



Puzzel Contact Centre Solution. Administration Portal User Guide.

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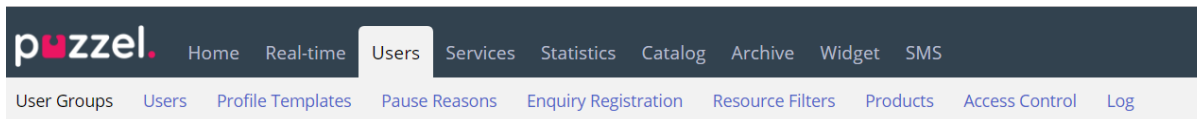
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1 Quick Start / Overview

Sign in to Puzzel Administration Portal here: <https://admin.puzzel.com>

The Administration Portal has various tabs each containing sub-menus that give you access to different functionality. For example, this is what it looks like when tab *Users* is selected:



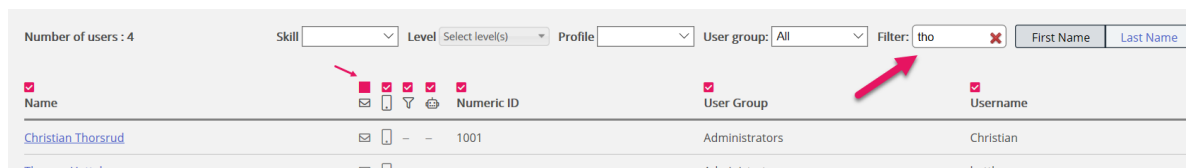
Not all customers/users have access to all functionality, so you may see tabs or sub-menus that are disabled. If you are interested in functionality that you do not have access to, please contact Puzzel support.

Tab	Short description
Home Page	Information published by Puzzel, traffic so far today and KPI-values.
Real-Time	Overview of live status on queues and agents, Ticker (traffic so far today per queue and agent) and Wallboard.
Users	Manage user groups and users, defines profiles, create Pause reasons and Enquiry registration categories, create Resource filters and configure Products.
Services	Manage opening hours, sound files, lists, service variables, KPI alarms, queue parameters, Dialler campaigns, Call Flows, Social media channels, Chat and Agent Assist, and do Silent monitoring.
Statistics	See standard statistic reports, customise reports, and configure what reports to be sent to which recipients at what time intervals (Report subscriptions).
Catalog	See catalog content and configure fields, departments and mappings.
Archive	Search for and analyse calls, recordings and chat logs, and see the Audit log.
Widget	For configuring tabs and widgets in the agent application
SMS	For configuring SMS services like Survey.

Online help is available behind the question marks on all pages.

Many pages have a **filter** field in the upper right side. If you write something in the filter field, only rows that contain the written text will be shown. If you uncheck a column when filtering, only rows with the written text in a checked column will be shown.

Example: Show rows (users) that contain `tho` in any field except email-address:



The screenshot shows a user management interface. At the top, there are several dropdown menus: 'Skill', 'Level' (with 'Select level(s)' below it), 'Profile', and 'User group' (set to 'All'). To the right is a 'Filter:' field containing the text 'tho' with a red 'X' icon to its right. Further right are two buttons: 'First Name' and 'Last Name'. Below these is a table with columns: 'Name', 'Numeric ID', 'User Group', and 'Username'. The 'Name' column header has a red arrow pointing to it. The 'Filter:' field also has a red arrow pointing to it. The table contains two rows: 'Christian Thorsrud' and 'Thomas Hatteberg'. The 'Name' column has a red checkmark icon next to it.

Name	Numeric ID	User Group	Username
Christian Thorsrud	1001	Administrators	Christian
Thomas Hatteberg		Administrators	hatthom

Please note that a search for e.g. `pa ko` returns rows containing `pa` OR `ko`, while a search for `"pa ko"` returns rows containing the whole string within the quotation marks.

On many pages you can sort the content in tables by clicking on a column heading.

2 About Puzzel Administration Portal

Puzzel is a flexible customer contact and switchboard solution based on cloud technology. Puzzel is a multi-channel solution which handles telephone, chat, e-mail, SMS and social networks requests.

Puzzel Administration Portal gives administrators and supervisors the tool they need to gain better control of their day-to-day operations.

In Puzzel Administration Portal you can:

- *Access detailed historical statistics reports*
- *Define and build customised reports and wallboards*
- *Monitor contact centre activity in real-time*
- *Change agent profiles and provision new agents instantly*
- *Set opening hours and holiday routing*
- *Manage audio and IVR catalogue*
- *Configure queue parameters, KPIs, enquiry registration categories etc*
- *Do Silent Monitoring on agents*
- *Find and analyse calls/recordings/chats/emails in the Archive*
- *Manage outbound Dialler campaigns*
- *See and maintain your service configuration(s) in Call Flow Tool*
- *Configure tabs and widgets for the Agent application*
- *Configure/connect Social media accounts/pages to Puzzel*
- *Configure settings for web-chat to be used on your web pages*
- *Manage Agent Assist contact list and Knowledgebase*

In this guide, most of the available functionality in Puzzel Administration Portal is described. Your company has a customised access to the system and may not have access to every function described.

Puzzel Administration Portal is web-based and requires a PC with internet access and a web browser.

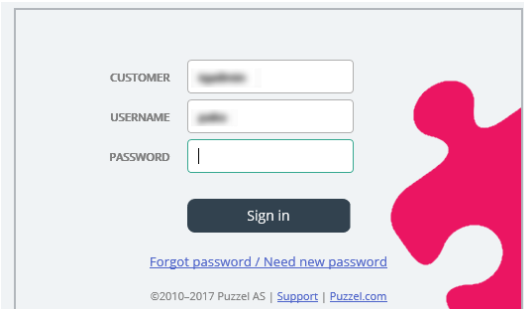
Details on supported browsers can be found in “Puzzel Contact Centre - Basic requirements” on help.puzzel.com.

Puzzel Administration Portal’s main features are available on tablets, for example iPads.

In addition, a Puzzel App is available in Google Play and Apple’s App Store.

3 Sign in and password

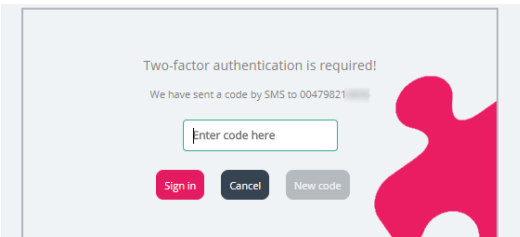
As an administrator or supervisor user, go to <https://admin.puzzel.com> and enter your Customer number, Username and Password.



A screenshot of the sign-in form. It features three input fields: 'CUSTOMER' (with a blurred value), 'USERNAME' (with a blurred value), and 'PASSWORD' (with a single character visible). Below the fields is a dark 'Sign in' button. A blue link reads 'Forgot password / Need new password'. At the bottom, it says '©2010–2017 Puzzel AS | [Support](#) | [Puzzel.com](#)'. A large red puzzle piece graphic is on the right side.

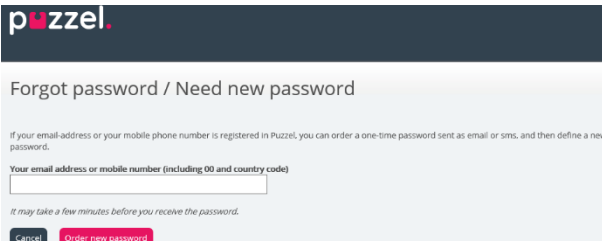
If incorrect password is entered 4 times in a row, the user account will be blocked. The user can re-open the account by ordering a one-time password (by email/SMS) and define a new password.

If **two-factor authentication** is configured for a user, the user will receive a code by SMS or email after having entered the correct password. Two-factor authentication is supported in admin.puzzel.com, agent.puzzel.com and in the Puzzel app.



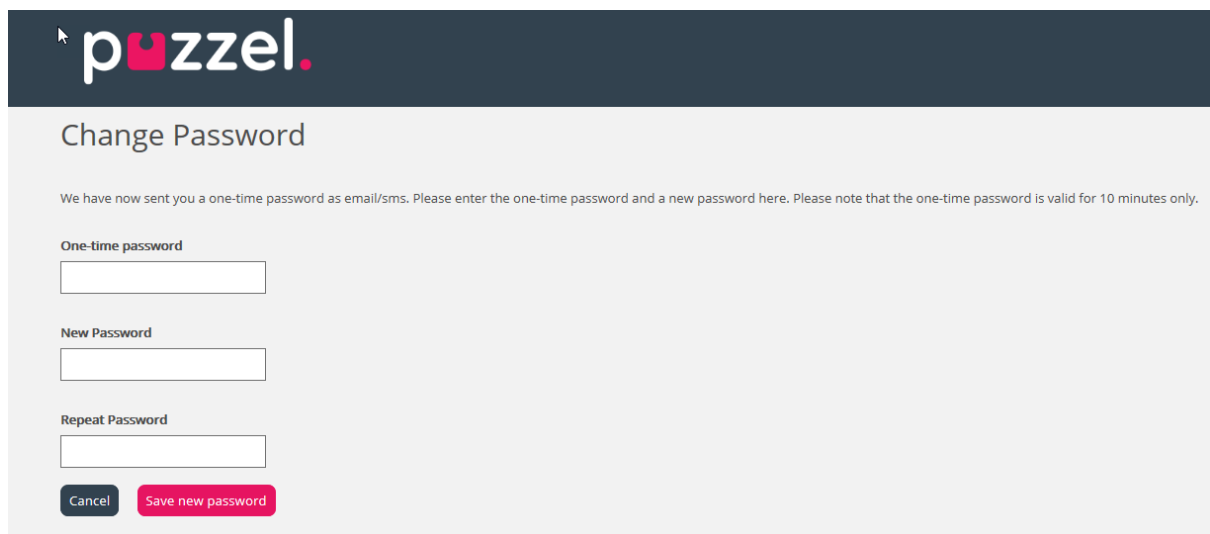
A screenshot of the two-factor authentication screen. It displays the message 'Two-factor authentication is required!' and 'We have sent a code by SMS to 00479821'. Below this is an input field labeled 'Enter code here'. At the bottom, there are three buttons: 'Sign in' (red), 'Cancel' (dark grey), and 'New code' (light grey). A large red puzzle piece graphic is on the right side.

In case you forget your password, or it has expired, you can create a new password by clicking the *Forgot password/Need new password* link. Once you clicked the link, you will be transferred to a new page where you will be asked to enter your email address or mobile phone number to order a one-time password.



A screenshot of the 'Forgot password / Need new password' page. It features the Puzzel logo at the top. Below the title, it says 'If your email address or your mobile phone number is registered in Puzzel, you can order a one-time password sent as email or sms, and then define a new password.' There is an input field for 'Your email address or mobile number (including 00 and country code)'. Below the field, it says 'It may take a few minutes before you receive the password.' At the bottom, there are two buttons: 'Cancel' (dark grey) and 'Order new password' (red).

If the entered email address or mobile number is registered on a Puzzel user account, Puzzel will send a one-time password by email/SMS and transfer you to a new page where you can use the one-time password to create a new permanent password.



puzzel.

Change Password

We have now sent you a one-time password as email/sms. Please enter the one-time password and a new password here. Please note that the one-time password is valid for 10 minutes only.

One-time password

New Password

Repeat Password

A one-time password is valid for 10 minutes only. If incorrect one-time password is entered 4 times, it is no longer valid.

If you do not receive the one-time password by SMS within a short time, you can order a new one-time password. If you entered your email address and you don't find the email with the one-time password in your inbox, please take a look in your spam folder.

A new password must be at least 6 characters and contain at least one letter and one digit (unless *Strong password* is configured).

Single-Sign-On to Puzzel agent application using Azure.

If your company's users have Microsoft **Azure** accounts, the users can sign in to Puzzel's **agent** application without entering Puzzel customer number, username and password.

Before users can use such Single-Sign-On to Puzzel's **agent** application;

1. Azure must be added as an "external authentication provider" on page Users – Products under Sign in to Puzzel.
2. You need to upload a file with the agents' Puzzel user_id and the corresponding Azure id, which (usually) is the user's email address.

A Puzzel user with a defined Azure id (external_id in Puzzel) can use <https://agent.puzzel.com?connection=azure> to sign in to Puzzel's agent application without entering Puzzel username and password.

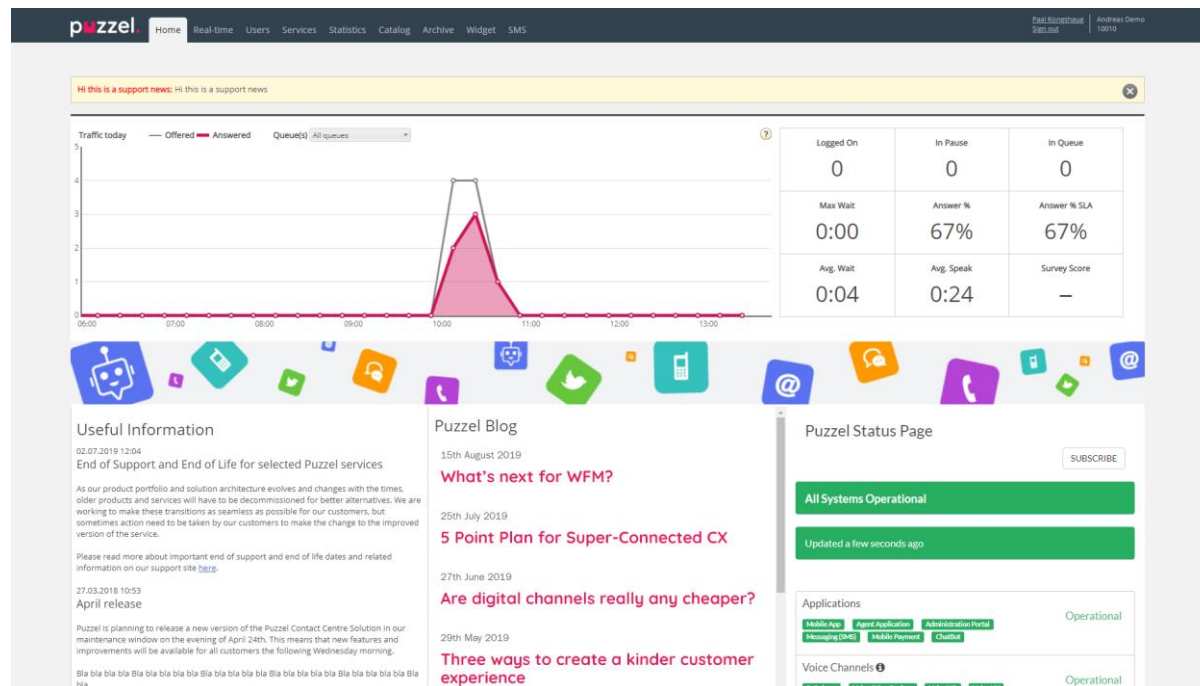
If you do not allow such SSO agents to sign in to agent.puzzel.com with Puzzel username and password, please turn ON property *Reject user to sign in with Puzzel username*.

Please note that we do not support Single-Sign-On to <https://admin.puzzel.com>

4 Home Page

Once you have signed in, you will see the *Home Page*, which is divided into 3 sections: Support Message, Traffic Information/KPIs and Useful Information.

At the top right of the window your username, customer name and customer number are displayed.



On top of the Home Page in the yellow box, you can see Support News (only visible if a message is published). If you (or other users) do not want to see Puzzel Support messages, you can configure this under *Users – Products - Homepage*.

If you click *Read More* the yellow message box window will expand. To make the message small again, just reload the page again by clicking the *Home Page* tab. Please note if you click the 'X' you will not see this particular Support message again. However, once Puzzel publishes a new Support message, the yellow message box will appear again.

In the chart you can see the number of requests offered per queue and answered, per quarter of an hour so far today, for selected display queue(s). On the right side of the chart you can see values for 4-9 key parameters for the same display queue(s). You can configure what key parameters are shown under *Users – Products – Homepage*.

Available parameters to choose from are *Answer % so far*, *Answer % within SLA so far*, *Avg. Speaktime so far*, *Avg. Wait Time Answered so far*, *In Pause now*, *In Queue now*,

Logged on now, Max Wait Time Now, Silent calls so far, Survey score, Total Answered so far and Total Offered so far.

By clicking the drop-down menu for Queue(s) you configure if the graph and the key parameters represent just one display queue or multiple queues.

Please note that an incoming request is counted as being offered to queue as soon as it arrives in queue, and as answered only when an agent has answered the call / accepted the written request. This means that there may be time periods where the number of answered requests is greater than the number of offered requests.

On the bottom part of the Home Page, Puzzel publishes useful information and product news.

5 Real-time

The Real-time tab provides an overview of live status updates on queues and agents.

5.1 Queue Overview

The queue overview enables you to monitor both agents and queues in your contact centre, per display queue. (See [Display Queue Settings](#)). The page refreshes automatically.

Queue Name	Total in Queue	Callback	Preferred	Scheduled	SLA Score	Max Wait Time	Agents Logged on	Agents in Pause	Agent
Chat	0	0	0	0	0	0:00	0	0	Agent
Facebook	0	0	0	0	0	0:00	0	0	Agent
Sales	0	0	0	0	0	0:00	0	0	Agent
Support	1	0	0	0	120	0:24	1	0	Agent
Switchboard	0	0	0	0	0	0:00	0	0	Agent
Twitter	0	0	0	0	0	0:00	0	0	Agent

- **Total in queue:** Total number of requests currently queued (in this Display queue)
- **Callback:** Number of requests in queue that are callbacks
- **Preferred:** Number of requests in queue that are have a reserved/preferred agent
- **Scheduled:** Number of scheduled calls/tasks that have not yet reached the scheduled time. Aka the “waiting room”. (The column is only shown if Queue property “Show in Queue overview: Scheduled requests” is ON.)
- **SLA score:** How long the queue is relatively speaking.
For details, see [Queue SLA settings](#).
- **Max wait time:** Longest waiting time for a request currently in a queue.
- **Agents logged on:** All agents that are logged on and can answer requests from the queue, including agents that are in status pause.
- **Agents in Pause:** Agents that are in Pause
- **Agent:** Clicking on the Agent link, a new window will open giving more information about agents that are logged on to that queue.

In 3 of the columns you will see hyperlinks to pages with more detailed information:

- By clicking on a number in the Total in queue column, [Queue details](#) opens.
- By clicking on a number in Agents Logged on column, [Agent status](#) opens.
- By clicking on Agent in the Agent column, the [Agent details](#) opens.

5.1.1 KPI Alarm Warnings in Queue Overview

When a [KPI alarm](#) (Key Performance Indicator alarm) is triggered, a warning signal will appear in the Queue Overview and the whole row will turn yellow. KPI Alarms are configured per system queue, but this page shows one row per Display queue. If you click on the warning signal, a new window will pop-up containing a detailed alarm message.

Queue Overview ?

Filter:

Queue Name	Total in Queue	Callback	Preferred	SLA Score	Max Wait Time	Agents Logged on	Agents in Pause	Agent
Chat	0	0	0	0	0:00	0	0	Agent
Facebook	0	0	0	0	0:00	0	0	Agent
Sales	0	0	0	0	0:00	0	0	Agent
Support	0	0	0	0	0:00	0	0	Agent
Switchboard	0	0	0	0	0:00	0	0	Agent
Twitter	0	0	0	0	0:00	0	0	Agent

5.1.2 Queue Details

Queue details shows one row per request in the selected display queue.

Queue Details: Sales ?

Filter:

Number/From	Type	SLA Score	Time in Queue	VIP	Callback	Scheduled call time	Reserved(R) / Preferred(P)	Preview	Select
21490672	-	64	0:16	-	-	-	-	-	<input type="checkbox"/>

This page is updated automatically and contains the following data:

- **Number/from:** Phone number/email address/chatter's id.
- **Type:** A request (e.g. a web callback) can be given a category and a description. The category can be a colour. The request's category (if any) will be show here.
- **SLA Score:** Shows how long the request has waited in this queue, relatively speaking
- **Time in queue:** How long time the request has been in queue

- **Callback**
 - ‘ ‘: Normal request
 - 1, 2, 3: Callback for the 1st, 2nd or 3rd time
- **Scheduled time:** The scheduled time for the call/task.
- **VIP:** If a caller is categorised as a VIP
- **Reserved/Preferred Agent:** If the call/email/chat has a reserved/preferred agent.

If you have access to **delete** (callback/email) requests from queue, you will see columns *Preview* and *Delete*. Max. 100 requests can be deleted from queue at the same time.

5.1.2.1 About callback in queue

A customer calling in can be offered callback when he arrives in queue and the [estimated wait time](#) now is longer than e.g. 3 minutes. If the customer presses x to order callback, he will keep his position in this queue. When the customer is first in queue, an agent is called, and then the customer is called.

- If the call is answered by the customer's **voicemail**, a new call will not be done.
- If the call is **not answered** by the customer, the default is that no more calls will be done (1 attempt only).
 - If 2 or 3 attempts is configured, a customer who doesn't answer is put at the end of the queue, and he will be called when he's first in queue.

If 2 or 3 callback attempts is configured, a “**quarantine**” (=time from an unanswered callback until the customer is put back into the queue) can be configured, e.g. 1 minute. This quarantine is to prevent doing the 2nd callback a very short time after the 1st call in the special case that the queue is now very short. If you only offer callback when the estimated wait time is quite long, the wait time is probably still quite long when the callback is done, so a quarantine is usually not needed.

For a customer waiting for the 2nd or 3rd callback, we show the customer's “**gross**” wait time in Queue details, but when calculating the request's SLA score, we use the “**net**” wait time (time since it was put back into queue after the previous callback attempt). It's also possible to add a VIPscore to a customer that didn't answer a callback to give priority (after the quarantine time) for the next callback.

A callback can stay in queue for **max 48 hours**, which means that if agents leave in the evening before all callbacks are done, the callbacks are still waiting in queue the next morning, unless the administrator has deleted them from the queue.

