

You need to enter the **Recipient's Email address and Name**, and give a **Reason** for the log before you can click *Send email*.

When you click *Send email*, we will copy the files to the external storage, send the email with the link, and log that you send this email. The log entry is shown on page *Archive - External access*.

The **properties used to pre-populate** the content in the *Send link to external user* modal can be found on page *Users – Products* under **Recording** and are prefixed with 'Send link to recording(s)':

- **Availability for days**
 - When the value is set to N days, the access lasts today and N more days. Example: If I on Monday at 10:30 give access for 3 days, the recipient will have access until Thursday 23:59.
- **Email Body**
 - If you change the property value, please remember that “`{{link}}`” can not be deleted. The user that edits the body can adjust the text in the modal, but “`{{link}}`” can not be deleted.
- **Email From** (read-only in the modal)
- **Email Subject**
- **Playback page default Language**
 - The property value (en, no, se, dk, fi, lv, lt, ee) is mapped to the relevant language name in the modal.
 - The language selected in the modal will be the default/initial language on the Playback page the recipient will see, but the recipient can change language on the Playback page. You can only select a language that has a defined *Terms of use*.
 - The language selected in the modal will also be the language used in the **email** sent to the recipient containing **one-time code** ("Your one-time code is xxxxxx. The code is valid for 10 minutes.")

Before clicking 'Send email', you can tick/untick **Show Access number on Playback page** and/or **Show Queue name on Playback page**. The reason for this is that:

- the caller (when she's the recipient of the link) might have dialled a number X and then been forwarded to your '**Access number**' Y, which means the caller might not know the Access number.
- you might have a **queue name** that is "internal" and/or the caller will not recognize it.

The modal for **Chat** looks the same, but 'Show access number' is not shown since it's not relevant.

Email Sender/From address

The email to the recipient is sent from Puzzel's email server, and the default value for From/Sender is **no-reply@puzzel.com**. If you want the recipient to see that the email Sender is e.g. 'no-reply@mycompany.com', you can change the value for the Email From property, but if you do, it's likely that the email ends up in the recipient's Junk folder. To reduce the risk that an email with Sender unlike '@puzzel.com' ends up in the recipient's Junk folder, you need to "authorize Puzzel" in your email system and DNS. The guide for a similar challenge for Puzzel Case Management can be found [here](#).

The recipient's experience

The recipient receives an email with some text including '[link](#)', The email body depends on what's preconfigured and what was changed in the modal, e.g.

Dear Bob Smith.

Here's the link to the call recording(s) as requested:[link](#)

Please note that the file(s) is available for a limited number of days, and that you are not allowed to store or distribute the call recording(s).

Best regards,

My Company name

When the link in the email is clicked, the **Playback page** (mycontent.puzzel.com with a very long, unique suffix) opens, and here the only possible actions are to request a one-time code (**OTC**) and change **language**.

If the user selects a language that does not have any Terms of use defined (by you), we show the English Terms of use.