To put a callback into another queue than the queue the caller ordered callback from is possible, but **not recommended**. The main reasons are:

- The customer will not keep his place in queue. The customer is called when an agent (in a short or in a very long time) gets the call from this callback queue.
 - What to announce to the caller when he orders callback?
 - How to make sure agents get the callbacks within a reasonable time?
- Statistics, Ticker, Archive and Raw data will become **confusing**. 1 incoming call from the customer is reported as arriving in queue X where he interrupted (left the queue), and then 1 new incoming call to another queue, that ordered callback.

5.1.3 Agent Status

Click on a number in column *Agents Logged on* in Queue overview to see *Agent status*:

Name	Phone Number	Status
Paal Agent	Softphone	🟢 Connected (Sales)
John Doe	21490547	🟡 Pause (Administration)
Paal Admin	12345678	🟡 Pause (Meeting)

For agents in status Connected we show the queue in brackets, unless the caller is put on hold, the agent is in a consult call or agent-to-agent call, or if this is an outbound call where the called party has not yet answered.

5.1.4 Agent Details

Click on *Agent* in the Agent column in Queue overview to open the Agent details page.

Overview of Agents: 1. Sales

Ready	Connecting	Connected	Busy	Wrap-up	No answer	Pause	Logged off
1	0	1	0	0	0	2	4

Agent Details: 1. Sales

Name	Phone Number	Skills	Status	Status Duration	Change Status
Andrea	98765	All Queues	🟢 Ready (0)	1:10	Log off Set Pause
Paal Sal	Softphone	All inbound queues	🟢 Connected (0) (1. Sales)	0:21	Log off Set Pause
Ronald	1234	Sales	🟡 Pause (0) (Administration)	2:48	Log off Set Ready Change pause
Stefan I	086	Sales	🟡 Pause (0) (Break)	2:18	Log off Set Ready Change pause
Andrea	Softphone	Chat	🟡 Logged off (0)	15d 14:29:13	Log on
Paal Ko	Softphone	Sales	🟡 Logged off (0)	49d 01:03:12	Log on
Paal Su	Softphone	All queues	🟡 Logged off (0)	99d 03:46:46	Log on
support	Softphone	Backoffice	🟡 Logged off (0)	36d 02:21:02	Log on

The page is divided into 2 parts:

- **Overview of agents:** Shows the number of agents per [status](#). If your solution includes any group numbers, they are shown in separate rows.
- **Agent details:** A list with information about each agent in the chosen queue. In the Change status column, you can log agents on/off and change their pause type. Rows (agents) that are in grey represent agents who have been logged on to this queue earlier.

Name	Phone Number	Skills	Status	Status Duration	Change Status
Andrea	987	All Queues	Ready (0)	4:31	Log off Set Pause
Paal Sa	Softphone	All inbound queues	Ready (0)	0:58	Log off Set Pause
Ronald	12345	Sales	Pause (0) (Administration)	6:09	Log off Set Ready Change pause
Stefan	086	Sales	Pause (0) (Break)		Log off Set Ready Change pause
Andrea	Softphone	Chat	Logged off (0)		Log on
Paal Ko	Softphone	Sales	Logged off (0)		Log on
Paal Su	Softphone	All queues	Logged off (0)		Log on
support	Softphone	Back-office	Logged off (0)		Log on

For agents in status *Connected* we also show the **queue name** in brackets, unless the caller is put on hold, the agent is in a consult call or an agent-to-agent call, or if this is an outbound call where the called party has not yet answered.

By clicking on an agent’s name, this agent’s Ticker is opened.

Status duration and written requests

An agent who can answer written requests in Puzzel will be shown with status *Ready (N)* or *Busy (N)* when having N active written requests and no active call. The value for *Block phone if > x written requests* decides when status changes from *Ready* to *Busy*. Please note that *Status duration* is not reset on this page when an agent changes from *Ready (x)* to *Ready (y)* or from *Busy (x)* to *Busy (y)*, so you can’t always tell when the agent last time received or finished a written request. However, when allocating calls and written requests to agents, we keep track of when agents received/finished the last request.

5.1.5 Scheduled callbacks/calls and Scheduled tasks

If scheduled callback is offered to your end-customers (ordered from a web page), if your agents can Schedule calls from the agent application, or if agents use Schedule tasks, a column called *Scheduled* can be shown in the Queue overview (*Users – Products – Queue: Show Scheduled requests*).

When a scheduled call/callback/task is ordered (e.g. at 08:58) with a scheduled time (e.g. 12:00), this call/task is put in the queue’s “waiting room” and is shown in column *Scheduled* until the scheduled time, and then it’s moved into queue and shown as in queue.

A scheduled call’s/task’s presented wait time and SLA score starts at 0 when it appears in Queue details, but when allocating agents, the time since it was ordered is used to calculate SLA score to make sure it is prioritised at the scheduled time.

The scheduled time can be max 14 days in the future for calls, and max 60 days in the future for tasks. The default max number of requests in a queue’s “waiting room” is 1000.

If you click on a number in column *Scheduled* in the Queue overview, the page *Scheduled requests* is shown. Here we show one row per request currently in this queue’s “waiting room”.

Home » Real-time » Queue Overview » Scheduled requests:
Scheduled requests: STask - Sales

Number/From	Type	Created	Scheduled time	Reserved/Preferred Agent	Select
Tom Waits	Follow up call	02.01.2020 15:10:53	02.01.2020 15:30:00	(R) Paal Sales Agent	<input type="checkbox"/>
Nils Nilsen	Skriv tilbud	02.01.2020 14:57:20	03.01.2020 09:00:00	(R) Paal Sales Agent	<input type="checkbox"/>

Delete

A scheduled call/task appears on the Queue details page at the scheduled time (since it’s then moved from the “waiting room” into the queue), and you can see the request here the relatively short time it waits in queue before the call/task is accepted by agent.

Home » Real-time » Queue Overview » STask - Sales
Queue Details: STask - Sales

Number/From	Type	SLA Score	Time in Queue	VIP	Callback	Scheduled time	Reserved/Preferred Agent	Preview	Select
Prospect(Truls Trulsen)		-	19:05	-	-	02.01.2020 15:00:00	(P) Paal Sales Agent	Preview	<input type="checkbox"/>

Delete

5.2 User Groups

Under *Real-time – User Groups* you can see number of agents per status per user group.

User Group	Ready	Connecting	Connected	Busy	Wrap-up	No Answer	Pause	Logged Off
Administrators	1	0	0	0	0	0	1	33
Sales	0	0	0	0	0	0	0	2
Support	0	0	0	0	0	0	0	2
Switchboard	0	0	0	0	0	0	0	2

By clicking on a hyperlink in the *User Group* column, you will see all the agents that belong to the selected user group, their status and the profile they now are using.

Agent	Phone Number	Profile	Status	Time in Status	Change Status
sal	12345	Sales	🛑 Pause (Break)	1:16	Log off Set Ready
sal	55555	All inbound queues	🛑 Pause (0) (Administration)	0:53	Log off Set Ready
Pa	Softphone	Sales	🟢 Ready	0:19	Log off Set Pause

By clicking a hyperlink in the *Profile* column, the skills for this profile are shown. In the *Change Status* column, you can log agents on/off. Click on an Agents' name to show his [Ticker agent](#).

5.3 Ticker Services

Shows in real time the total number of requests offered to (=received) and answered per access point.

Access Point	Description	Total Offered	Total Answered	Answer Rate
21492979		0	0	–
21896379	Dialler	0	0	–
chat_10010_q_chat_sales		0	0	–
dev.10010@demopuzzel.com		0	0	–
SC_11838_Facebook_Facebook		0	0	–
SoMe_1450690341887287_Facebook!Public_Facebook	Dev 10010	0	0	–
Total		0	0	–

You can toggle between *Day* and *Week* view. Day view shows values so far this day (starting midnight), while Week view shows values so far this week (starting midnight between Sunday and Monday).

Please note that:

- **agent-to-agent** calls are not included in Ticker Service since such calls are not requests to an access number.
- Scheduled tasks are reported as *Offered* when they are created, and as *Answered* when agent accepted the request, and this might be several days apart.

5.4 Ticker Queues

Ticker Queues is a Ticker for the different display queues in Puzzel. Here you can see the number of offered requests per display queue (=arrived in queue) and number of answered requests, answer rate and answer rate within SLA, and average wait time, speak time, wrap-up time and AHT (Average Handling Time) so far today/this week.

The screenshot shows the 'Ticker Queues' page in the Puzzel administration portal. The page has a dark navigation bar with 'puzzel.' logo and menu items like Home, Real-time, Users, Services, Statistics, Catalog, Archive, Widget, SMS. The user is logged in as Paal Kongshaug (Andreas Demo 10010). The main content area shows a breadcrumb 'Home » Real-time » Ticker Queues' and a title 'Ticker Queues' with a help icon. Below the title is a filter section with a 'Filter table...' input and 'day' and 'week' buttons. The table below has the following data:

Queue	Total Offered	Total Answered	Avg. Survey Score	Answer Rate	Answer Rate SLA	Avg. Wait Time	Avg. Speak Time	Avg. Wrap-up	AHT
Chat	0	0	-	-	-	0:00	0:00	0:00	0:00
E-mail	0	0	-	-	-	0:00	0:00	0:00	0:00
Facebook	0	0	-	-	-	0:00	0:00	0:00	0:00
Sales	0	0	-	-	-	0:00	0:00	0:00	0:00
Support	1	1	-	100%	0%	0:44	0:19	0:10	0:29
Switchboard	0	0	-	-	-	0:00	0:00	0:00	0:00
Twitter	0	0	-	-	-	0:00	0:00	0:00	0:00

Columns:

- **Total offered:** Number of requests offered to (arrived in) the display queue so far.
- **Total answered:** Number of requests answered so far.
- **Avg. Survey score:** Avg. survey score so far, shown if configured*
- **Answer rate:** Total answered / Total offered.

- **Answer rate SLA:** The number of requests answered within the defined SLA, relative to Total offered. If Alternative SLA is defined for a queue, this value is used instead of SLA.
- **Avg. wait time:** Average wait time for requests answered by agents. Please note that for a caller that ordered callback, the time until the first agent answers is included in the calculation, even if the callback is not answered on the 1st, 2nd or the 3rd attempt. This differs a bit from Avg. wait time in statistics report Details per queue.
- **Avg. speak time:** Average speak time (connected time) by agents on this queue. Please note that if more than 1 callback attempt is configured, there may be 2 or 3 answered agent calls (all with speak time) for 1 callback customer! This differs a bit from Avg. wait time in statistics report Details per queue.
- **Avg. Wrap-up:** Average wrap-up time by agents on this queue. Please note that if more than 1 callback attempt is configured, there may be 2 or 3 answered calls to agents (all with wrap-up time) for 1 callback customer!
- **AHT:** Avg. speak time + Avg. Wrap-up

* The column **Avg. Survey score** is only shown if the Queue property *Show Survey score on queue level* is ON. Both SMS Survey scores for phone queues and Chat Survey scores are shown. If a customer started a chat on queue x with agent 1, and agent 1 invited (any agent on) queue y, this chat's survey score is reported on queue x.

Scheduled callbacks ordered from a web page, agents' Scheduled calls and agents' Scheduled tasks are counted as offered to queue when they are put in queue at the scheduled time.

Please note that the numbers here **may differ a bit from the numbers in the queue reports in Statistics**, primarily due to small differences in how **callback** in queue is treated. In addition, if you have a Display queue consisting of 2 or more System queues (see [Display Queue Settings](#)), the numbers in Ticker Queue might be different than in Statistics (and Archive), since we group by system queue in Statistics (and in Archive).

Agent-to-agent calls are not shown here since they are not linked to a queue.

There may be more requests *answered* than *received* for a queue on a daily/weekly basis since e.g. emails, tasks and callbacks can stay in queue over midnight. Due to this, the Answer rate can be greater than 100%

5.5 Ticker User Group

Ticker User Groups shows statistics per user group and agent, so far today/this week.

The screenshot shows the 'Ticker User Groups' page in the Puzzel administration portal. The page has a dark navigation bar with the Puzzel logo and menu items like 'Home', 'Real-time', 'Users', 'Services', 'Statistics', 'Catalog', 'Archive', 'Widget', and 'SMS'. Below the navigation bar, there are tabs for 'Queue Overview', 'User Groups', 'Ticker Services', 'Ticker Queues', 'Ticker User Groups' (which is active), 'Ongoing Requests', and 'Wallboard'. The main content area shows a breadcrumb trail 'Home » Real-time » Ticker User Groups' and a title 'User Groups' with a help icon. A filter section includes a 'Filter table...' input and buttons for 'day' and 'week'. Below this is a table with the following data:

Name	Total Offered	Total Answered	Avg. Survey Score	Answer Rate	Avg. Speak Time	Avg. Wrap-up	AHT	Time Logged On	Time in Pause
Administrators	2	1	–	50%	0:19	0:10	0:29	13:07	0:00
Sales	0	0	–	–	0:00	0:00	0:00	0:00	0:00
Support	0	0	–	–	0:00	0:00	0:00	0:00	0:00
Switchboard	0	0	–	–	0:00	0:00	0:00	0:00	0:00
Test-Agents	0	0	–	–	0:00	0:00	0:00	0:00	0:00
Wallboard	0	0	–	–	0:00	0:00	0:00	0:00	0:00
All Agents	2	1	–	50%	(average 0:19)	(average 0:10)	(average 0:29)	(average 2:11)	(average 0:00)

The information shown so far today/this week is:

- **Total Offered:** The number of requests offered to the agents per user group.
- **Total Answered:** The number of requests answered by the agents.
- **Avg. Survey score:** Avg. score so far, shown if configured*
- **Answer Rate:** Total answered * 100 / Total offered
- **Avg. Speak Time:** Average speak time for requests answered by agents so far
- **Avg. Wrap-up Time:** Average wrap-up time for requests answered by agents so far
- **AHT:** Average Handling Time so far (=avg. speak time + avg. wrap-up time)
- **Time Logged on:** Total time logged on including time in Pause
- **Time in Pause:** Total time in Pause.

* The column **Average Survey score** is shown only if property *Show Survey score in Ticker Agent/User group* is ON. If a customer started a chat with agent 1 and this agent invites another agent into the chat (to consult and/or transfer), the Survey record will be linked to and reported on the last connected agent.

By clicking on a user group name in Ticker User group, Ticker information for the agents in the chosen user group will appear.

Name	Total Offered	Total Answered	Avg. Survey Score	Answer Rate	Avg. Speak Time	Avg. Wrap-up	AHT	Time Logged On	Time in Pause
Paal	1	1	-	100%	1:14	1:30	2:44	20:10	0:00
S	0	0	-	-	0:00	0:00	0:00	18:33	18:26
S	0	0	-	-	0:00	0:00	0:00	18:59	18:49
Total	1	1	-	100%	(average 1:14)	(average 1:30)	(average 2:44)	(average 19:14)	(average 12:25)

Clicking on one agent's name opens this agent's **Ticker agent**. Ticker agent shows how many requests the chosen agent has been offered and has answered per system queue, in addition to Average speak time, Wrap-up time and Time logged on and in pause, so far today/this week.

Queue	Total Offered	Total Answered	Avg. Survey Score	Answer Rate	Avg. Speak Time	Avg. Wrap-up	AHT
1. Sales	1	1	-	100%	1:14	1:30	2:44
2. Support	0	0	-	-	0:00	0:00	0:00
3. Switchboard	0	0	-	-	0:00	0:00	0:00
Chat Sales	0	0	-	-	0:00	0:00	0:00
DIALER Q1	0	0	-	-	0:00	0:00	0:00

Please note that if one agent calls to another agent, this call is counted as offered and answered on both agents, but unfortunately, such agent-to-agent calls makes the reported *Avg. speaktime* be 0:00 this day in the Ticker. The reported (Avg) speaktime in agent statistics reports will be correct. Also note that **outbound calls** might be shown on the row without a queue name.

5.6 Ongoing requests

This page shows one row per ongoing call and written request. One ongoing request is shown in the system queue it came from. Since agents can have several written requests and/or a phone call ongoing at the same time, some agents may be listed several times here.

Queue	From	Number/From	Duration	Agent	Status	Status Duration
Queue 1	From 1	Number/From 1	2:19:08	Agent 1	Busy (3)	31:40
Queue 2	From 2	Number/From 2	30:02	Agent 2	Connected	30:11
Queue 3	From 3	Number/From 3	1:02	Agent 3	Busy (2)	36:33
Queue 4	From 4	Number/From 4	3:52	Agent 4	Connected	3:52
Queue 5	From 5	Number/From 5	31:32	Agent 5	Busy (3)	31:40

For incoming calls, the request *Duration* will be equal to the agent's *Status duration*.

Some special cases:

- An **agent-to-agent** call will not be listed here (since this is not a *request*).
- When an agent makes a **consult** call, the consult call is not shown in the list
- If an agent has transferred a call to another person, the transferred call is shown as an ongoing request, but without any agent-information.

For emails, chats and social media requests, the request *Duration* will differ from the agent's *Status duration* since agent's can handle multiple written requests (that don't start at the same time), and the agent's phone status may be Connected, Ready or Busy or even Paused/Logged off when having a written request open.

All ongoing requests are shown here for the user unless the user has a resource filter applied that limits what system queues or user groups the user should see.

Delete ongoing requests

A user with access to delete email/callback requests from *Real-time - Queue*, will also be able to delete email and social media ongoing requests from the Ongoing request page, but only if the agent connected to the request is logged off.

If an admin deletes an ongoing request, this will be stored in the *Change log*, and raw data for statistics will be made.

If an agent closes the agent application with an open email/social media request tab, and then signs in to the agent application less than 72/10 hours after they accepted an email/social media request, the request tab will still be there, so that the agent can (finish the work and) close the tab.

Since some agents sometimes close the agent application (and leave) with an email or social media request tab open, the system will automatically delete old requests:

- If an **email** request is connected to an agent for more than **72 hours**, the request will be deleted.
- If a **social media request** is connected to an agent for more than **10 hours**, the request will be deleted.

Ongoing chat.

When agent or chatter has ended the chat, the chat will no longer be shown on page Ongoing requests. If the agent does not close the chat tab **and** the chatter forgets to close chat when it's ended, the chat will be shown as ongoing, but you can't delete the chat request from this page. If the agent closes the Puzzel browser without closing the chat tab, and then signs in to Puzzel within 10 hours, the chat tab will be shown, so that the agent can close it and end the chat request correctly. If the chat tab is not closed by the agent within 10 hours, the chat request will disappear from Ongoing requests, but this chat will not show up in statistics, Archive or Raw data.

5.7 Wallboard

Wallboards are used to show information per display queue and/or agent information on a big screen, so that everyone in a room can have a clear overview. The information in a wallboard is as default updated every 5th second.

We recommend a user group called Wallboard with one user per wallboard you need. This Wallboard user group should only have access to menu *Real-time – Wallboard*, since the ones that know the username/password for wallboard users may not be administrators.

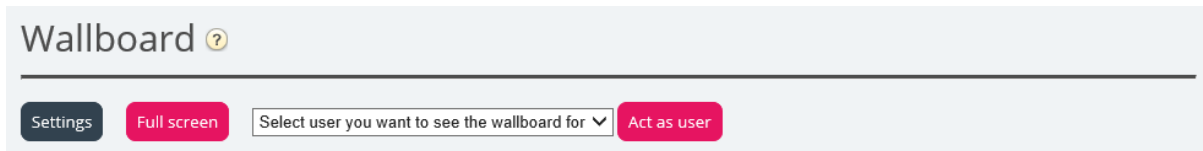
The screenshot shows the 'Wallboard' page in the Puzzel administration portal. The page has a navigation bar with 'Real-time' selected. Below the navigation, there are 'Settings' and 'Full screen' buttons. The main content area features a table with the following data:

Agent	Agent Status	Time in Status	Answered	AHT	Logged on (ex pause)	User Group
Andreas Wallin	Logged off	2d	0	0:00	0:00	Administrators
Christian Thorsrud	Logged off	101d	0	0:00	0:00	Administrators
Jan Rygh	Logged off	151d	0	0:00	0:00	Administrators
Paal Kongshaug	Ready	5:26	1	0:29	14:40	Administrators
Andreas NoAnswer	Logged off	5d	0	0:00	0:00	Administrators
Kristian Halvorsen	Logged off	226d	0	0:00	0:00	Administrators

The interface also includes a 'puzzel.' logo, a timestamp '09:34:52', and a 'POWERED BY puzzel.' footer.

You can sign in with a Wallboard username and configure this user's Wallboard by clicking *Settings*.

A user can deploy Wallboard settings on behalf of other users if *Act as another user (Wallboard)* is on. If you have such access, choose the relevant (Wallboard) user you want to configure a Wallboard for (e.g. Wallboard support), click *Act as user*, and then click *Settings* to configure this user's Wallboard.



To see the wallboard in full screen mode, just click on the *Full screen* button.

puzzel.	In Queue	Max Wait	Logged On	Ready	Offered	Answer %
1. Sales	0	0:00	0	0	5	60%
2. Support	0	0:00	0	0	0	0%
3. Switchboard	0	0:00	0	0	0	0%
Chat Support	0	0:00	0	0	0	0%
Facebook	0	0:00	0	0	0	0%
Email	0	0:00	0	0	2	100%

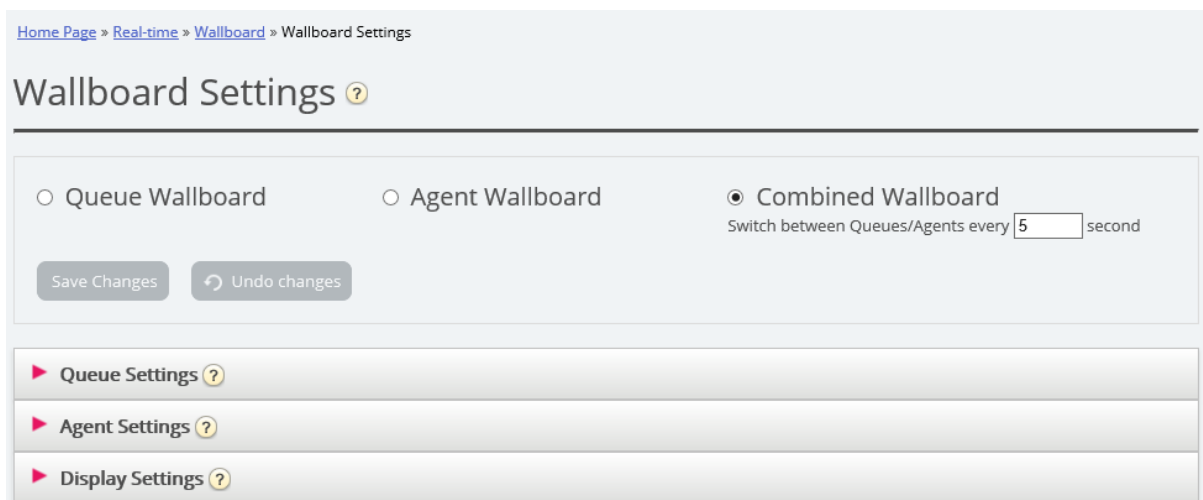
Queue Wallboard

puzzel.	Agent Status	Time in Status	Answered	AHT	Logged on (ex pause)	Time Paused
Andreas EN	Logged off	1:05:03	4	25:39	2:09:50	0:00
Georgi Kostov	Logged off	13d	0	0:00	0:00	0:00
John Doe	Meeting	0:40	1	0:37	49:01	3:20
Paal Agent	Ready	4:14	1	1:02	44:24	1:33:26
Thomas Rødseth	Logged off	6d	0	0:00	0:00	0:00
Børge Astrup	Logged off	8d	0	0:00	0:00	0:00

Agent Wallboard

5.7.1 Wallboard Settings

In the upper part, you choose between Queue Wallboard, Agent Wallboard and Combined Wallboard.



Queue-, Agent- and Display settings are under separate accordions.

5.7.2 Queue Settings

Here you can choose display queues and queue columns that should be shown.

Queue Settings ?

Select Queues 7 selected Show only queues with >0 In queue now

- 1. Sales
- 2. Support
- 3. Switchboard
- 5. E-mail
- 4. Chat
- STask - Sales
- STask - Support

Select Queue Columns 6 selected

↔ In Queue now	↔ Ready now	↔ Connected now	↔ In Pause now	↔ Answered so far	↔ Answer % so far
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Save Changes Undo changes

▶ Agent Settings ?

▶ Display Settings ?

First, choose the display queues you want the wallboard to contain in the *Select Queues* list box. Then, choose which columns to show in the wallboard. Finally, you can move the queues and columns in the order you want (by dragging and dropping) before you save.

If you want to show only the queues with requests waiting in queue now (among the selected queues), then you can tick this option. If you have selected e.g. 20 queues and selected column “In queue now”, the number of queues shown in your wallboard might vary between 20 and 0 every time it’s refreshed.

Available columns to choose from:

- *In Queue now*
- *Preferred calls in queue now*
- *Max Wait time now*
- *SLA score now*
- *Call-backs in queue now*
- *Ready now*
- *Logged on now*
- *Connected now*
- *In Pause now*
- *Logged on ex pause now*
- *Offered so far*
- *Answered so far*

- *Answer% so far*
- *Answer% within SLA so far*
- *Answer% within SLA excl. abandoned so far*
- *Answer% within SLA excl. abandoned within SLA so far*
- *Avg. wait time for answered so far*
- *Avg. speak time so far*
- *Avg. wrap-up so far*
- *AHT so far*
- *Avg. Survey score so far*
- *Abandoned calls so far*
- *Abandoned calls within SLA so far*
- *Abandoned % so far*
- *Silent Call % so far*
- *Silent Calls so far*

About Offered, Answered, Answer rate and Abandoned in Ticker vs Statistics

In Ticker, a call/written request is counted as **Offered** when it arrives in queue. When a call/request later is answered by agent, it is counted as **Answered**, and if a caller/chatter hangs up while in queue, it's counted as **Abandoned**.

The different *Answer rate* metrics in Ticker are calculated as requests *Answered so far* divided by *Offered so far*, so as long as there are requests in queue, the reported answer rate is usually slightly lower than when no requests are waiting in queue.

Also, please note that there are other queue exits than *Abandon* (=Hang-up) and *Answered* by agent, e.g. callback ordered, caller left queue due to pressing x, timeout, caller left queue since queue was full or no agents logged on. There are several columns for such exits available in the statistics report Details per queue.

To compare values in Ticker queue at a given point during the day (e.g. at 1400) with values in the Details per queue statistics for this day from 0000 to 1400 will not give the same result, since in statistics we report an inbound call (as offered and answered) in the time period the call ended.

In addition, callback in queue complicates since the agent answers but not always the customer that ordered callback, and it might take long time from callback was ordered until the (last) callback call is done.

5.7.3 Agent Settings

Here you can choose the agents and agent columns that should be shown in your Agent Wallboard. Move agents and columns in the order you want, and then save.

Agent Settings ?

Selected Agents: 6 selected Show only agents logged on

- Andreas Wallin (Administrators)
- Christian Thorsrud (Administrators)
- Jan Rygh (Administrators)
- Paal Kongshaug (Administrators)
- Andreas NoLogon (Administrators)
- Kristian Halvorsen (Administrators)

Select Agent Columns: 6 selected

↔ Agent Status	↔ Time in Status	↔ Answered so far	↔ AHT so far	↔ Time logged on (ex. pause) so far	↔ User group
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Save Changes Undo changes

If you only want the Wallboard to show the agents that are logged on (among the selected agents), check *Show only agents logged on* before you save.

Available columns to choose from:

- *Agent status*
- *Time in status*
- *Offered requests so far*
- *Answered so far*
- *Avg. speak time so far*
- *Avg. wrap-up so far*
- *AHT so far*
- *Open dialogs*
- *Time logged on (ex. pause) so far*
- *Time logged on (incl. pause) so far*
- *Time in pause so far*
- *Profile name*
- *Phone number*
- *User group*

5.7.4 Display Settings

If you want to personalise the wallboard with **your own logo** (instead of using Puzzel's logo), you can **upload your logo file** to page *Services – Content*, and then select it in the list box *Wallboard logo file*.

▼ Display Settings ?

Wallboard Logo file: My special logo

Footer Text: [Text Input]

Max rows per Wallboard page: 10

Predefined Background Colour: [Color Swatches]

Custom Background Colour: [Color Picker]

Predefined Text Colour: [Color Swatches]

Custom Text Colour: [Color Picker]

Select a Font: Verdana

Save Changes Undo changes Default

If you want a **footer text** on the Wallboard, just type the text you want and save.

If you have selected several queues and/or agents, we recommend that you adjust the *Max rows per wallboard page* to fit your need.

In addition, you can choose which **background colour** you would like to have in the top right part of the wallboard, together with the text colour in the same area. You can choose between pre-defined or customised colours. Finally, you can choose among several **fonts** to display the text in. You can always click the *Default* button to reset all settings back to Puzzel's default settings.

5.8 Details about Agent Statuses

For customer with only phone queues, the agent's statuses are quite easy to understand (*Logged on/Logged off/Paused and Ready – Connecting – Connected – Wrap-up*).

For customers with chat, email or social media in Puzzel, it's a bit more complex.

These properties, found on page *Users – Products* under *Chat*, are important for agents that can handle written requests from Puzzel queues:

- **Allow to adjust max concurrent written requests**
 - Default is OFF, but we recommend turning it ON so that agents can adjust the number of written requests to handle.

- **Max total concurrent written requests: X**
 - The predefined max value, e.g. 5.
 - If agents are allowed to adjust, each agent's current max value is stored in "*Maximum total concurrent written requests – adjusted*", if the agent has adjusted the value.
- **Max concurrent chat/social requests**
 - Default is 0 (=not defined), which means that the value for *Max total concurrent requests* is used. If the value is changed by an agent*, the new value (between 1 and X) for this agent is stored here.
- **Max concurrent email/task requests: default 1**
 - *If the agent changes the value (between 1 and X), it is stored here.*
- **Block phone if number of written requests is greater than: Y**

In the Agent application, we show the agent's **phone status** (e.g. *Ready, Connected, Busy*), and each active written request is represented with a request tab. In addition, we shown the number of ongoing written requests in brackets next to the phone status, e.g. *Ready (1), Connected (1)* or *Busy (4)*. The agent's status is shown in the same way in the Administration Portal.

How does it work?

- If the agent's phone is *Ready (N)* (=not blocked due to >Y written requests), the agent can receive an incoming call.
- If the agent's phone is blocked due to >Y written requests, the agent's status is shown as *Busy (N)*.
- If the agent is connected to a caller (*Connected (N)*), the agent will not be offered new written requests from queue even if *Max number of written requests* is not reached.
- An agent (not connected to a call nor in wrap-up) can receive a written chat/social request or an email/etask request if the agent has "capacity" for more of this kind of written request (ref. the defined values for *Max concurrent chat/social requests* and *Max concurrent email/task requests*), but only if *Max total concurrent written requests* is not yet reached.
- The agent can make an outbound call even if the phone is blocked (*Busy*) due to > Y written requests.

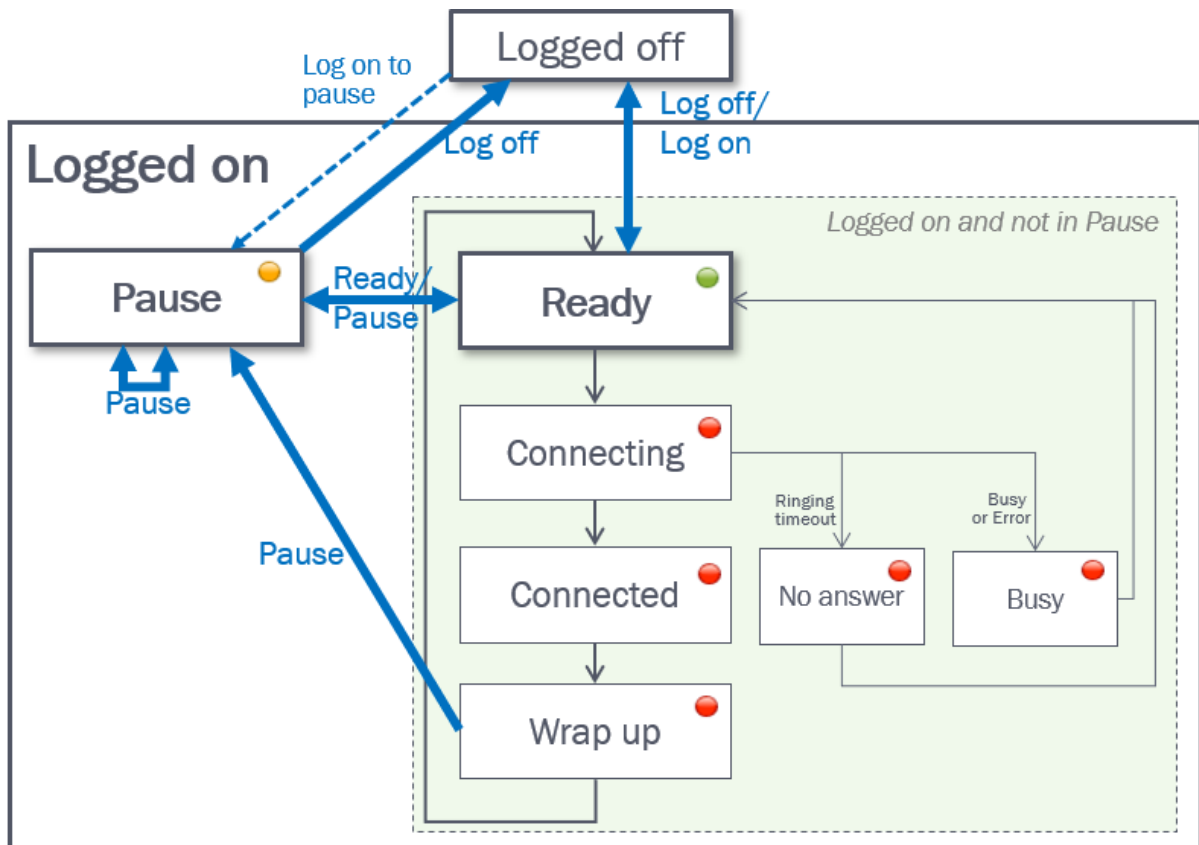
Example configurations

Parameter	A	B	C	D
Max total concurrent written requests	4	4	4	2
Max concurrent email/etask requests	1	1	1	2
Max concurrent chat/social requests	0*	4	3	2

* Example/column A and B above gives the same result, since *Max concurrent chat/social requests = 0* means it is not defined, so then we use the value for *Max total concurrent written requests*.

The sum of *Max concurrent email/etask* and *Max concurrent chat/social* should be equal to *Max total concurrent* (as in column C) or greater than the *Max total concurrent* (as column B and D).

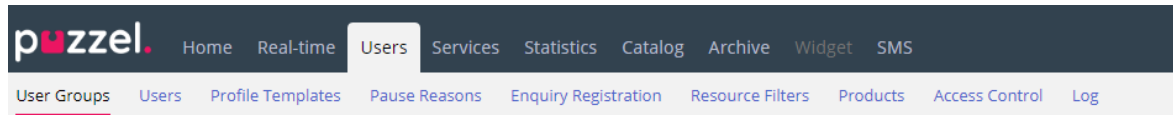
The different agent statuses are illustrated here:



Status description	Status name
Agent is logged on and Ready to receive requests	Ready
A phone call has been sent to the agent, but the agent has not yet answered.	Connecting
The agent is connected to a caller	Connected
The agent has status wrap-up for x seconds after he/she has hung up the phone. The agent may change his status to Ready at any time to shorten the pre-defined wrap-up time, and if configured, the agent can extend his current wrap-up status.	Wrap-up
When a call to an agent is rejected by agent or results in busy or error, the agent's status is set to Busy for X seconds (default=15), before status is set back to Ready . Status Busy is also shown when the agent's phone is blocked due to >Y ongoing written requests. Ref <i>Block phone if >Y written requests</i> (Users – Products – Chat). The agent can change his/her status to Ready when in status Busy .	Busy
When a call to an agent is “ringing” but not answered within the predefined ringing time (default 30 sec), the agent's status is set to No answer for the configured number of seconds (default=15), before status is set back to Ready . The agent can change his/her status to Ready when in status No answer .	No answer

6 Users

Under the *Users* tab you will find these sub-menus:



This is where you can manage users, user groups and their profiles and settings/access rights. Each user belongs to one user group. Puzzel users can be divided into 4 main types:

- **Administrators** (and supervisors) using the Administration portal
- **Agents** using the agent application
- **Wallboard** users (with access to Wallboard only).
- **Bots** (automated agents running scripts)

A typical Puzzel customer has one or a few user groups for administrators, several user groups for agents and one user group for Wallboard (and a user group for Bots, e.g. related to a chat-bot solution).

A user group **inherits** the Puzzel customer's settings (properties and access rights), and all the users in a user group inherit these settings from their user group. However, different user groups can be given different settings, and you can configure different settings for different users in the same user group.

It is very important that regular agents are not placed in a user group for administrators.

6.1 User Groups

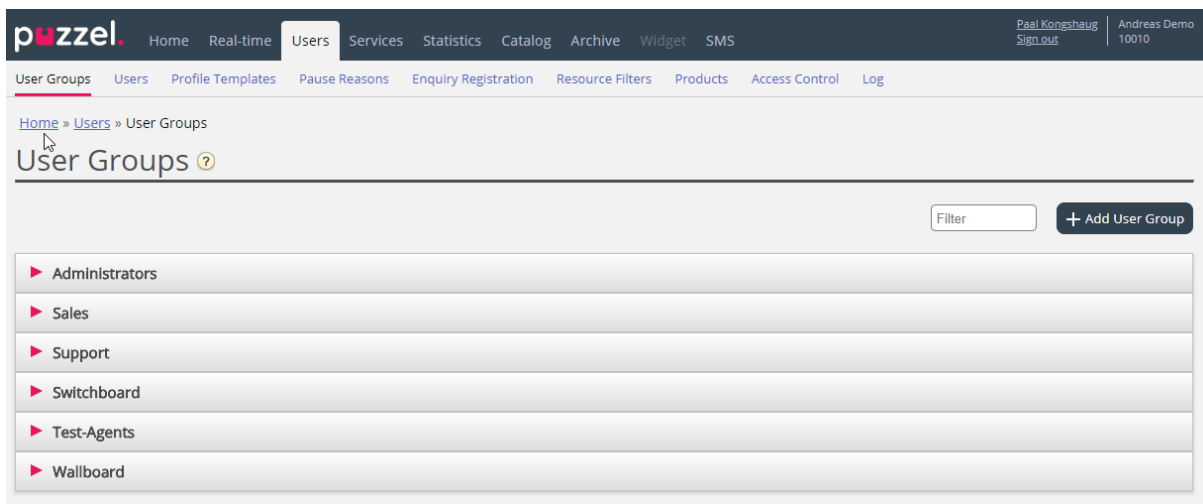
Under *Users – User Groups* you can manage user groups and user group profiles. When creating users, each user is placed in one user group. For instance, one user group could consist of agents mostly taking care of the sales queue(s), while another user group consists of agents in the support department. Agents can be placed in the same user group based on e.g. queues they answer (skills), department/role or location.

When defining your User groups for agents, remember that the profiles agents log on with are defined on a user group level, that settings are easiest to handle on a user group level, and that user group is used in statistics reports and in Ticker.

If you want to give your administrators (supervisors) different access rights, you can do this with only one administrator user group, or you can have several user groups for administrators/supervisors, and/or you can use [resource filters](#).

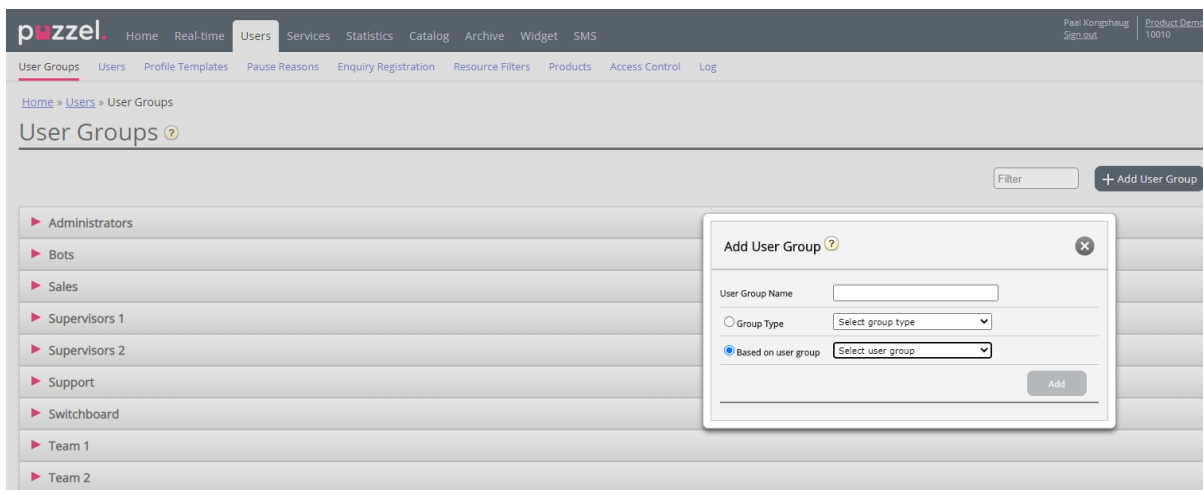
If you do not want all your administrators in the same user group, do not put the administrator for a specific user group (e.g. Customer service) in the user group where his/her agents are. If you do so, this user group must be given the rights the administrator needs, and several admin rights must then be removed from each existing and new agent user in this user group! Instead, create a separate user group for the admin(s) for this user group, e.g. called “Customer service Admins”.

When you open the User Groups page, you will see a list of user groups in your solution.



6.1.1 Add User Group

To add a new user group, click on *Add User Group*. A new window will appear, asking you to name the new user group and to select a Group type OR “Based on user group”.



If you want e.g. 5 agent user groups in business area x with identical settings and 6 agent user groups in business area y with identical settings that are different from business area x, we recommend that you first create one Agent type user group (Team 1 - area x) and configure everything as it should be for this user group, and then create new

user groups (team 2-N) based on the user group that has the needed settings (here Team 1 – area x).

If you create a new user group based on an existing user group, we copy these settings from the existing user group to the new:

- All settings from Users – Products
- Administration property settings (if any is set)
- Resource filters assigned (if any)
- Tab and widget configuration

If you select to create a new user group and select Group type, these are the types to choose among:

- **Agents**
- **Administrators**
- **Wallboard** (only access to Wallboard, and Web session timeout is set to 31 days)
- **Bots** (all auto-logout options turned off and max requests set to 8)

About Administrator user groups

If you want a new user group for **Administrators** to have different access rights than the existing admin user group company “default”, you can adjust the new user group’s access rights after it is created, by adjusting property values under *Users – Products (Admin Portal Menu)* and *Users – Access Control (Administration)*.

You can also create a new admin user group based on an existing admin user group to get the same settings.

About Agent user groups

Once you have created a new user group for **Agents**, you can add group profiles to it and create new users in the user group, and possibly adjust settings under *Users – Products (Agent application)* and under *Widget – Tab configuration*.

A new user group with type Agents is only given “agent access rights”.

- Property *Edit my own company* (under Administration) is set to OFF.
- These properties will be given value OFF:
 - *Enable Menu Archive / Catalog / Real-time / Statistics*
 - *Show agent details action column (under User – Products – Queue)*

If a user in an Agent user group signs into the Administration portal, he will only have access to the Home Page tab.