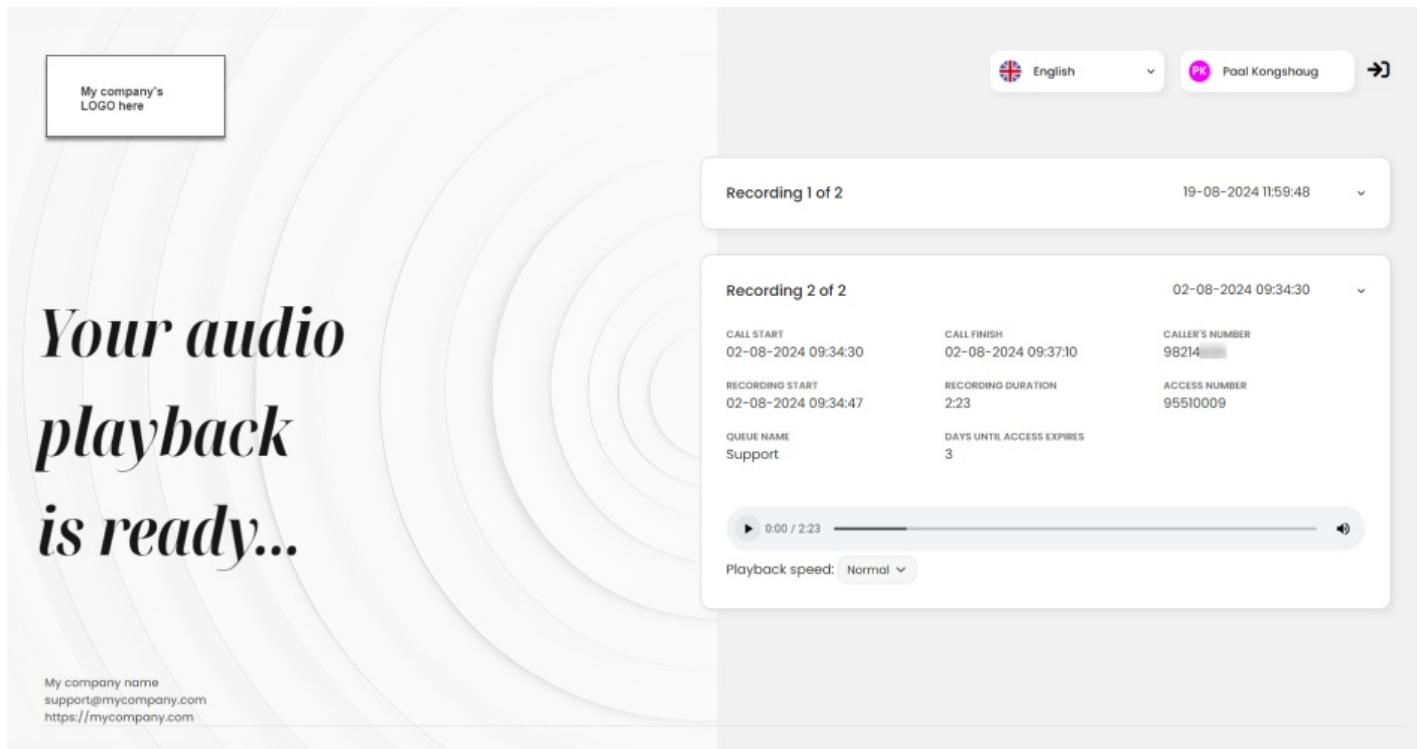
When **Request one-time code** is clicked, we send an email to the intended recipient (for this unique URL) with a 6 digit OTC and we update the page and ask for the OTC to be entered. The OTC generated is valid for 10 minutes.

The recipient enters the OTC on the page, and if correct, we present the **Terms of use** (as defined by you).

If the Terms of use is accepted, the user will get access to the call recordings intended for this email address for this Puzzel solution (customer key).

If the email containing the unique link (behind '[link](#)') intended for person/email address A for some reason is forwarded to another person (B), and this person (B) requests an OTC on this URL, the OTC will be sent to the intended user's email (A), so B will not be able to get access.

There might be multiple recordings and/or chat logs available for this user.



In this example there are 2 recordings available. If only 1 call recording is available, we show this call's details expanded, and if more than 1 recording is available, all will be shown collapsed, so that the user can expand and play the ones he wish.

The recipient can only sign in and access the call recording(s) for the **defined number of days**, and there is no download option on the Playback page. (right-clicking on the player does not show any options)

If a recipient (an email address) has received an email with access to e.g. 2 call recordings for e.g. 7 days, and then within 7 days the recipient gets another email (from an admin user on the same Puzzel customer key) with access to e.g. 1 new recording for 7 days, then the recipient will have access to all these files on the same link/page, but the files will be deleted from this external storage when they should no longer be available.

The **Queue name** and **Access number** is shown only if you ticked to include them in the modal.

When the user clicks *Play* on a call recording on the Playback page (or opens a chat log), we generate a record for the *Archive - Audit logpage*, so that you can see if and how many times these recordings are actually played.

Archive - External access page

Archive users with property '*Enable menu Archive - External access*' ON will see this page, that has 2 parts

- **Log:** On this page we show a list of all 'Send link to external user' emails sent
- **Config:** On this page you can configure your Playback page (your logo, footer and your Terms of use)

External Access - Log

On this page you can search to find who sent what links giving access to call recordings or chats.

Log Config

Log for External access given

Select Time Period
 Last week (12/08/2024-18/08/2024)

Type

Recipient's name

Ordered by

Recipient's email

Search result

Date and time	Ordered by	Recipient's name	Recipient's email	Reason	Message sent	Days access	Language	Call recording(s)	Caller's number	Status
16-08-2024 16:43	Paal Kongshaug (Paal)			Test	Dear James Bond. H...	7	en	2380519090475102532	9821	Valid / Click to cancel
15-08-2024 12:24	Paal Kongshaug (paal_dk)			Test med secret	1 samtale fra 25/4-2...	7	no	1402682630475102221	<secret>	Access has expired
15-08-2024 12:17	Paal Kongshaug (paal_dk)			Test med secret	Language = Finnish ...	3	fi	1388667380475105603	003598	Access has expired
15-08-2024 12:16	Paal Kongshaug (paal_dk)			Test med secret	Language = Swedish ...	3	se	1388442630475107310	003598	Access has expired
15-08-2024 12:13	Paal Kongshaug (paal_dk)			Test med dansk	Selected language = ...	7	da	1515400830475101282	982	Access has expired
14-08-2024 13:50	Paal Kongshaug (paal)			Test chats	Dear Paal Kongshaug...	7	no	1872033680060382162	kate@test.dev	Access has expired

You can see the status of each secure link sent, that is, if it's still **valid** or if it has **expired**. If a link (access given) has expired, the recording file(s) are deleted from the storage.