You do not need to turn off *Enable menu Users/Services/Widget/SMS* for agent user groups, since these menus are automatically disabled for users with *Edit my own company OFF!*

If *Enable Menu Real-time / Archive / Statistics* is turned ON for an Agent user group (with *Edit my own company OFF*), the users will see these menus if they log on to the Administration portal.

6.1.2 User Group Profiles

Each user group (with agents) should have at least one group profile (to be able to log on to answer requests). All user group profiles are as default available for all users within the user group, but you can uncheck user group profiles that should not be available for individual users.

To see the defined group profiles for a user group or to add new or edit a profile, click on the user group name.

User Groups ?

Filter + Add User Group

- ▶ Administrators
- ▶ Sales
- ▼ Support
 - User Group Information
 - [See all users in this user group](#) User Group Name:
 - User Group Profiles

#	Name	Skills: (9 is highest, 1 is lowest, 0 is to pick from queue)	Apply profile to
1	<input type="text" value="All queues"/>	<input type="checkbox"/> Chat <input type="text" value="9"/> <input type="checkbox"/> Email <input type="text" value="5"/> <input type="checkbox"/> Phone <input type="text" value="9"/> <input type="checkbox"/> Social <input type="text" value="7"/> <input type="checkbox"/> Sales <input type="text" value="5"/> <input type="checkbox"/> Support <input type="text" value="9"/> <input type="checkbox"/> Switchboard <input type="text" value="3"/> <input type="checkbox"/> Facebook <input type="text" value="9"/> <input type="checkbox"/> Twitter <input type="text" value="9"/> <input type="button" value="+"/>	<input checked="" type="radio"/> None <input type="radio"/> Users
2	<input type="text" value="Support"/>	<input type="checkbox"/> Phone <input type="text" value="9"/> <input type="checkbox"/> Support <input type="text" value="9"/> <input type="button" value="+"/>	<input type="radio"/> None <input checked="" type="radio"/> Users
3	<input type="text" value="Switchboard"/>	<input type="checkbox"/> Phone <input type="text" value="9"/> <input type="checkbox"/> Switchboard <input type="text" value="9"/> <input type="button" value="+"/>	<input type="radio"/> None <input checked="" type="radio"/> Users

- ▶ Switchboard

Change content in existing profile

You can delete a skill or change skill level for a skill already in a profile on this page. If you want to add a skill to a profile, click + to open the Add skills window.

If you change the content of an existing group profile (add or remove a skill or change skill level), this will have effect immediately on agents now using this profile. You should notify your agents when a profile's content is changed.

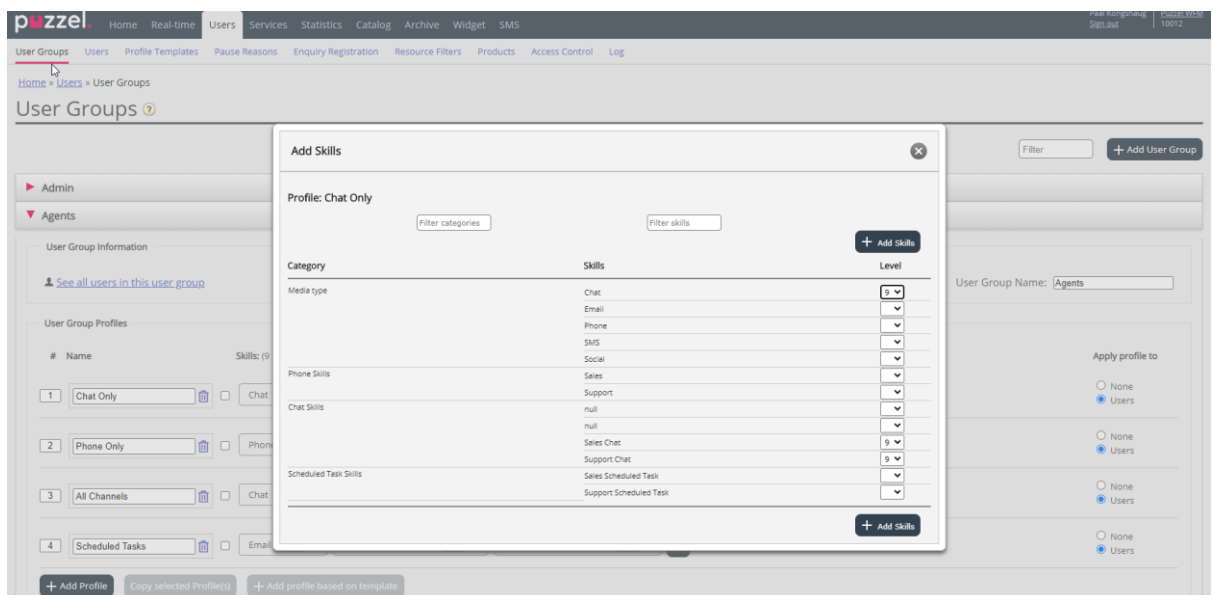
Create new user group profile

There are 3 ways to create a user group profile:

- A. Add a profile and manually select the skills that should be included.
- B. Copy a profile (from this or another user group) and optionally adjust it.
- C. Add a new profile based on a profile template, and optionally adjust it.

A. To add a new profile:

1. Click on **Add Profile** and type a desired name for the profile.
2. To add skills in the profile, click on the + sign.
A popup window listing all skills appears.



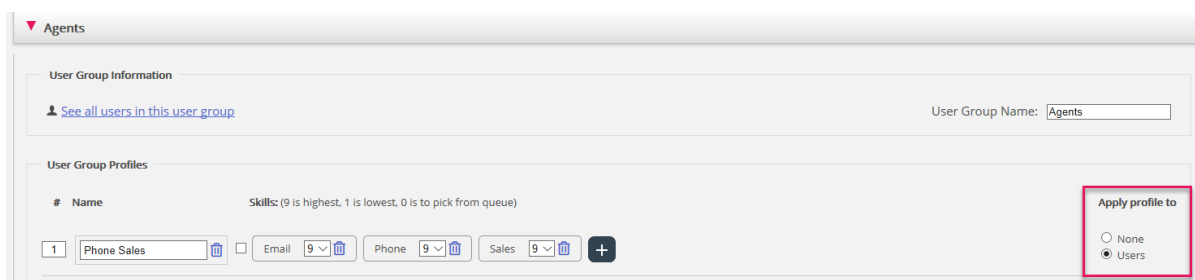
If you have lots of skills in different skill categories, you can use the Filter input boxes to limit which skills that are shown in this window.

3. Set the correct level (1-9) on the media type(s) (Phone, Email, Chat, Social) and ordinary skills that should be included in the profile. 9 is the highest/best level and 1 is the lowest. Level 0 makes the agent a part of the queue, but he will not

be allocated requests automatically. If agents should be able to **pick requests from queue**, the property “Enable agent to Pick from queue” (Users – Products – Queue) must be turned on. If property “Show only relevant queues” or “Show active queues” is turned on, the agent needs level 0 on the skill to see the queue in Queue overview. An agent’s skill score on a specific queue is the sum of the skill levels for the skills this queue consists of. If the agent has skill level 9 on Phone and 9 on Support, the agent’s skill score is 18 on the Phone+Sales queue. You can use TAB (and Alt+TAB) to quickly navigate down (and up) the list. Click the + Add skills button when you’re done editing skills in this profile.

4. Verify that the new/changed profile is OK before you click Save changes.

When creating a new user group profile that all or most agents should have access to, we recommend you tick *Apply to - Users* before saving it.



You can enable/disable each profile on each user if not all users in a user group should have all group profiles enabled. If you change value for Apply to from Users to None or vice versa for an existing profile, all users in the user group will now have this profile disabled (enabled).

B. Copy profile

If you want to create a new profile that is similar to an existing profile, you can select the profile (checkbox next to the name – (1)) and click *Copy selected profile(s)* in the user group it should be copied to. This might be in the same user group or in another - (2)).

The screenshot displays two panels for configuring user group profiles. The top panel is for the 'Support' user group, and the bottom panel is for the 'Switchboard' user group. Both panels show a table of profiles with columns for '#', 'Name', 'Skills', and 'Apply profile to'. In the 'Support' panel, profile 2 'Support' is highlighted in green, and a red circle with the number '1' is placed over the 'Copy selected Profile(s)' button. A second red circle with the number '2' is placed over the 'Copy selected Profile(s)' button in the 'Switchboard' panel. The 'Apply profile to' column has radio buttons for 'None' and 'Users'.

When you click *Copy selected profile*, the profile is pasted into this user group. Before you save, you should change the new profile's name (from *Copy of xxxx*) and optionally add/remove skills and adjust skill levels if needed.

C. Create group profile based on a profile template

If you want identical or very similar profiles in several user groups, we recommend that you define *Profile templates* and then create group profiles based on these templates. The reason is that when you later want to change a profile template, the changes in the template will automatically be deployed on all group profiles that are based on the template. Please see the next chapter for more details on templates and how changes to templates affect group profiles based on them.

To create a group profile based on a template, click *Add profile based on template*, then select the correct template. The template is now shown as a new group profile. Click *Save*, or optionally adjust the name and the skills/skill levels before you click *save*.

A user group profile based on a template has the template's name shown below the profile name.

6.1.3 Profile Numbering

The group profiles must be numbered from 1 and upwards, with no gaps (e.g. 1, 2, 3 and 4). All agents in a user group that have group profiles, will have the same number for the same group profile. You can manually change the order of group profiles. Example: If you want today's profile number 3 to be number 1, you change its number to 1, and you must also change today's 1 and 2 to be number 2 and 3 before you click *Save Changes*.

If you change group profile numbers, the profile numbers for the agents are updated automatically!

Agents that do not have access to all group profiles, will therefore have gaps in their profile numbers. If agents have personal profiles, they are automatically given numbers starting with the first available number after the highest group profile number.

6.2 Profile Templates

If you need identical or similar profiles in several user groups, we recommend that you create Profile templates and use these when you create new profiles for user groups. If you change content in a template, all group profiles based on this template are updated accordingly. On this page, you can create Profile templates.

One template contains several skills, each with a belonging skill level. You can also see which user group profiles that are based on a specific template, and you can change the content of an existing template.

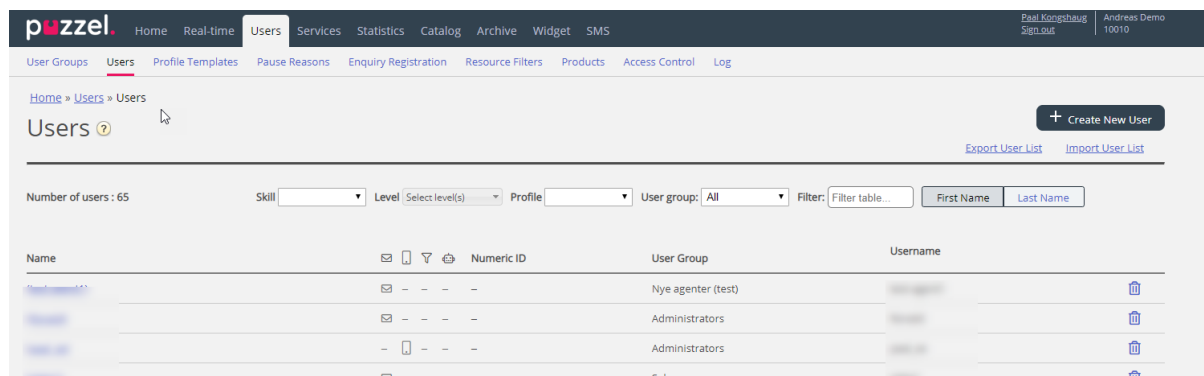
When you change content in an existing profile template, it affects the user group profiles that use this template like this:

- If a template’s **name** is changed, the name of a user group profile based on this template is not updated.
- If a **new skill** is added to a template, this new skill is added to all group profiles based on this template if they don’t already contain this skill.
 - If a group profile based on this template already contains the new skill, this skill’s level is not changed.
- If a **skill is deleted** from a template, this skill is removed from group profiles based on this template regardless of skill level for this skill in the group profile
- If **skill level** is changed on a skill in a template, the group profiles based on this template that contain this skill with the original skill level will be given the new skill level. If this skill is not present in a group profile based on the template, it is not added to the profile.

6.3 Users

6.3.1 User List and Edit User





Under *Users – Users* you find a list of all users, and you can add, edit and delete users.



You can choose to show all users or users in a user group, listed alphabetically by *First name* or *Last name*. You can search for users by typing e.g. (parts of) the first name, last name, username, email address, mobile number or a resource filter name in the **Filter** input box. You can uncheck columns you don't want to search for match in. A search for e.g. `paal ko` returns users containing `paal` OR `ko`, while a search for `"paal ko"` returns users containing the whole string within the quotation marks. You can sort the list by clicking on column headings.

You can also search for users with a given skill and optionally specific skill levels in all or a selected user group, and you can search for users having a specific profile.

The columns:

- **Name:** If the user's first and last name is entered, it will show in this column. Otherwise, the user's username will show. Click on a user's name to open the Edit user page for this user.
- : Users with registered email address will have this symbol (and email address as tooltip).
- : Users with registered mobile number will have this symbol (and the number as tooltip).
- : Users with filter(s) assigned to them will have this symbol (and filter name as tooltip).
- : Users that are bots (automated agents). Only Puzzel can mark a user as bot!
- **Numeric ID:** Each agent can have a unique numeric ID, e.g. employee-number. If an agent needs to log on to queues using the phone ("back-door"), this number is needed.
- **User Group:** What user group the user (agent) belongs to.
- **Username:** The username is what the user is using to log on to Puzzel, either in the agent application or in the Administration portal.
- **Delete:** Click on the Garbage can icon to delete the selected user.

Click on a user's name to open the *Edit User* page.

Profiles available for the user

Click on *Group profiles* on page *Edit User* to see the available group profiles for this user.

#	Profile Name	Use	Skills: (9 is highest, 1 is lowest, 0 is to pick from queue)
1	Sales	<input checked="" type="checkbox"/>	Phone 9, Sales 9
2	Support	<input checked="" type="checkbox"/>	Phone 9, Support 9
3	Switchboard	<input type="checkbox"/>	Phone 9, Switchboard 9
4	All Queues	<input checked="" type="checkbox"/>	Phone 9, Email 9, Chat 9, Sales 9, Support 9, Switchboard 9, Facebook 9, Twitter 9
5	Social	<input checked="" type="checkbox"/>	Email 9, Facebook 9, Twitter 9

If you want to change which group profiles this agent should be able to use, check/uncheck the relevant profiles and save.



If you need to create/edit a personal profile, this can be done under accordion *Personal profiles*.



6.3.2 Create New User



Click on the *Create new user* button on the *Users – Users* page to create a new user.

[Home Page](#) » [Users](#) » [Users](#) » Add User

Add User

First Name	Last Name	Username*	Numeric ID
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> See used IDs
Email address*		Mobile number	
<input type="text"/>		<input type="text"/>	
Password	Repeat Password	User Group*	Language*
<input type="text"/>	<input type="text"/>	Administrators 	EN 

 **Group Profiles** 

 **Personal Profiles** 

Save User

On the *Add User* page, you register the new user's personal details. *Username*, *User Group* and *Language* are required fields, and we also require that an email address or a mobile number (including 00 and country code) is registered.

Email address or mobile phone number is needed to use the "Forgot password/Need new password" feature.

We recommend you define *Numeric ID* since it is used in statistical agent reports (shown as Agent ID), and it is necessary when users want to log on or off the contact centre queue(s) via telephone (if access to a PC connected to internet is unavailable). By clicking *See used IDs*, you can see what numbers are already in use.

An administrator should register a new user with email address or mobile number and no password. Then tell the new user to click *Forgot password/Need new password* on the agent application or admin portal log in screen to receive a one-time password by email/SMS so that password can be defined. Existing agent users with no email/mobile registered can add their own email address/mobile number to their user account.

Group profiles (for user)

Group profiles are defined per user group. Click on the Group profiles heading to open the accordion and see the available group profiles for this new user. Check/uncheck the profiles you (don't) want to be available for this new user before clicking *Save User*.

Personal profiles (for user)

Personal profiles are profiles that only the chosen user has access to. A user can have none, one or more personal profiles. A personal profile is created in the same way as a group profile, and you can select the name, the skills and skill levels you would like the profile to contain. If you have changed skills or skill levels in a profile, remember to save.

Delete user

You can delete a user, but not if the user is logged on to queue.

Move a user to another user group

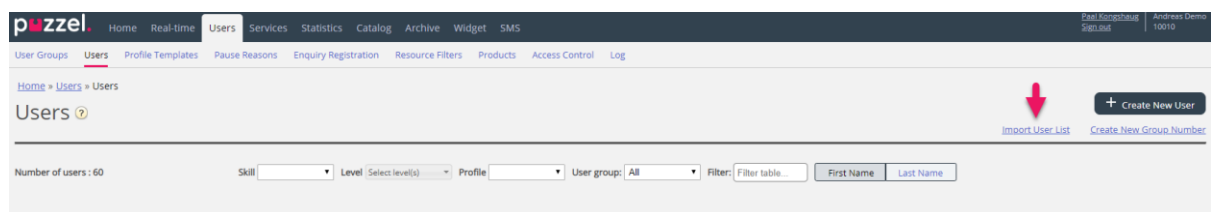
You can move a user from one user group to another if the user is not logged on to queue, but you should always tell the user since the available profiles will change.

Please note that if a user has been given a specific value for a property (e.g. Wrap-up timeout phone = 60 sec) instead of inheriting the user group's value, such a specific value on a user will be kept when the user is moved. The same applies to resource filters; If a user has been assigned a resource filter (not inherited from group), this filter will still be applied to the user if the user is moved to another user group.

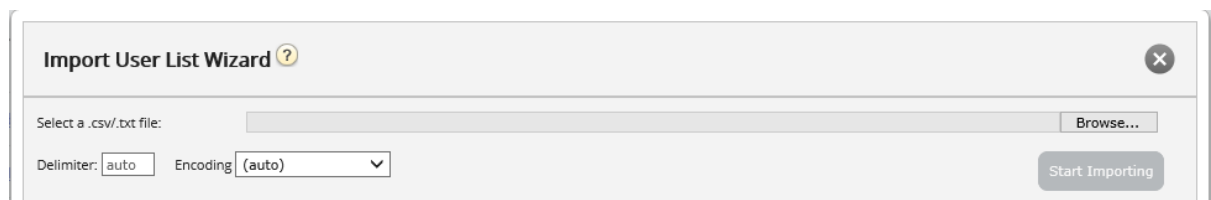
Also note that the API (UserUpdate) does not support to move a user to a new usergroup.

6.3.3 Import List with New Users

You can import a file with several new users as an alternative to creating one user at a time. Click on the *Import user list* link on page *Users – Users...*



... to open the *Import User list wizard*:



In the *Import User List Wizard*, select the txt/csv* file on your computer, preview it, and click *Start importing* if the format is correct. If one or more “cells” contain invalid values, error messages will be given in tooltips in red cells, and you cannot import the file.

* We recommend **UTF-8** encoding for the file to make sure characters other than a-z are shown correctly.

Import User List Wizard ?

Select a .csv/.txt file: Browse...

Delimiter: Encoding: Start Importing

user_name	firstname	lastname	user_num	email	mobile	usergroup_name	language_code
user1	paal	olsen	12	user1@mail.com		Sales	no
user2	per	nilsen	13	user2@mail.com		Sales	no
user3	kari	pettersen		user3@mail.com		Sales	no
user4	truls	berg			004799100000	Sales	no
user5					004799100001	Sales	no
user6						Support	no
user7					004799100003	Support	no
user8					004799100004	Support	no
user9					004799100005	Agents	no
user10					004799100006	Agents	no

The cells with red borders contain invalid values. See tooltip over each cell, and open the Help text (?) for more details on the required format and column descriptions.

The first row in the file must contain these column names:
user_name, firstname, lastname, user_num, email, mobile, usergroup_name, language_code.

Row 2-N contains the **new** users. We allow max 100 rows in a file.

If the file contains a row with an existing user_name, the user_name cell will be red and the file cannot be imported.

About the columns:

Column	Description
user_name	Required and must be unique (max 32 characters)
firstname	Optional (max 32 characters)
lastname	Optional (max 32 characters)
user_num	The Agent id shown in statistics (max 6 digits). Must be unique. Optional
email	On format “*@*.*”. Must be unique. Used for one-time passwords. Email address <u>or</u> mobile number is required!
mobile	Must be unique and include 00 and country code, but no spaces or brackets. Used for one-time passwords. Email address or mobile number is required!
usergroup_name	Required. You must use an existing user group name.
language_code	Required. Choose between en, no, dk, se, bu, hu, fi.

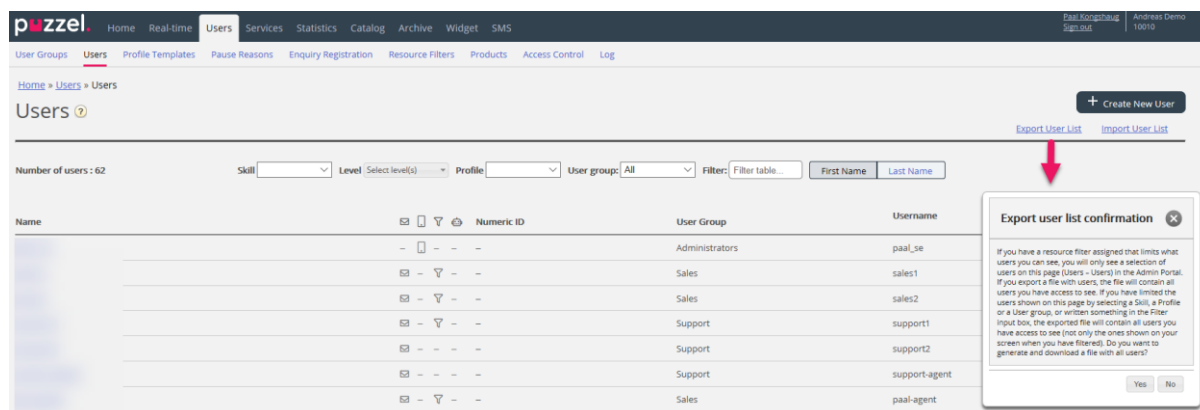
How to save numbers starting with 00 from Microsoft Excel?

Format the column as text (select the column, right-click and choose 'Format cells', then choose 'Text'). Or type ' before the digits ('004712345678) so that Excel understands this is text and shows the leading zeros. Then save the file as CSV or UTF-8 (txt).

6.3.4 Export user list

You can download an xlsx file with user information. This file contains the same columns as in an import file (user_name, firstname, lastname etc), plus user_id. This user_id is needed if you want to import a file with external IDs for SSO, and user_id is used in Raw data.

If you have a resource filter assigned that limits what users you can see, you will only see a selection of users on this page. If you export a file with users, the file will contain all users you have access to see. If you have limited the users shown on this page by selecting a Skill, a Profile or a User group, or written something in the Filter input box, the exported file will contain all users you have access to see (not only the ones shown on your screen when you have filtered).



6.3.5 Import external IDs (for SSO)

If your company's users have Microsoft **Azure** accounts they sign in to, the users can sign in to Puzzel's agent application without entering their Puzzel customer number, username and password.

A Puzzel user with an Azure external id defined in Puzzel can use URL <https://agent.puzzel.com?connection=azure> to sign in to Puzzel's agent application without entering the Puzzel username and password.

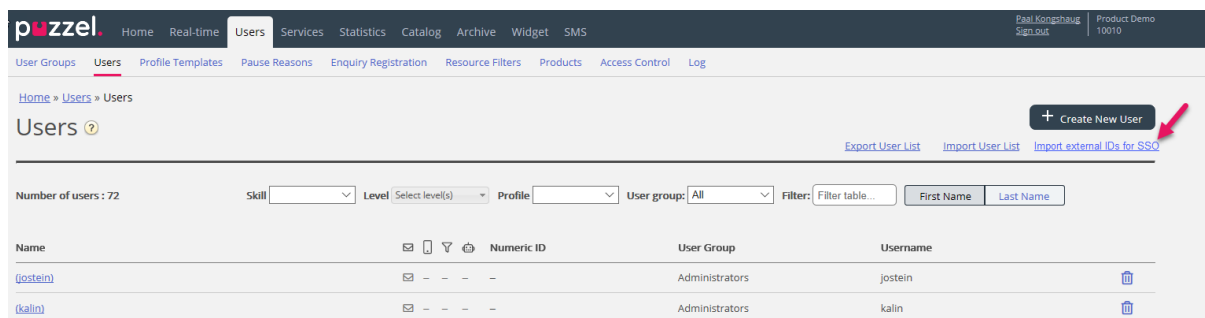
Please note that we do not support SSO to <https://admin.puzzel.com>

You can upload a list with external IDs for the users that should be able to use such SSO on page Users – Users.

First, the relevant external authentication provider (e.g. Azure) must be defined on page Users – Products under Sign in to Puzzel.

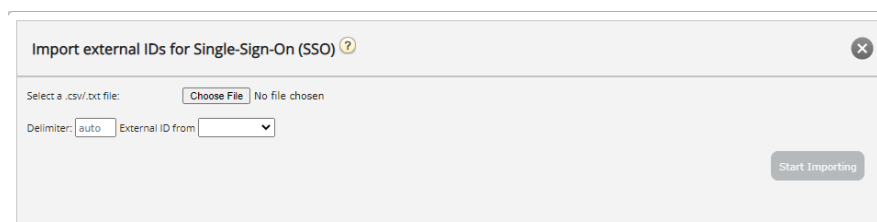
Then you need to add the external id for the relevant user. On page Users – Users you can add the external id to one user at a time (Edit user), or you can upload a file with max 250 rows/users and 2 columns:

- external_id (which is usually the user’s email address).
- user_id in Puzzel



We suggest you first export a list with all your Puzzel users, since this list contains several columns, including email address and Puzzel user_id.

Then delete all columns except email and user_id, and make sure all rows (agents) you want to keep in the file have the correct external_id (email address). Then click *Import external IDs* to open the Import window, and then choose the file from your disk.



You will now see the file content, and if the file has the correct header row, no missing values, no duplicates and no non-existing external_ids or user_ids, you can click *Start importing*. If the list is not shown correctly, try entering the correct delimiter (; or ,) where it says ‘auto’. Please make sure you select the correct value (usually Azure) in list-box ‘External id from’.

All external ids must be unique, and if a user_id in the file already has an external id registered, we will replace this user_id’s old external id with the new one.

When the import is done successfully, agents should be able to use sign in to Puzzel agent application without entering a Puzzel username or password.

To verify that an agent has the correct external id registered in Puzzel, please find the user on page Users – Users, and click on this user’s name to open the edit user page for this user.

If the user’s external id is missing or is wrong, you can edit it here.

To configure Single-Sign-On to Puzzel with **Salesforce** (when Puzzel is integrated with Salesforce), please see: <https://help.puzzel.com/hc/en-us/articles/360003961098-Puzzel-Salesforce-admin-guide>

6.3.6 Create New Group Number

Group numbers (aka “Unblockable agent”) and the *Create New Group number* link are shown in the Administration Portal only for users that has the Administration property *Show Group numbers ('Unblockable agents')* set to ON. Please do not start using a *Group number* before you know how it works!

Click *Create New Group Number* to start creating a new group number.

This page opens:

Create New Group Number [?](#)

Group Number Name	Telephone Number	Number of lines	Numeric ID
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> See used IDs
Password	Repeat Password	Language	
<input type="text"/>	<input type="text"/>	BG	

The input fields

- *Group number name: The name of the group number.*
- *Telephone number: The phone number Puzzel should call.*
- *Number of lines: The number of concurrent calls that will be connected by Puzzel to the group number. Calls exceeding this amount are queued in Puzzel.*
- *Password/confirm password: If someone is to log on to Puzzel with this Group number user they need a password.*
- *Language: Will be the user's language in Puzzel.*

A group number usually belongs to your telephone platform (e.g. PBX). By using a group number, you can have more callers queued than the lines on your PBX system. Calls are not queued in Puzzel before all the telephone lines in your platform are in use. A group number must be logged on to queue using the agent application or the Administration portal.

You can only define one profile per group number. Both ordinary agents and a group number (with several lines) can answer the same queue.

If the agents behind the group number is transferring Puzzel calls, Puzzel will not notice that the agent (the group number line) has become ready until the transferred call ends.

Therefore, to avoid the combination of ready agents and callers in queue, more group number lines could be defined than the planned number of real agents.

Example: With 10 agents behind the group number, 15-20 lines could be defined in Puzzel. If you are not certain how group numbers work, we encourage you to contact Puzzel support to help you out in creating one.

A Group number is not listed on page *Users – Users* unless Puzzel support has turned on the admin property *Show unblockable users*. If Group numbers are shown, they are listed with an icon in front.

Home Page » Users » Users

[+ Create New User](#)

Users ? [Import User List](#) [Create New Group Number](#)

Show: All Users Filter: Filter table... Sort by: First Name Last Name

Name			Numeric ID	User Group	Username	
ACD Group number	-	-	-	(group number)	ACD Group number	
Andreas Wallin			2621	Administrators	anwa	
Anne Operator	-	-	-	Switchboard	anop	

6.4 Pause Reasons

If you want to see the reason why your agents are using the Pause status, you can define different pause reasons. On page *Users – Pause Reasons* you can see the defined pause reasons and create new ones.

Home » Users » Pause Reasons

Pause Reasons ?

- Break
- Lunch
- Administration
- Meeting
- Training

[+ Add Pause Reason](#) [Save Changes](#) [Undo changes](#)

To create a new pause reason, click the + button, and then insert the name of the pause reason. To delete it click on the corresponding garbage bin symbol.

The pause reasons appear in the same order in the agent application as shown here. If you want to change the order, just drag and drop and then click Save changes.

By default, all agents will see the same Pause reasons. If you want to show different Pause reasons for agents in different User Groups, you can do this by creating [Resource Filters](#) and assigning them on different User Groups.

Please see chapter [Wrap-up vs Pause/Pause reasons](#).

6.4.1 Max time per pause reason

A column called *Max time per day* is shown if property *Enable Max time per pause type* (under Users – Products – Agent application) is turned ON. If you want to try to limit how

long pauses agents can have per day, you can define a maximum time for one or more pause reasons, e.g. max. 30 minutes for “Break”. The defined Max time per day is applied to agents with this property turned ON, and not all user groups/agents need to have it ON. When an agent with this property turned ON wants to choose a pause reason, a pause reasons with a defined max time are not shown **if** the agent so far today has spent more than the defined max time in this pause reason.

6.4.2 Wrap-up vs Pause/Pause reasons

We strongly recommend configuring a pre-defined wrap-up time (e.g. 30 or 300 seconds) for phone calls, so that agents automatically are set to status Wrap-up after hang-up.

You can also configure that the agents can **extend** the wrap-up. The agents can click *Ready* while in status wrap-up, and the time the agents are in status wrap-up is reported as wrap-up (and included in AHT) both in statistics and in real-time Ticker and in Wallboard.

We do not recommend creating a pause reason called (extra) wrap-up, since time in a pause reason called wrap-up is only reported in the statistics report *Time per pause type* and not included in Wrap-up and AHT in Real-time Ticker nor in statistics or Raw data.

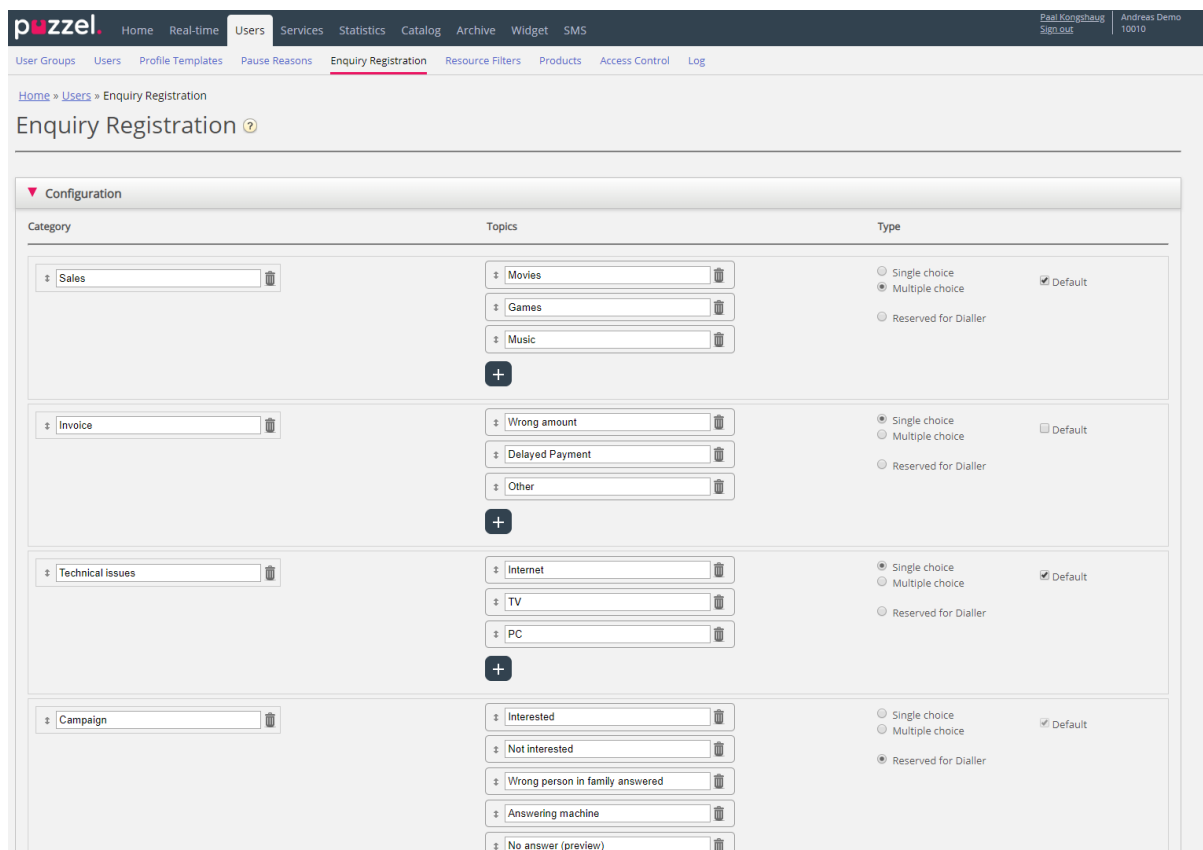
To minimize agent clicking, we recommend a quite long pre-defined wrap-up (e.g. 5 minutes) so that agents usually only need one click (“ready”) when ready for next call. If the predefined wrap-up is short (e.g. 30 sec), the agent quite often needs to click “extend wrap-up” before wrap-up ends, and then click ready when ready. And if agent forgets to extend wrap-up before wrap-up ends, he receives a new call when he’s not ready to answer.

6.5 Enquiry Registration

With Enquiry registration (sometimes called “wrap-up codes”), your agents can document what each call/chat/email was about, for statistics purposes and for the Archive.

Agents usually do the Enquiry registration while in status wrap-up, but it can be done while connected or even after wrap-up has ended.

The Enquiry Registration Categories and Topics the agents can see are defined on page *Users – Enquiry Registrations*.



Categories represent the main themes that your requests can be categorised in, while topics represent the sub themes for each category. You create new topics by clicking the + sign within the Category.

In the agent application, the categories and topics appear in the order they are shown here. If you want to change the order of categories or the order of the topics within a category, just drag and drop and then click Save changes.

In the *Type* column on the right, you can choose if it should be possible to mark one topic (Single choice) or more topics (Multiple choice) in this category, or if the Category is Reserved for Dialler.

If you want a **free text comment field** in the Enquiry registration part for agents, the Agent application property *Enquiry registration - Allow Comment* must be turned ON.

Your agents will receive a new Enquiry registration form each time they accept a new request in the Agent application (if configured).

We do not recommend having Enquiry registration in a separate tab, that is, not linked to requests, since such registrations are not shown in the Archive, nor in reports Enquiry registrations per queue and Enquiry registrations per agent.

All the (Single/Multiple choice) categories you create will by default be shown for all your agents unless you configure when to use the different categories:

- If you would like agents in different **User groups** to see different categories (not depending on queue the request came from), you can create **Resource filters** containing Enquiry registration categories and assign filters to user groups.
- If you would like to present different Enquiry registration Categories for agents depending on the **queue** the request came from (not depending on the agent's User group), you can define which **categories to show per queue**. This is done on page Services – Queues under [System Queue settings](#). The standard solution is that all “default” categories are shown for all queues.

We recommend including Enquiry registration categories in resource filters OR to configure categories per queue, since if you do both, it might be complex and difficult to get a good overview.

If you have the **Dialler** functionality, you can create one or more Categories and set them as *Reserved for Dialler*. For each Dialler campaign you can choose one Category (Reserved for Dialler) that should be used. A Category Reserved for Dialler will only be shown in the Agent application when an agent receives a call from a Dialler campaign queue that has chosen this Category.

The results of the enquiry registrations can be seen in the **Archive** and in **3 statistics reports**: Enquiry registrations, Enquiry registrations per queue and Enquiry registrations per agent. A registration not linked to a request (not possible in agent.puzzel.com) will only be included in the first report.

6.5.1 Forced Enquiry Registration

Agents can do Enquiry Registration, but it's optional. If you want to try to force your agents to do Enquiry Registration for each call/request, Forced Enquiry Registration can be configured for all or selected user groups.

If Enquiry Registration is not done during Wrap-up, the agent is, as usual, set to *Ready* when wrap-up ends, and then the agent might receive a new call. The pre-defined wrap-up should be quite long so that agents have time to do the registration before being set to ready and a new call arrives!

After a call, an agent using client.puzzel.com with Forced Enquiry Registration **cannot click Ready while in status *Wrap-up* unless an Enquiry Registration is done.**

With **agent.puzzel.com**, the agent cannot close the **call's** request tab if a registration is not done, even if the call's wrap-up has ended.

If an agent with Forced Enquiry Registration using **client.puzzel.com** tries to close a chat-, email- or social dialog tab before Enquiry Registration is done, a warning is given. If the agent uses **agent.puzzel.com**, the agent cannot close the request tab for a chat/email/social unless a registration is done.

It's also possible to configure that the agent is automatically set to status *Ready* after an Enquiry Registration is done while in status *Wrap-up*. With this solution (property *Enquiry Registration - Set ready after* turned ON), the agent does not need to click Ready.

If you start using Forced Enquiry Registration, we recommend you create an Enquiry Registration Topic called e.g. 'Consult call' or "Other" so that agents easily can register something after having answered a consult call.

6.6 Resource Filters

Resource filters is part of the Access Control feature that allows you to restrict certain users or user groups' access to different elements from different resources like display queues, user groups, pause reasons etc, both in the Administration Portal and in the agent application. To do so,

1. *Create a resource filter and define its content (Users – Resource filters)*
2. *Assign the resource filter on the selected user group(s) ([Users - Access Control](#)).*

Resource filters:

The screenshot shows the 'Resource Filters' page in the Administration Portal. The page has a dark header with the 'puzzel.' logo and navigation links like 'Home', 'Real-time', 'Users', 'Services', 'Statistics', 'Catalog', 'Archive', 'Widget', and 'SMS'. The 'Users' menu is active. Below the header, there are sub-navigation links: 'User Groups', 'Users', 'Profile Templates', 'Pause Reasons', 'Enquiry Registration', 'Resource Filters' (highlighted), 'Products', 'Access Control', and 'Log'. The main content area shows the 'Resource Filters' page with a breadcrumb 'Home > Users > Resource Filters' and a title 'Resource Filters' with a help icon. Below the title is a 'Filter table...' button. The table has two columns: 'Filter Name' and 'Edit Delete'. There are two rows: 'Sales filter' and 'Support filter'. Each row has an 'Edit' icon (pencil) and a 'Delete' icon (trash). At the bottom of the table, there are three buttons: '+ Add Filter', 'Save Changes', and 'Undo changes'.

A user group (or user) can have several filters assigned at the same time. Different filters can be created based on the different limitations needed, and each filter should be given a descriptive name, for example based on the user's geography, department or function and/or its content.

In the user list (*Users – Users*) you will see a filter symbol (with filter name as tooltip) for the users that have a filter assigned, and if you enter a filter name in the search field, the users with this filter applied will be listed.

6.6.1 Creating a New Resource Filter

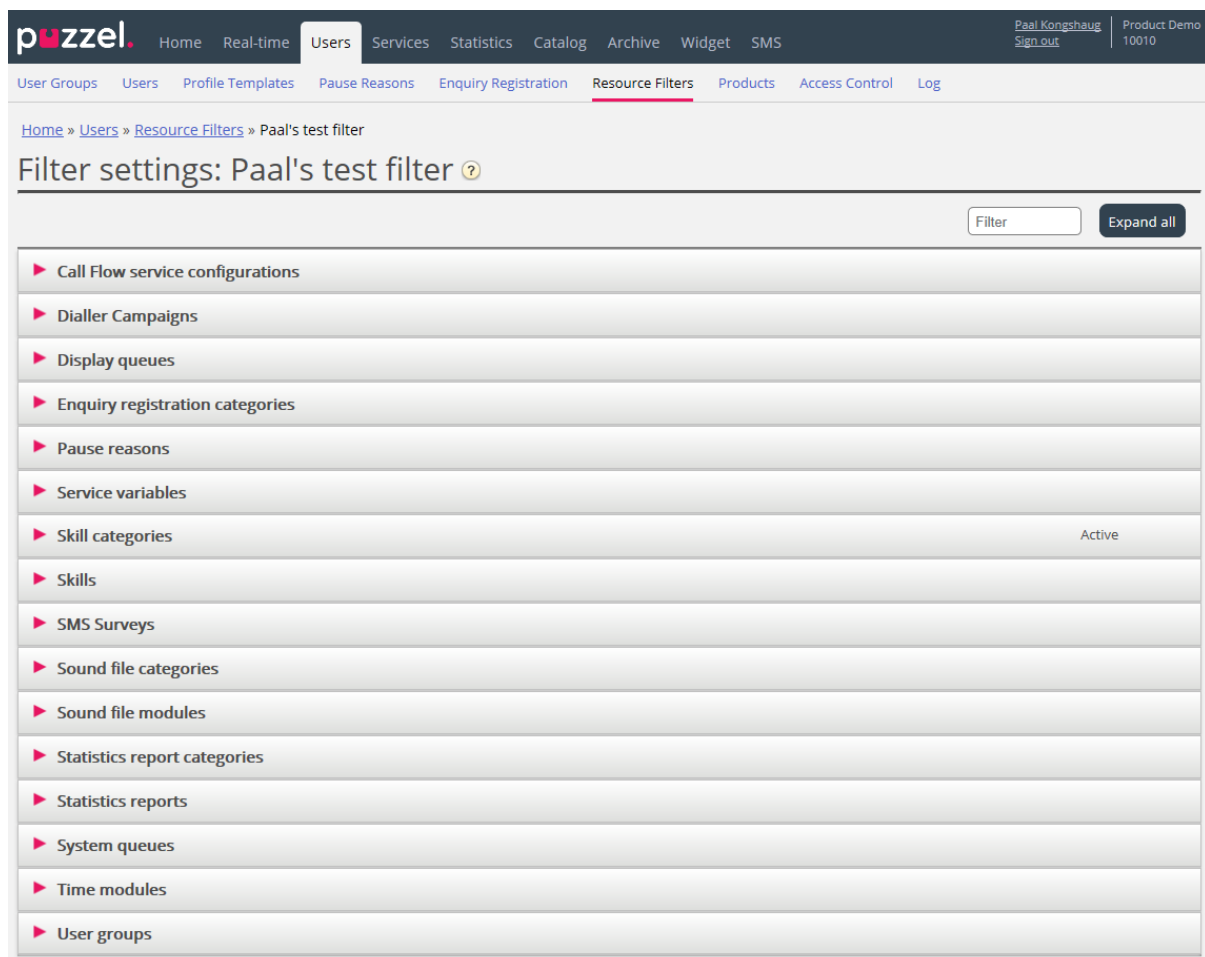
Click *Add Filter*, write a descriptive name for the new filter, and then click *Save Changes*.