If a link was sent by mistake to the wrong email address or the wrong recording was sent to an email (and it's still **Valid**), you can click **Cancel** to remove this access given. If this is done, you get a warning and is asked to confirm, and if you confirm, the recording(s) are removed from and link is no longer giving access. In the *Status* column we now show 'Cancelled by <user> on dd.mm.yyyy hh:mm'

External Access - Config

Log Config

External Playback page configuration parameters

Logo

Footer on web page (1-3 lines)
 My company name
 support@mycompany.com
 https://mycompany.com

Web session time to live, in hours (1-24)

Terms of use - English
 The recording file(s) you have been given time limited access to is intended for you. You are not allowed to download, save, forward or share the file(s) through any medium/platform.

Terms of use - Norwegian
 Opptaksfilen(e) du har fått tidsbegrenset tilgang til er ment for deg, og du har ikke lov til å lagre eller distribuere dem uten vårt samtykke.

Terms of use - Danish
 Den eller de opkaldsoptagelsesfil(er), du har fået tidsbegrænset adgang til, er beregnet til dig, og du må ikke gemme eller distribuere dem uden vores samtykke

Terms of use - Swedish
 Den eller de samtalsinspelningsfiler du har fått tidsbegränsad tillgång till är avsedd för dig, och du får inte lagra eller distribuera dem utan vårt medgivande.

The config parameters for the Playback page are:

- Logo (upload you company's logo)
- Footer (max 3 lines of text, intended for your company's contact details)

- Terms of use (your version of Terms of use in the different languages). Only languages that have Terms of use are possible to select by the admin user that sends a link.
- **Session time to live** (How long a user can play the recording after correct OTC is entered, e.g. 2 hours. When the web session has ended, the user can click on the link in the email once more and ask for a new OTC to sign in again)

Please upload your logo, add a footer text and adjust the Terms of use.

Send link to recordings to another Puzzel Archive user ('internal')

If you want another Archive user to listen to a call recording in the Archive, you can tell the other user to find the call by entering the call's call_id (which can be found at the bottom of this call's General information, but if you want someone to listen to e.g. 5 calls, this approach is not very effective.

If you need to ask another Archive user to listen to several call recordings (or study several chats), you can select/tick these calls (chats) from the result set and then select action "**Send link to internal users**", to open this modal:

Send link by email to internal user to selected recording(s)

Please note that the recipient user must be signed in to Admin Portal and have access to Archive and the selected calls to be able to utilise the link you send.

The Recipient

Username

Email address

Message to recipient

This email is intended for {{recipient}}.

Here are some call recordings (or chats) I want you to take a look at.

Please note that you must be signed in to Puzzel Admin Portal for the link to work and show the relevant calls (or chats) in the Archive. You will only be able to play the recordings (or see the chatlogs) if you have Archive access and no resource filter that prevents your access to the relevant queues or agents:

{{link}}

Best regards,
{{myname}}

Email subject:

Sender: no-reply@puzzel.com

Send email

In the modal, you...

- select the **recipient user** (and adjust the selected user's email address if it's wrong)
- adjust the pre-populated **message**/email body if needed, but don't remove "{{link}}", and we recommend you also keep "{{recipient}}" and "{{myname}}"
 - The prepopulated text is fetched from the Recording property "Send link to recording(s) – Email Body (Internal)"
- adjust the **Email subject** if needed
- click *Send email*

The prepopulated *Subject* and *Sender* is fetched from the same properties as is used for *Send link to external user*

When *Send email* is clicked, an email is sent to the recipient user, and this email contains a link to the relevant call

recordings in the Archive.

The link only works for a Puzzel user that is already signed in to Puzzel Admin Portal and has access to the Archive. The recipient will see all the relevant calls (chats) unless this user has a resource filter assigned that does not include all the relevant queues/user groups.

If the recipient plays one of the recordings in this list of calls (or opens a chat log), this generates a record for the Archive Audit log.

To send such a link to another Archive user does not generate a record to the log on page Archive - External access - Log.