Click on the pen symbol to change the name of a filter.

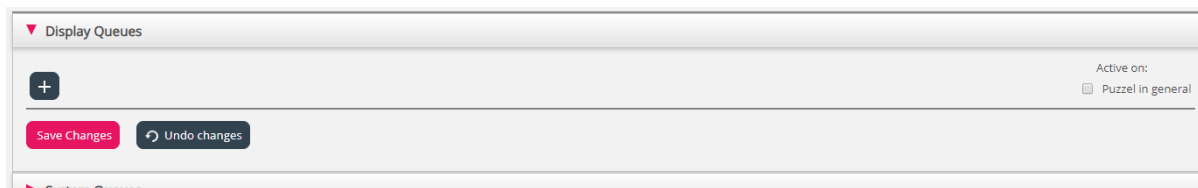
Click the *garbage bin icon* to delete a filter.

6.6.2 Defining Resource Filter Content

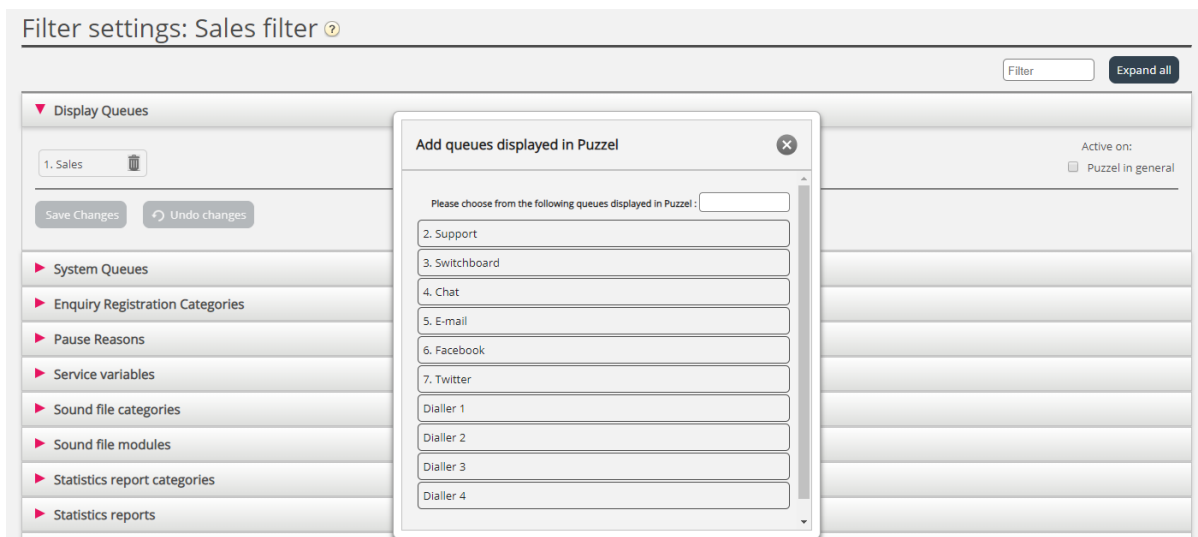
Once you have a created a resource filter, you can define its content by clicking on the filter’s name. On the Filter settings page, all the available filter areas are shown:



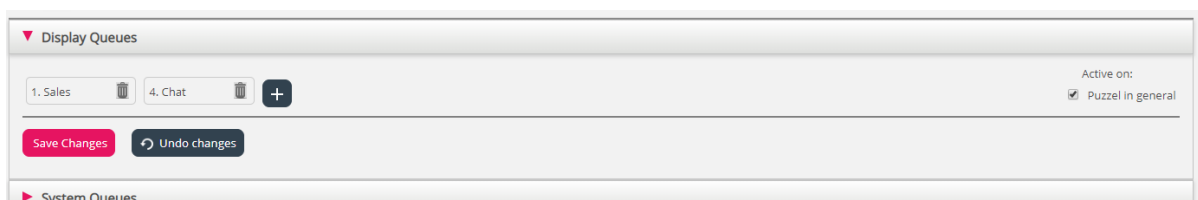
When you click on an area in the filter, e.g. *Display queues*, it opens, and you can see elements already included in the filter (none for a new filter).



To add elements to your filter, click the + button to open the window where a list of available elements appears.



To add an element from the list to the filter, simply click on the element (and it disappears from the list containing available elements). When you have added the relevant elements, click x to close the window. The chosen elements will now be shown:



To activate your filter, click in the relevant check-box(es) under *Active on*, and then save.

A filter area which is checked as *Active*, will have the text *Active* to the right in this overview.



When you have activated a filter, you have chosen what elements users will see. For example, by adding 2 display queues to a filter, users will only see these 2 display

queues when they have this filter assigned. If no elements are chosen in an active filter, users will see no elements.

Finally, you must apply this filter on a user/user group (*Users - Access Control*).

6.6.3 Resource Filter Areas

6.6.3.1 Display queues

Resource filters in this area influence what queues the user will see in the Queue Overview in the agent application, and in in the Real-time tab and under Display Queue Settings under Services – Queues in the administration portal. Users with such a filter assigned will only see the display queues in the filter, while users without such a filter assigned will see all display queues. In the agent application, users might see only relevant or active queues if *Show only relevant queues* or *Show only active queues* is configured.

6.6.3.2 System queues

If you create a filter in area System queues, you can choose to have it active for Puzzel in general, Statistics and/or Archive.

Active on:

- **Puzzel in general:** Check here if you want users with this filter assigned only to see the chosen system queues in Admin under Real-time – Ongoing requests, Services - KPI Alarm and Services – Queues – System Queue settings. If an agent user has a system queue filter, this will limit what Scheduled task queues and requests the agent will see.
- **Statistics:** Check here if you want users with this filter assigned only to see the chosen system queues in statistics reports that group traffic per system queue, e.g. Details per queue.
- **Archive:** Check here if you want users with this filter assigned only to see requests from the chosen system queues in the Archive.

How “Display queues” are related to “System queues” is explained in chapter [Queue display settings](#).

6.6.3.3 Call Flow service configurations

If you have several Call Flow configurations and not all admins with access to page Services – Call Flow should see all, then you can create a resource filter containing one

or more Call Flow configs, and then assign it to admins that should see only the Call Flow configurations in this resource filter.

6.6.3.4 Dialler campaigns

If you have several Dialler campaigns and not all admins with access to page Services – Dialler should see all, then you can create a resource filter containing one or more Dialler campaigns, and then assign it to admins that should see only the Campaigns in this resource filter.

6.6.3.5 Enquiry registration categories

If your Puzzel solution uses [Enquiry registration](#), all agents will see all categories defined in the Agent application's Enquiry registration part (except the ones Reserved for Dialler). If not all agents should see all the defined categories, you can define filters containing selections of categories and assign the filters to the relevant user groups, or you can define which Categories that should be used per queue (on page Services – Queues). Example: Create a filter containing categories used for support and assign it to user group Support, and a filter with categories for sales, and assign it to user group Sales.

A category defined as *Reserved for Dialler* will only be shown for agents when they receive a call from a Dialler queue it is configured for, so the Dialler categories cannot be included in a resource filter.

A resource filter containing some Enquiry registration categories does not limit what categories a user will see in the Admin Portal on page Users - Enquiry registration.

If agents answer more than 1 queue and you often need different categories per queue, we recommend configuring Categories per queue instead of using resource filters.

6.6.3.6 Pause reason

If your Puzzel solution uses different [Pause reasons](#), all agents will see all the defined pause reasons in the Agent application's status selector. If some agents should not see all the defined pause reasons, you can define a filter containing a selection of pause reasons and assign this filter to the relevant user group or users.

6.6.3.7 Service variables

Very few of your company's users should have access to the sub menu [Services – Service variables](#), where you can switch variables like e.g. Crisis message, Callback in queue etc. on and off. If you want to limit which service variables these few users have

access to, you can create a filter containing one or more variables and assign it to the relevant users.

6.6.3.8 Skills and Skill categories

Each Skill belongs to a Skill category. Some Puzzel customers have few skills, while others have hundreds of skills. In one Skill Category there might be few or many skills (max 255).

We have now added Filter input boxes for Skill name and Skill category in the *Add skills* (to profile) popup windows, so that it will be much easier to find the skills you look for in a (very) long list of skills, when you create or edit user group profiles.

If you for some reason really want to limit what skills that are shown in the *Add skills* popup window on page Users – User groups (and Users – Profile templates and Edit user page under Personal profile), you can create a resource filter containing some skills or one or more skill categories.

A user with a resource filter assigned that contains e.g. 3 skill categories, will only see skills in these skill categories in the **Add skills popup window**, in addition to the media types and other already included skills in the chosen profile.

A user with a resource filter assigned that contains e.g. 10 skills, will only see these 10 skills in the **Add skills popup window**, in addition to media types and other already included skills in the chosen profile.

On page Users – User groups and on page Users – Profile templates where the profiles are listed, all skills in all existing profiles are shown regardless of any Skill/Skill category resource filters assigned to the user, so that the profiles are shown correctly.

6.6.3.9 SMS Surveys

If you have more than one SMS Survey and not all admins with access to page SMS – Survey should see all, then you can create a resource filter containing one or more Surveys, and then assign it to admins that should see only the Survey(s) in this resource filter.

6.6.3.10 Sound File Modules

If one or more of the few users with access to [Services – Audio](#) should only see a few of your service's Sound file modules (under *Sound files in use*), you can create a filter containing selected Sound file modules and assign the filter to the relevant users.

Please note that if you want to let a user see only the sound file modules currently using sound files in one or more Categories, we recommend creating a filter based on Sound file categories instead of based on individual sound file modules.

6.6.3.11 Sound File Categories

If one or more of the users with access to [Services – Audio](#) should not see all your *Sound file categories* (and sound files in these categories), you can create a filter containing selected Sound file categories and assign the filter to the relevant users. A user with such a filter assigned will only see sound files in the defined categories in the Sound file library, and only sound file modules now using a sound file in the categories in the filter.

6.6.3.12 Statistics reports

If the users with access to Statistics should not see all reports, you can create filters containing selected reports and assign the filters to relevant users, to limit what reports the users can see.

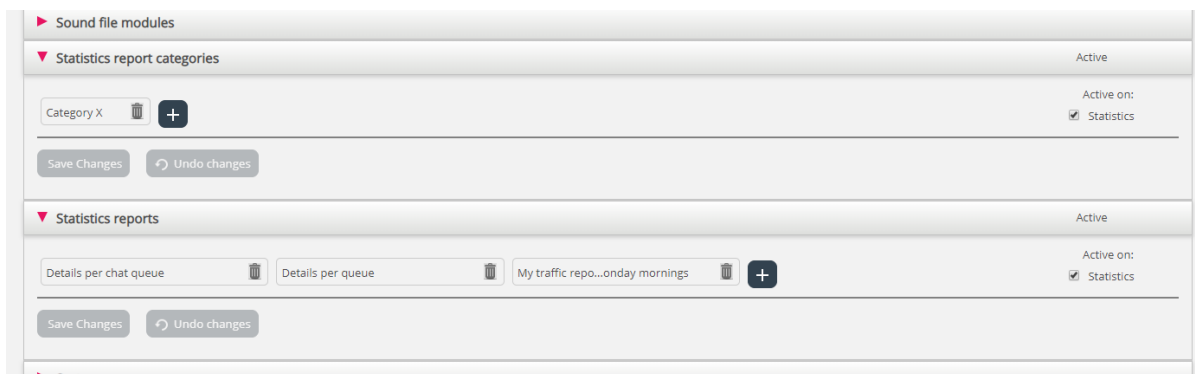
Please note that if a user has such a filter assigned and then saves a customised report, this new report will disappear when it's saved, since this new report is not included in the filter! We recommend that users with a statistics filter assigned do not have access to save customised reports to avoid confusion. Users can use Customise under Statistics without having the option to save customised reports.

6.6.3.13 Statistics report categories

Custom reports can be grouped in different Report Categories. If the users with access to Statistics should not see all custom reports but only custom reports in one or more Report categories, you can create filters containing different report categories and assign the filters to relevant users. If the user should see only some custom reports and only some standard reports, we recommend you include both some standard reports and some report categories in the filter.

- If you have defined a filter containing one or more [Statistics report categories](#) and applied this to a user, this user will see the custom reports belonging to the categories in the filter, and all standard reports.
- If you have defined a filter containing one or more [Statistics reports](#) (standard and/or custom) and applied this to a user, this user will see only the reports in this filter.
- If you have defined a filter containing [Statistics report categories](#) AND [Statistics reports](#), and applied this filter to a user, this user will see the custom reports

belonging to the categories in the filter and all standard and custom reports in the report filter.



6.6.3.14 Time modules

If you have more than one Time module and not all users with access to sub menu [Services – Time](#) should have access to all your Time modules, you can create a filter containing one or more Time modules and assign it to relevant users.

6.6.3.15 User Groups

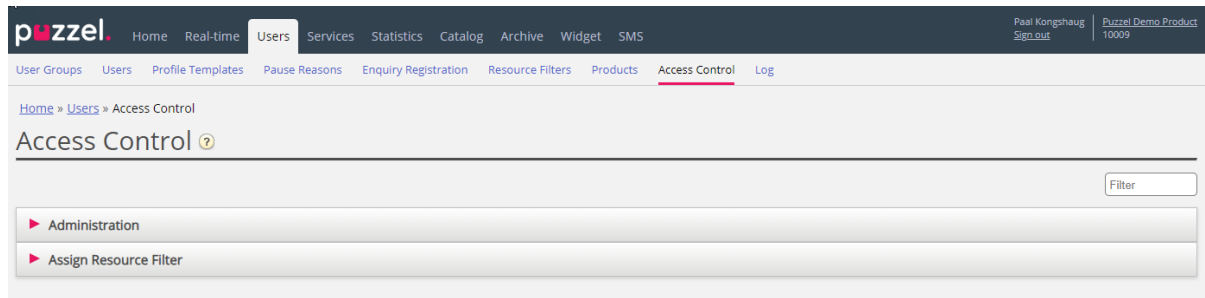
A filter in this area can be active for Puzzel in general, Statistics and/or Archive.

Active on:

- *Puzzel in general: Check here if you want users with this filter assigned only to see agents in the chosen user groups in the Administration Portal's Real-time User group view, in Ticker, in the Users tab and in the agent application where you search for agents. A user group filter will also affect what users and tasks that can be seen by an agent in the Scheduled tasks tab.*
- *Statistics: Check here if you want users with this filter assigned only to see the agents in the chosen user groups in the Statistics reports that group traffic per user group or agent, e.g. Details per user group per queue and Details per agent.*
- *Archive: Check here if you want users with this filter assigned only to see requests answered by agents in the chosen user groups in the Archive*.*

* Please note that one incoming call may have been connected to different agents on different system queues due to call transfer. If an incoming call includes an agent conversation the user should see, the whole call's General information will be shown, but the user will not have access to call recordings from queues/agents he should not see.

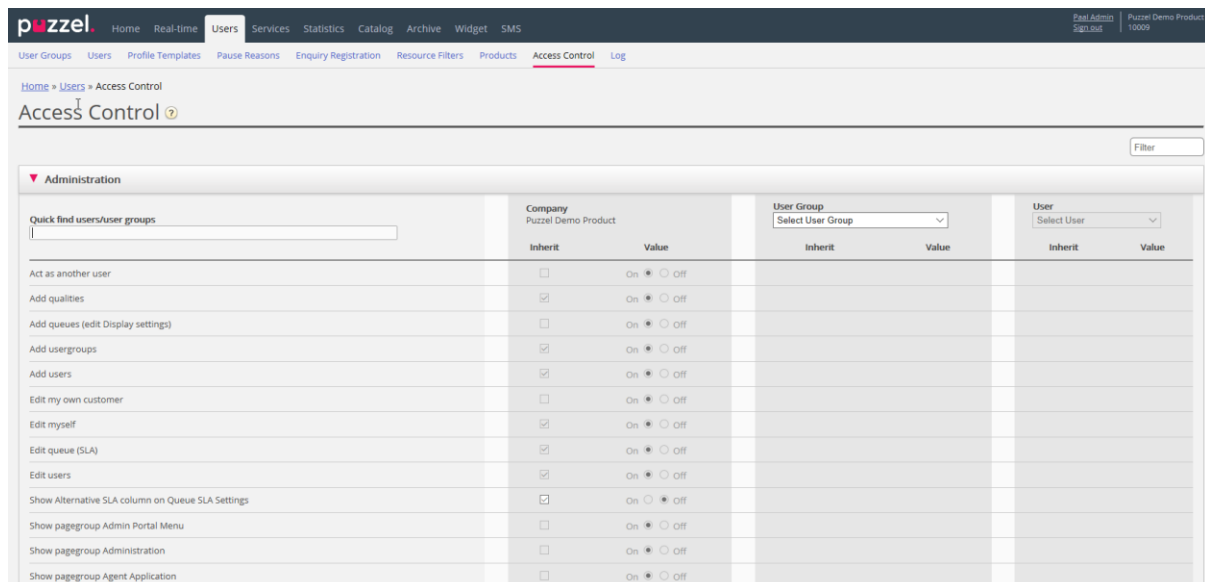
6.7 Access Control



Access control consists of 2 parts: Administration and Assign resource filter.

6.7.1 Administration

The few users with access to see accordion *Administration* on page Users - Access Control can configure access rights for other admin users.



If you have access to Administration, you will only see the Admin properties that are ON.

The most important properties under Administration:

- **Edit my own company:** This is the administrator “main switch”. If OFF for a user, this user will not have access to the Admin Portal main menus *Users*, *Services*, *Widget* or *SMS* even if *Enable menu Users/Services/Widget/SMS* is ON. When a new Agent user group is created, *Edit my company* is set to OFF and *Enable menu Real-time/Statistics/Catalog/Archive* is set to OFF for this new user group.
- **Show pagegroup xxxxxxxx:** If not all admin users with access to page *Users – Products* should have access to the same accordions (aka pagegroups), this can be changed by adjusting these properties for different user groups/users.
- **Add usergroups:** Default ON. If Off for a user, this user can not add new user groups on page *Users – User groups*.

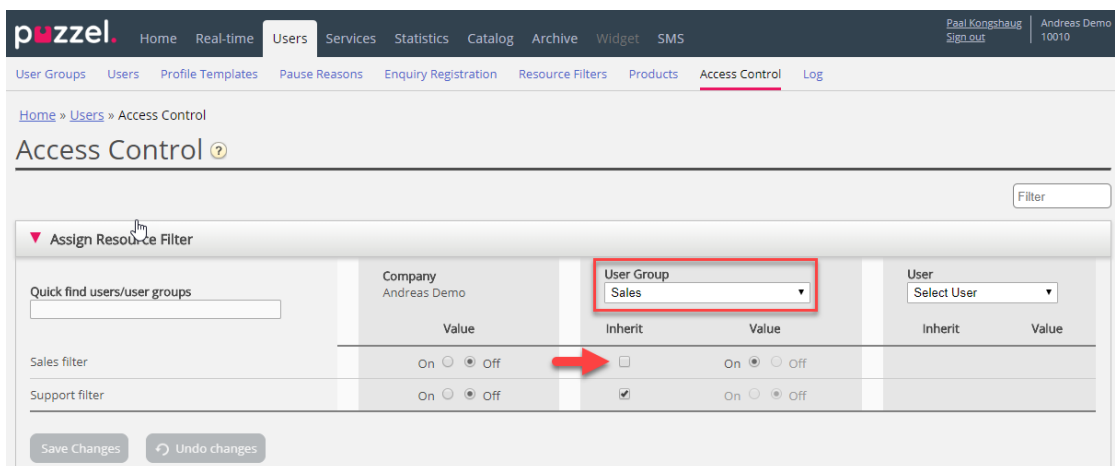
- **Add users:** Default ON. If Off for a user, this user can not add new users on page *Users – Users*.
- **Act as another user (Wallboard).** Default ON. If Off for a user, this user cannot configure the Wallboard for other users on page *Real-time - Wallboard*.
- **Show Display queue settings** (on page *Services – Queues*): Default ON. If Off for a user, this user cannot see accordion *Display queue settings*.
- **Edit Display queues:** Default ON. If Off for a user, this user cannot add, edit or delete Display queues.
- **Show System queue settings** (on page *Services – Queues*): Default ON. If Off for a user, this user cannot see accordion *System queue settings*.
- **Edit System queue settings:** Default ON. If Off for a user, this user cannot change system queue configurations.
- **Add system queue:** Default OFF. If On for a user, this user can add and delete system queues (and belonging skill) on page *Services - Queues*.
- **Save custom statistics reports:** Default ON. If Off for a user, this user can still customize reports, but not save new custom reports or save changes in existing reports.
- **Edit property values for other users:** Default ON. If Off for a user, this user cannot change property values for other users on page *Users – Products*.
- **Show profiles on Edit user page:** Default ON. If Off for a user, this user will not see profiles on the Edit user page.
- **Show Group numbers ('Unblockable agents'):** Default OFF. If ON for a user, this user can see, edit and Add Group numbers.

6.7.2 Assign Resource Filter

In addition to defining a resource filter (on page *Users – Resource filters*) you need to assign the filter to one or more user groups (or to single users).

If you assign a filter to a user group, all users in this user group inherit the filter. Users without filters assigned to them have access to all elements (rows) in Puzzel.

If you assign a filter to a specific user, and then move this user to another user group, this user keeps the assigned filter also after the move.



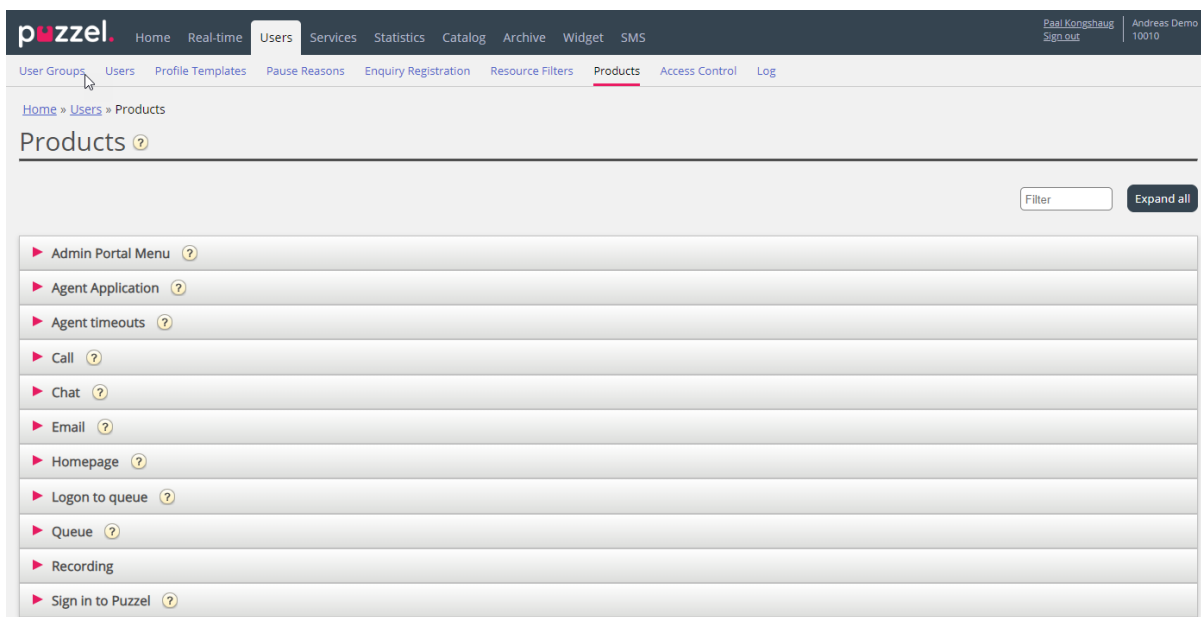
In the example above, user group *Sales* has the resource filter “Sales filter” assigned.

Please note that you cannot set value OFF for a user group (or a single user) if the value on the Company level (or user group level) is ON.

In the user list (*Users – Users*) you can see a filter symbol (with the filter name(s) as tooltip) next to agents that have a filter assigned.

6.8 Products

On this page administrators can configure different types of product settings for your Puzzel solution. Within each product area there are different settings called properties. Most customers see some of these product areas (accordions):



Some customers see several product areas, and others see few.

Which product areas (accordions) that are shown for a user on this page is defined on page *Users – Access Control* under *Administration*.

6.8.1 The inheritance system and property types

Configurations in the Product areas are inherited from the Puzzel system to your Company, from your Company to your user groups, and from a user group to the users. You can change the value (ON/OFF or a specific value) for a **property** by unticking the *Inherit* box and set your own value for your company, for a specific user group and/or for or a specific user.

The screenshot shows the 'Agent timeouts' configuration page. It features a search bar for users and a table with columns for Company, User Group, and User. The 'Company' column is expanded to show 'Intelcom Connect Demo Product'. The 'User Group' column shows a dropdown menu. The 'User' column shows a dropdown menu. The 'Busy timeout' row is highlighted, showing a checked 'Inherit' box and a value of '15' in the 'Value' column. Red circles with numbers 1, 2, and 3 are placed over the 'Inherit' boxes for Company, User Group, and User respectively.

1. **Inherit on Company level** – If your solution uses a system default value for a property (e.g. Busy timeout), the inherit box will be ticked on Company level. If you use a specific value, the Inherit-box will not be ticked (and this specific value is inherited to all your user groups).
2. **Inherit on User Group level** – By default, all user groups inherit the values from the Company level (whether the company values are inherited from system or set specific for your company). If you would like a specific user group to have different values than the rest of the company, you can untick the *Inherit* box for the user group and configure different values.
3. **Inherit on User level** – By default, all users will inherit the configurations from the user group they belong to. If a user should have different values than the user group, choose the user, untick the inherit box and set the desired values you want for that user.

Please note that if you for a single user uncheck *Inherit* and set a specific value for a property (e.g. set *Wrap-up timeout phone* to 60 sec), and you later **move** this user to another **user group**, this user's specific value for this property is kept. In general, we do not recommend adjusting property values on single user level unless it's really needed.

Example:

System default for *Busy timeout* is 15 seconds and the company has inherited the value:

	Company		User Group		User	
	Inherit	Value	Inherit	Value	Inherit	Value
Quick find users/user groups						
Company		Intelecom Connect Demo Product		Select User Group		Select User
Busy timeout	<input checked="" type="checkbox"/>	15				

If your company wants another value for Busy timeout, untick *Inherit* and enter your own value, e.g. 30, and save.

	Company		User Group		User	
	Inherit	Value	Inherit	Value	Inherit	Value
Quick find users/user groups						
Company		Intelecom Connect Demo Product		Select User Group		Select User
Busy timeout	<input type="checkbox"/>	30				

Now 30 is your Company value that is inherited to all you user groups.

If you want one specific user group (e.g. Agents) to have another value than 30, first select the user group:

	Company		User Group		User	
	Inherit	Value	Inherit	Value	Inherit	Value
Quick find users/user groups						
Company		Intelecom Connect Demo Product		Agents		Select User
Busy timeout	<input type="checkbox"/>	30	<input checked="" type="checkbox"/>	30		

Then untick *Inherit* for the user group and enter a new value (e.g. 20):

	Company		User Group		User	
	Inherit	Value	Inherit	Value	Inherit	Value
Quick find users/user groups						
Company		Intelecom Connect Demo Product		Agents		Select User
Busy timeout	<input type="checkbox"/>	30	<input type="checkbox"/>	20		

Remember to save. Now 20 is the specific value for the user group Agents.

If you want one user to have a different value than the user group, select the user group (e.g. Agents) and then the user:

	Company		User Group		User	
	Inherit	Value	Inherit	Value	Inherit	Value
Quick find users/user groups						
Company		Intelecom Connect Demo Product		Agents		Martin
Busy timeout	<input type="checkbox"/>	30	<input type="checkbox"/>	20	<input type="checkbox"/>	10

Then untick *Inherit* for the selected user, enter a new value and click *Save changes*.

Different property types

The most important property types are:

- a) ON/OFF properties that are visible for you on the company level only if turned ON by Puzzel, e.g. *Enable menu Services – Call flow*. For a property with this type (when ON for your company) you can uncheck *Inherit* and set it to OFF for a user group. If OFF for a user group, it cannot be turned ON for a user in this group. If it's inherited ON for a user group, you can uncheck *Inherit* and select OFF for a user in this group.
- b) ON/OFF properties that are visible also when OFF on company level, e.g. *Automatic logoff at midnight*, *Forced Enquiry registration* and *Two-factor authentication*. For a property of this type, you can turn it ON for the company level and set it OFF for selected groups, or turn it OFF for the company level and set it ON for selected groups, and also adjust value on single users.
- c) Text/number properties, e.g. *Possible to extend wrap-up with seconds* and *Block phone if number of written requests is greater than*. For a property of this type, you can set the desired value on customer level, on user group level and user level if you want.

6.8.2 Admin Portal Menu

If you want to change what menus or sub-menus that an admin user group or a specific admin user should see in the Administration Portal, you can select the User group/User and un-tick *Inherit* to turn OFF a property. You cannot see or turn ON menu properties your company does not have access to.

If a menu property is OFF for a user group, you can turn it ON for single users.

If you turn OFF a main menu property (e.g. *Enable menu Services*) for a user group or user, you do not need to turn OFF the belonging sub-menu properties that are ON.

Agent user groups will only have agent access rights (*Edit my own company* is OFF), so if an agent user logs on to the Administration Portal, he/she will only have access to menu Home page. See [Add User Group](#)

6.8.3 Agent Application

There are several properties that control how things should appear in the Agent application. Some important ones:

- **Allow agent to Schedule Calls:** Default OFF. If set to ON, agents will be able to order Scheduled calls from the agent application and see their own rescheduled Dialler calls.
- **Allow agent to schedule task from request,** default OFF. If ON, the agent can create a Scheduled task from an ongoing task or call. (If set to ON for a group, this group should also have access to the Scheduled task (calendar) tab.
- **Enquiry Registration - Forced:** If you use Enquiry registration and you want to try to force agents to register after each call, set this property ON for relevant user groups/agents. When ON, agents can't click *Ready* while in status wrap-up if a registration is not done. Wrap-up timeout should be quite long when using [Forced enquiry registration](#).
- **Enquiry Registration - Set Ready after:** If you use Enquiry registration and set this property to ON, the agent will automatically be set to *Ready* if he/she clicks *Register* while in Wrap-up, and if a registration is done while on a call, there will be no wrap-up after the call.
- **Enquiry registrations - Allow manual:** Not supported in agent.puzzel.com! If you use Enquiry registration and you want agents to be able to generate Enquiry registration tabs by clicking '+', set to ON. Please note that such registrations will NOT be linked to calls/chats in the Archive, nor in statistics and raw data.
- **Enquiry registration - Allow Comment:** If you use Enquiry registration and you want agents to be able to add a free text comment, please set to ON.
- **Possible to extend wrap-up with seconds:** Set a value (e.g. 30 or 120) if agents should be able to extend wrap-up when needed. An 'extend wrap-up' button with the defined number of seconds appears in the status part of the Agent application while in status wrap-up, and the agent can click on this button one or more times to increase the remaining wrap-up time.
- **Scheduled task subjects:** Default empty. If you define subjects separated by “;” the Subject input field in Add/Edit Scheduled task will be a list box with these subjects instead of a free text input field.
- **Softphone - allow:** ON if your company has access to use the Puzzel Softphone. Can then be turned OFF for user groups/users that should not have access to use the softphone. An agent that have access to use the Softphone can choose between Softphone and enter an “external” phone number.
- **Softphone - use:** Only used for agent.puzzel.com. Agents that have selected (in their settings) to use the softphone will have value ON.
- **Softphone - Auto answer:** If turned ON, inbound calls to the agent's Softphone will be answered automatically after <1 second (a short ring tone is played). Make

sure agents using auto-answer always have a headset on when logged on to queue. When an agent makes an outbound call or receive a Dialler Power/Progressive/Predictive call, the softphone will auto-answer even if Auto-answer is not set to ON.

- **Show KPI alarms in Agent application:** Default ON. If turned OFF, a triggered KPI alarm (yellow row) will not be shown in the Agent application’s Queue overview.

6.8.4 Agent Timeouts

An agent in status *Busy* / *No answer* / *Wrap-up* will return to status *Ready* when the agent timeout is over, or when the agent clicks *Ready*.

	Company		User Group		User	
	Inherit	Value	Inherit	Value	Inherit	Value
Quick find users/user groups	Andreas Demo		Select User Group		Select User	
Busy timeout	<input type="checkbox"/>	10				
No answer timeout	<input type="checkbox"/>	20				
Wrap-up timeout phone	<input type="checkbox"/>	600				

The different timeouts:

- **Busy timeout** - Agent status will change to *Busy* for X seconds when a call is set up to the agent and Puzzel receives a busy signal, or if the agent clicks Reject when a call/written request is being offered. The agent will not receive a new request before the Busy timeout has ended or agent has clicked Ready.
- **No answer timeout** – Agent status will change to *No answer* for X seconds if a call (chat/email/social request) is offered to the agent and he/she does not do anything within the pre-defined “offer” time (Offer call/chat/email to agent – sec). The agent will not receive a new request before the No answer timeout has ended or agent has clicked *Ready*.
- **Wrap up timeout phone** – How long the agent should have status Wrap-up after he/she has hung up the phone. We strongly recommend that this value be set to at least 30 sec. If most agents need 10-60 seconds wrap-up, but sometimes they need 5 minutes, we recommend that wrap-up be defined to 5 minutes, since agents should click *Ready* when they are finished with wrap-up. Alternatively, set the predefined Wrap-up short (e.g. 30-60 sec) and allow agents to extend wrap-up (see Products – Agent application).
The time spent in status wrap-up is reported in statistics and in Ticker (and AHT includes wrap-up). We do not recommend defining a Pause reason called e.g. “extra wrap-up”, since the time in a pause reason is not included in the reported

Wrap-up time (nor AHT) in Ticker and Statistics.

Please note you can also pre-define a **wrap-up time per phone queue** on page *Services – Queues* under [System Queue Settings](#). If an agent answers a call from a queue with a predefined wrap-up time, the queue's wrap-up time is used instead of the wrap-up pre-defined on this agent.

6.8.5 Call

The most important properties under Call are:

- **Offer call to agent – sec:** When the queue calls the agent (on behalf of a caller), how many seconds should it ring on the agent's phone before the queue aborts and looks for a new agent. Default 30 seconds.
- **Outgoing call display number (CLI shown to destination):** Number displayed as CLI (Calling Line Identity) to the called party when agent makes outbound call. If an outgoing call display number list is defined and agent has selected a number from the list, the selected number will be stored here. If nothing defined (and agent has not selected a number from the defined number list), the number the agent logged on with will be used.
- **Outgoing call Display number list:** A semicolon separated list of numbers the agent can choose from. The selected number is shown for the called party when agent makes an outgoing call. If you want "Logon number" to appear in the list, please add the variable "\$system_last_called". You can add a description for each number in the list. The syntax for this is: number|description;number|description. If the agent has selected a number from the list, the selected number will be stored in property Outgoing call Display number. Please note that you may only use your own phone numbers!
- **Originating number shown to agent:** If defined, this number is shown instead of caller's number when offering a call to the agent. This property is not visible for customers, only for Puzzel support

6.8.6 Chat

You can configure various properties for Chat and written requests here, e.g:

- **Allow to adjust max concurrent written requests:** Default OFF. Set to ON if the agent should be able to adjust max concurrent written requests.
- **Maximum total concurrent written requests (max 8):** Maximum number of concurrent written requests that can be allocated to the agent.

- **Maximum total concurrent written requests (max 8) - adjusted:** Default 0 (=not defined) on company level. If agents are allowed to adjust, the current value for each agent is shown here. A defined value on company or user group level will be used for agents that have not yet changed the value for Max total concurrent written requests in the agent application.
- **Maximum concurrent chat/social requests:** Default = 0 = not defined, which means that the value for Max total concurrent written requests is used. If agents are allowed to adjust the max number of concurrent written requests, the current value for each agent (user) is shown here. A defined value on company or user group level will only be used for agents that have not yet changed the value in the agent application
- **Maximum concurrent email/etask requests:** Default 1. If agents are allowed to adjust the max number of concurrent written requests, the current value for each agent (user) is shown here. A defined value on company or user group level will only be used for agents that have not yet changed the value in the agent application
- **Block phone if number of written requests is greater than:** Agents can use profiles that enable them to answer requests from multiple channels (chat, phone, email and/or social). Some agents might be able to handle one or more written requests and still answer an incoming call, while other agents should not receive phone calls while working with chat/written requests.
 - With *Block phone if number of written requests is greater than 0*, the agent can receive a phone call only if no written request is ongoing.
 - With *Block phone if number of written requests is greater than 1*, the agent can receive a phone call only if 0 or 1 written request is ongoing.
 - When an agent has one or more ongoing written requests and phone is not blocked, the agent's status will be shown as *Ready (n)*.
 - When the agent's phone is blocked (due to >X ongoing written requests) the agent's status will be shown as *Busy (n)*.
 - The agent can make an outgoing call even if his phone is blocked (*Busy (n)*) for incoming calls.
- **Allow to send attachments:** Default OFF. Turn ON if the agents should be able to send attachment to the customer in the chat. If an agent uploads a file that customer could download, this file is temporarily stored, so the link shown in the chat transcript sent by email and shown in Archive will only work for a short time.

- **Automatic welcome message when agent accepts:**

The text defined here will be presented for the chatter when the agent accepts the chat, but only if the chatter has not yet written anything. System variables like \$agentFirstName and \$agentFullName can be used. Example:

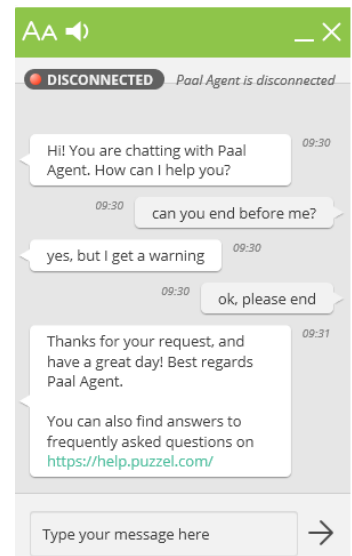
```
Hi! You are chatting with $agentFirstName. How can I help you?
```

- **Automatic goodbye message when agent disconnects chat:**

If a message is configured, this message will be shown for the chatter after the agent disconnects, but only if the chatter has not yet ended the chat. If the agent tries to close a chat dialog tab in the Agent application before the chatter has ended, the agent gets a warning (“*The person you are chatting with is still connected. Are you sure you want to close?*”) Example text:

```
Thanks for your request, and have a great day!  
Best regards $agentFirstName. [br][br]You can  
find answers to frequently asked questions on  
[url]https://help.puzzel.com/[url]
```

Since the agent has disconnected, the chatter can not write text in the input field.



- **Pin chat intro field (if available):** If ON, the initial text from the chatter (name etc) is “pinned” in the upper part of the chat. Each agent can turn on/off “Pin chat intro message”, and the current choice is shown here.
- **Enable Chat Survey:** If chat survey is configured on your web page, the survey is active only if this property is ON.
- **Use chat nickname instead of queue name in tab header:** You can configure what your agents see as Dialog tab header on the chat tabs in the Agent application. They can see *from what queue the chat is coming* (e.g. Chat sales) or the *name of the chatter* (e.g. David). If agents can answer more than one chat at a time, we recommend showing nickname. If agents can answer only one chat at a time and they answer several chat queues, showing queue name might be useful.
- **Chat nickname:** Chat nickname is a nickname for the agent. If it’s not defined, the agent’s Firstname and Lastname is shown to the chatter. Chat nickname is useful if you do not wish to display the full identity of your agents. The defined agent nickname is presented to the chat customer. You can define the same nickname

for all agents in a user group, or you can use the variable `$agentFirstName` if you want to display the agents real firstname for your chat customers.

- **How long (seconds) before a chat tab should blink when new chat messages is not read:** If an agent is responding to various chats at the same time he/she will have several chats tabs open. Every time a chatter in a non-active tab sends a new a message the agent will be notified in the chat tab. You can configure that the chat tab will start blinking if the agent has not read the message within X seconds.
- **How long (seconds) before a chat tab should give alarm when there is no activity:** If the chatter has not written anything for X seconds you can configure that the agent will be notified in the chat tab header.
- **Offer chat to agent – sec:** You can configure for how long agents should be offered a chat. Default is 30 seconds. If the agent does not accept the chat within these seconds, the chat request will be offered to another agent. An agent that does not answer an offered chat will not receive a new chat before the No answer timeout is over, or before status is changed from No answer to Ready.
- **Information to customer - \$text01 (-20):** Here you can define one or more variable texts that could be used in the web form for customers wanting to start a chat with your agents. See more details in the document describing the Puzzel Chat form (under 'Knowledgebase' on help.puzzel.com).
- **Insert text 1 (-40):** The 40 Insert text box fields are used for *Predefined messages* for your agents that will appear in your agents' chat window. To create a predefined message, simply write it in one of the *Insert text boxes*. The format is `Title;Message.`

The Title is the word(s) appearing in the predefined message popup window in the Agent application, and the Message will appear in the chat when the agent selects one of the Titles.

To add a hyperlink into a predefined text box simply use this code for your link.

```
<a href="url">Link
```

Examples:

- 1) Product Page;Please check out our

```
<a href="https://productdemo.puzzel.com/product/products/">Product Page</a>
```
- 2) Good bye;Thanks for your request. Have a nice day!



- **Enable captcha on chat:** [Captcha](#) can be configured on request. (Only Puzzel support can see this property). If captcha is turned on, the user wanting to start a chat needs to “prove he/she is human”. Puzzel generates a random number (a validation code) and presents it on the web-page, and the user must enter the number into an input field before a chat can be started.
- **View chatters browser activity in Dialogs:** If your company's web page that offers Puzzel chat is configured to track users browsing history, this history will be shown for the agent in the chat tab.
- **SMTP Alternative host for sending Chat log:** When a chat ends, the end customer can ask that the chat log is sent to his email address. The chat log is then sent from Puzzel’s email server. If you want this email to be sent from your own SMTP server instead, you can register the alternative SMTP host’s **server name**, **username**, **password** and a **from address**, so that Puzzel can use this SMTP host, and then turn on “Use alt. SMTP host for sending Chat log”. Please note that if you choose to do this, the chat log is transferred from Puzzel’s web server to your SMTP host using TLS just after each chat ends, but it only works when your host is available.

6.8.7 Email

Any written request from any system (email, CRM etc) that can be identified by a URI can be queued and distributed in Puzzel as media type email. The system must send information about the request (From, To, Subject, Uri) to Puzzel (webservice ‘RequestAdd’) so that Puzzel can queue and distribute the request to an agent. Puzzel also offers an Exchange connector. Scheduled task also uses media type email. Several properties affect how media type email works in the Agent application, e.g.:

- **Allow multiple parallel emails:** Default ON, which means that requests with media type Email is allocated to agent in the same way as chat and social media requests. Do not turn OFF (to allocate email as phone calls), since this property will be removed and ignored later in 2020.
- **Offer email to agent – sec:** How long agents should be offered email. Default is 30 seconds. If an agent does not accept an offered email within these seconds, the email request is removed from Agent application and offered to the next ready agent.
- **Allow e-mail transfer to queue:** If agents should be allowed to transfer an accepted email to another queue (default ON). Might be useful if an email is sent to the wrong email address/email queue.
- **Allow e-mail transfer to agent:** If agents should be allowed to transfer an accepted email to another agent (default OFF). Might be useful if some emails to a queue can only be answered by certain agents.
- **Allow e-mail transfer to personal queue:** If agents should be allowed to put an accepted email into his personal queue, to reopen and finish it later (default OFF).

If you want changes in your email configuration in Puzzel, please contact our support.

6.8.7.1 About email transfer and Put email in personal queue

An agent that transfers an email should write a comment in the agent application to the next agent. If an agent transfers an email to another agent, the email is shown in this new agent's Personal queue. The email is actually put in a transfer queue, but it's tagged with the correct agent's name. This transfer queue should have a [KPI alarm](#) (if wait time > x hours), so that all agents and supervisors can see if emails are waiting too long in the transfer queue. All agents can pick emails (that have waited too long) from the transfer queue.

If you allow your agents to put an accepted email in personal queue, the agents can work on the same email several times (before sending an answer to the end-customer and clicking Finish). The agents are given credit for all the time he/she spends working on an email, but please note that this will have impact on the Ticker Agent and the agent statistics! (It will look as if the agent answered several emails and used shorter time per email, than if he did not put emails in his personal queue).

Agents will see the Email Personal queue and the Email transfer queue in the Queue overview if they see all queues, but if it's configured that they only should see Relevant

queues, you need to include the skills email transfer and email personal (with level=0) in the profile the agents use when answering email.

6.8.8 Home Page

Here you can manage what key values to show in the grid on the Home Page. As default, 4 key values are shown, and they appear in a 2x2 grid. If more than 4 key values are chosen, the grid automatically converts to a 3x3 grid.

You can also configure that some users should not see the Support Messages Puzzel publishes on the Homepage by setting this property to OFF for your company or selected user groups.

6.8.9 Logon to Queue

The most important properties here are:

- **Automatic logoff at midnight:** Default is off. If turned on, agents that are logged on to queue (paused or not) at midnight will be logged off.
- **Automatic logoff after noanswers:** Default is off (=0). If a value greater than 0 is set, e.g. 2, the agent will be logged off after 2 consecutive calls offered to agent (if ringing timeout happened). If the agent is logged on to queue with Softphone in agent.puzzel.com and the agent's Puzzel browser is not available (e.g. PC sleeping/off or browser closed), a call allocated to this agent will result in error, not ringing time-out. If the agent is logged on with a number belonging to an external softphone (e.g. Skype or Cisco) and this softphone is not available, Puzzel will probably also here receive error and not "ringing". Please note that Automatic logoff after noanswers doesn't work for chat/written requests.
- **Automatic logoff after errors:** Default is 5. With value 5 (or X), the agent will be logged off after 5 (X) consecutive calls allocated to the agent where Puzzel received error signal. Please note that if an error in the network causes Puzzel to receive error instead of ringing when calling an agent, this will also log off agent, but in this case the calls don't get through to the agent anyway. If set to 0 (not recommended), the agent will not be logged off if he is logged on and lots of calls are allocated to the agent and all calls result in error, maybe because the agent left the seat (for the day) without clicking Pause/Log off.

6.8.10 Queue

These properties affect how queue and agent information is shown. The most important ones are:

- **Show agent details' action column:** If ON, the user can log on/off agents from Agent Details in the Administration portal.
- **Allow delete request in queue:** Set to ON if the user should have access to delete callbacks and emails in queue and ongoing requests (for logged off agents).
- **Enable agent to Pick from queue:** Set to ON if agent should be able to pick request from queue in the Agent application.
- **Show in Agent's queue overview: ...:** If this information should be visible in Queue overview in the Agent application
- **Show in Agent's agent details: ...:** If this information should be visible in Agent details in the Agent application
- **Show in Agent's queue details: ...:** If this information should be visible in Queue details in the Agent application.
- **Show only active queues:** If ON, the user will only see queues he/she is logged on to. (If a filter limits what display queues the user will see and Show only active queues is ON, the user will see active queues event if they are not in the filter)
- **Show only relevant queues:** If ON, the user will only see queues he/she has skill on. (If a filter limits what display queues the user will see and Show only relevant queues is ON, the user will see relevant queues even if they are not in the filter)
- **Show link to agent details and queue details:** If ON, the user can open queue details and agent details from the Queue overview in the Administration portal.
- **Show in Queue overview: Scheduled callbacks:** In ON, scheduled callbacks are shown in Queue overview.

6.8.11 Recording

Properties related to call recording and access to call recordings in the Archive.

- **Allowed to play Recordings from Archive:** If OFF, the user cannot play recording or see chatlogs in Archive. If this property is off, the user cannot download/delete recording even if download/delete property is ON.
- **Allowed to download Recordings from Archive.** Default OFF.
- **Allowed to delete Recordings from Archive:** Default OFF. If ON, the user can delete recordings and chatlogs from Archive.
- **Censor recordings button visible:** If agents should be able to Censor an ongoing recording in the agent application.
- **Manually recording allowed:** If agent should be able to start a call recording.

- **Recording of conversations Forced on agent:** If ON, all calls to agent(s) (in this user group) is recorded (unless the caller denied call recording).
(Recording can also be configured to be “forced” on queue)

If a user is given access to see accordion *Recording* on page *Users – Products*, this user also has access to turn on/off recording per system queue on page *Services – Queues*.

A description of what is recorded during a call (e.g. how the consult part is treated) can be found here: <https://help.puzzel.com/hc/en-us/articles/208234285-Call-recording>

6.8.12 Sign in to Puzzel

Here you can change values for these properties related to sign in to Puzzel:

- **Show Access Log:** If ON, the user(s) can see the *Access log* on page *Users – Log* in the Admin Portal.
- **Show Change Log:** Turn OFF if the user(s) should not see the *Change log* on page *Users – Log* in the Admin Portal
- **Strong password required:** If turned ON, the user’s password must be at least 8 characters and contain at least 1 lower-case letter (a-z), 1 upper-case letter (A-Z), 1 number (0-9) and 1 special character (\$ @ € £ ! % * ? & = ,)
- **Two-factor authentication – email:** Turn ON for user groups that should use 2-factor authentication by email to log on. Verify that these users have defined email address in Puzzel.
- **Two-factor authentication – sms:** Turn ON for user groups that should use 2-factor authentication by SMS to log on. Verify that these users have defined mobile number in Puzzel.
- **How many days a password is valid:** Default 0 which means valid forever. Set a value (e.g. 90) if you want to force the users to change password at fixed intervals. If a user signs in when the password has expired, the sign in will fail and the user must order a one-time password to define a new password. Verify that the users have email address or mobile phone number defined in Puzzel before setting a value here, so that the users can receive one-time password! See article “How to force users to change (to a stronger) password?” on help.puzzel.com.
- **IP address Allow list:** If you want to limit from what IP addresses your users should be allowed to log on to Puzzel, you can enter IPv4 addresses/ranges that are allowed. If no addresses are defined, users can log on from any IP address.
- **Web session timeout (in sec):** Default is 43200 sec (=12 hours). If a user is signed in longer than the defined timeout, the user will be signed out. For the

Wallboard user group, you can set the timeout to e.g. 7 or 31 days so that you don't need to sign in the wallboard users each morning.

- **SSO: List of external authentication providers.** If you want your agents to have single sign-on to agent.puzzel.com using Azure credentials, you must add 'azure|azure' here. Then you must upload a list with the users' external id on page Users – Users. For Salesforce, enter “Salesforce|Salesforce”
- **SSO: Log user off from external Identity Provider.** If turned ON, the user is signed out from Azure (in the browser) when the user has signed in to Puzzel. If users have personal computers, it should be safe to have this property OFF.
- **SSO: Reject user to sign in with Puzzel username.** Default OFF. If turned ON, the user can not sign in to agent.puzzel.com with the Puzzel username/password.

6.9 Change Log/Access Log

6.9.1 Change Log

The Change Log gives you an overview of changes made for the last **3 months**.

A list of the most recent changes made will appear. You can search for changes made in a specific module, during a specific time period and/or done by a specific user.

Date and time	Module	Name of module	Change	Audited by
11.01.2018 11:41:46	Property	Two-factor authentication: SMS	Property on user paal has been updated to true	Paal Kongshaug (paal)
11.01.2018 11:40:28	Enquiry Registration	Technical issues	Enquiry registration topic PC has been added	Paal Kongshaug (paal)
11.01.2018 11:38:28	Profile	Global 2	Profile has been updated	Paal Kongshaug (paal)
11.01.2018 11:38:28	Profile	Global 2	Profile has been added	Paal Kongshaug (paal)
11.01.2018 11:38:28	Usergroup	Test-Agents	Usergroup has been updated	Paal Kongshaug (paal)

The change log includes the most important changes. What changes that are covered in the log can be seen in the drop-down menu in the Module field:

- *Archive subscription (changed storage time)*
- *Chat config*
- *Dialler*
- *Display queue*

- System Queue (e.g. SLA change)
- Enquiry registration
- Filter
- KPI alarm
- Profile
- Property
- Request (e.g. request deleted from queue)
- Service variable
- Services
- Sound file, Sound category and Sound file in service
- Time module
- User account and User group
- User status (agent log on/off/pause done by admins)
- Widget Tab (which tabs that are enabled/disabled in agent.puzzel.com)

6.9.2 Access Log

The Access log is shown below the Change log for users that are given access to see it (Users – Products – Sign in to Puzzel – Show access log).

Date and time	User Name	Client Type	Operating System	Browser	IP Address	Login status
15.10.2018 15:48:02	Paal Kongshaug (paal)	Admin	Windows 10	Chrome 69.0	193.69.112.242	Ok
15.10.2018 14:25:41	Andreas Wallin (anwa)	Agent 0.7.0	Windows 10	Chrome 69.0	193.69.112.242	Ok
10.10.2018 07:51:51	(yavor.angelov@puzzel.com)	WebClient	Windows 10 64-bit	Chrome 69.0	62.92.89.227	Failed (unknown username)

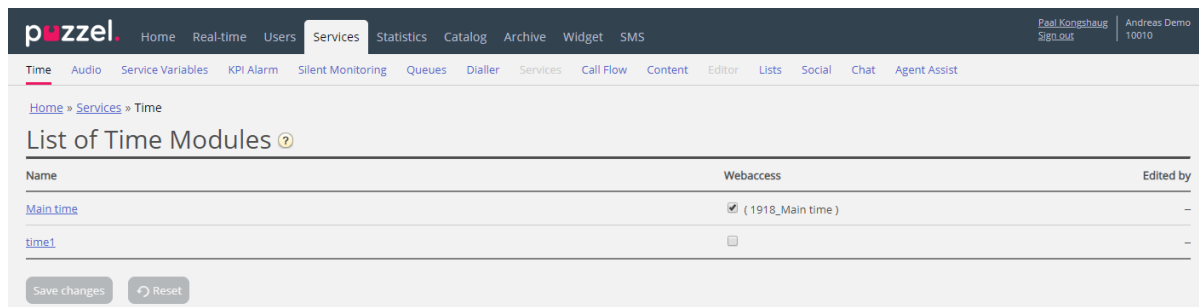
The Access log initially shows the 20 most recent sign in attempts to Puzzel (not logon to queue). You can search for sign in attempts with different search criteria like User name, Client type (e.g. Agent, Admin, PuzzelApp), Login status (OK, Rejected) and IP address. For each sign in attempt to Puzzel with your customer number, the system stores the timestamp, username, OS, browser, the source IP address and the result (ok or failed).

Sign in attempts are stored for **14 days**.

7 Services

7.1 Time

Here you can find the time modules in your solution that you can make changes to.



7.1.1 Local Time module vs Shared/Bound Time module

There are 3 types of Time modules

1. **Local** time module: The default. A local Time module has its own opening hours and exits, and is shown both in the Admin Portal and in the Call Flow configuration.
2. **Shared** Time module: Shown in Admin Portal only, never shown in Call Flow configurations. A Shared time module has 1 or more time modules *bound* to it. You can have 0, 1 or more Shared time modules.
3. **Bound** Time module: Shown in Call Flow configurations only, never shown in the Admin Portal. Each bound time module uses the opening hours and exits defined in a referred Shared Time module.

A *Shared Time module* stores a **reusable set of exits and connected time entries** in one module. This means that you can use the same “opening hours” several places in the Call Flow without needing to create and maintain the same opening hours in several different Time modules.

You can create a Shared time module by converting a local time module to be shared. Inside the *Basic* tab of the Time module, you will see the “*Convert to shared Time module*” button.

When you have created a Shared time module, you can choose to **bind** one or more other ‘empty’ (new) local time modules to the shared one, so that these will be **bound**. (In the Basic tab, you will see a “*Bind to shared Time module*” button.)

You can later choose to *unbind* a *bound* time module so that it becomes a local time module (again).

If you have a Shared time module, it is listed with postfix '[shared]' on page Services – Time, and you can adjust the opening hours here, but time modules bound to a shared (if any) are not listed. All local Time modules are listed here.

7.1.2 Modifying a Time Module

If you want to make changes to a (local or shared) time module, click on the module's name to open this time module's details. From this page you can add, edit or delete time periods.

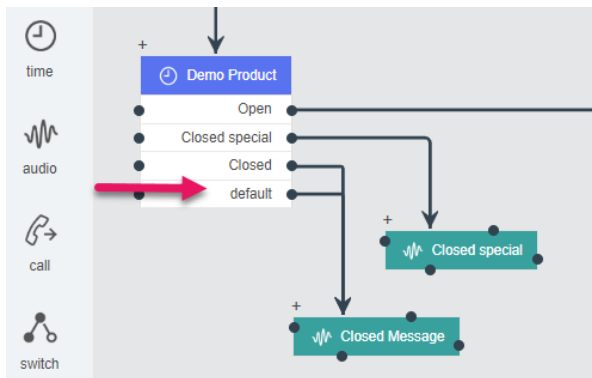
The value in the *To* field should always be set one minute before the desired ending time. This is because it covers a whole minute. If you set end 15:59 this means end 16:00:00.

Remember to save the changes you make. If you want to cancel the changes (before saving) just click the *Reset* button.

7.1.3 Exit used if nothing else specified (default exit)

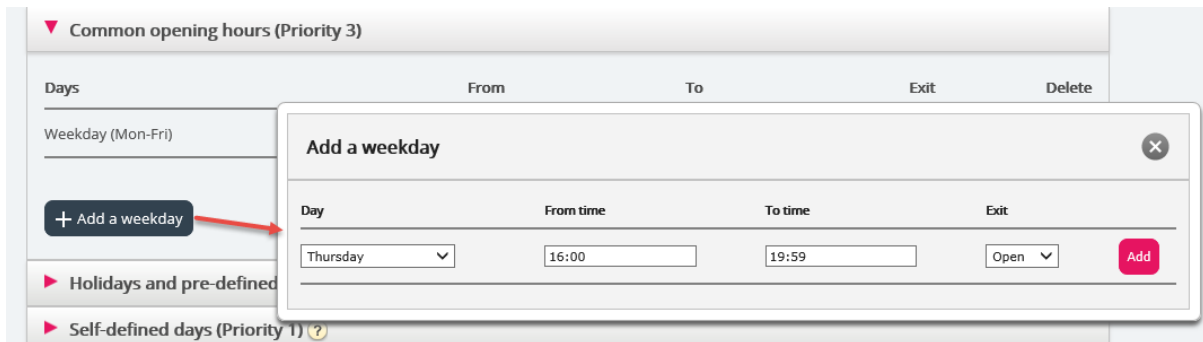
If no opening or closed hours are defined, the calls will automatically be routed to *Exit used if nothing else is specified*, which is the **default exit** from the Time module. The default exit is quite often pointing to an Audio module with a closed message.

Please make sure the default exit for the Time module is connected to the “correct” module, e.g. like this:



7.1.4 Common Opening Hours

Define the contact centre’s normal opening hours in the *Common opening hours* accordion by clicking *Add a weekday*.



In the new window that appears you can add an entry with *From time* and *To time* for *Weekday (Mon-Fri)*, *Weekend (Sat-Sun)* or an individual day, using the relevant *Exit*. The easiest way is to define when it’s open and have *Exit used if nothing else is specified* (default exit) pointing to a “closed message”. Add as many weekday rows as you need and then save.

In the example below, we have defined that exit *Open* should be used on *Weekdays (Mon-Fri)* from 08:00 to 15:59 and on *Thursday* from 16:00 to 18:59.

Days	From	To	Exit	Delete
Weekday (Mon-Fri)	08:00	15:59	Open	
Thursday	16:00	19:59	Open	

Overlapping entries?

You are not allowed to have 2 entries for the same day (e.g. Friday) that are overlapping, but you can have a single-day entry which overlaps with *Weekdays (Mon-Fri)* or *Weekends (Sat-Sun)*. Please note that the system, within *Common opening hours*, first

looks for match in single day entries, and if no match found, it looks for match in *Weekday (Mon-Fri)* or *Weekend (Sat-Sun)*. Example:

▼ Common opening hours (Priority 3)				
Days	From	To	Exit	Delete
Weekday (Mon-Fri)	08:00	18:59	Open ▾	🗑️
Friday	16:00	23:59	Closed ▾	🗑️

On Friday at 16:10, match is first found on row Friday 16:00-23:59, exit Closed.

7.1.5 Holidays and Pre-defined Days

In the *Holidays and pre-defined days* accordion you can define special opening hours for holidays and other special dates. You can add the relevant holidays for your Puzzel solution one by one (*Add a holiday or pre-defined day*), or you can add your country's holiday list and then remove days in the list you don't need before you save.

Add national holidays list:

First click *Add national holidays*.

The screenshot shows the 'Holidays and pre-defined days (Priority 2)' section. It contains a table with columns 'Days' and 'From'. Below the table are two buttons: '+ Add a holiday or pre-defined day' and '≡ Add national holidays'. A red arrow points to the 'Add national holidays' button. A modal window titled 'Add national holidays' is open, showing a 'Select holiday list' dropdown menu with 'English holidays' selected and a red 'Add' button.

Then select the correct country's list and click *Add* so that all days are added:

▶ Common opening hours (Priority 3)

▼ Holidays and pre-defined days (Priority 2)

Days	From	To	Exit	Delete
New years day (1st January)	00:00	23:59	Closed ▼	🗑️
Good Friday	00:00	23:59	Closed ▼	🗑️
Easter Monday	00:00	23:59	Closed ▼	🗑️
Christmas day (25th December)	00:00	23:59	Closed ▼	🗑️
Boxing day (26th December)	00:00	23:59	Closed ▼	🗑️

+ Add a holiday or pre-defined day ≡ Add national holidays

▶ Self-defined days (Priority 1) ?

Save changes Reset

Delete the days you don't need, adjust the *From* and *To* if needed, and choose the correct *Exit* per day before you click *Save changes*.

Please note that the national holiday lists in Puzzel do not necessarily contain all official public holidays for the country, and it may contain days/dates that are not public holidays!

There are more Holidays and pre-defined days defined in Puzzel than the ones included in your country's "national holiday list". Some holidays in Puzzel are floating (e.g. Good Friday and Easter Monday) and some are fixed dates (e.g. New Year's Day (1st January)). If you can't find a specific holiday in Puzzel (e.g. Early May bank holiday), you can add this holiday's date as a Self-defined day.

Add a holiday:

Click the *Add a holiday* button, and then select the relevant day in the list box, adjust the *From* and *To* if needed, and make sure the *Exit* is correct and click *Add*.

▼ **Holidays and pre-defined days (Priority 2)**

Days	From	To	Exit	Delete
Christmas day (25th December)	00:00	23:59	Closed ▼	🗑️

▶ **Self-defined days (Priority 1) ?**

Then click *Save changes* if things look ok.

Please note if your contact centre has limited opening hours during a holiday or pre-defined day, you need to take special measures. Please see details in chapter [The Precedence System](#).

7.1.6 Self-defined Day(s)

In the *Self defined days* accordion, you can define dates and date ranges that have different opening hours than normal (and that is not listed under Holidays and pre-defined days).

▼ **Self-defined days (Priority 1) ?**

Days	From date	To date	From time	To time	Exit	Delete
<input type="button" value="+ Add day(s)"/>						

Click *Add day(s)* to add one day or a range of days. You can:

1. Add a time interval for one day, by setting the same *From date* and *To date*, and the desired *From time* and *To time*. To choose the whole day, select *From time* 00:00 and *To time* 23:59.
2. Add a date range that should use the same exit for the whole date interval. Select *From date* and *To date* and set *From time* to 00:00 and *To time* to 23:59
3. Add a date range that should use the same exit for a specific time interval for each of the days in the date interval. Select the desired date range (e.g. 01.07.2016 – 31.07.2016) and the desired time range (e.g. 16:00-17:59). Please note that the defined exit in this case will be used only 16:00-17:59 for each of the days in the date interval.

4. Add a date range without a year if this range should be used all years from now. Enter the desired From date and To date on format dd-mm (e.g. From 01-07, To 31-07).

Click *Add* to add the new entry to the list, and then click *Save*. See example below:

► Common opening hours (Priority 3)						
► Holidays and pre-defined days (Priority 2)						
▼ Self-defined days (Priority 1) ?						
Days	From date	To date	From time	To time	Exit	Delete
Example 1 (14. December 2015)	<input type="text" value="14-12-2015"/>	<input type="text" value="14-12-2015"/>	<input type="text" value="00:00"/>	<input type="text" value="23:59"/>	Lukket ▼	
Example 2 (1. February 2016 - 5. February 2016)	<input type="text" value="01-02-2016"/>	<input type="text" value="05-02-2016"/>	<input type="text" value="00:00"/>	<input type="text" value="23:59"/>	Lukket ▼	
Example 3 (1. July 2016 - 31. July 2016)	<input type="text" value="01-07-2016"/>	<input type="text" value="31-07-2016"/>	<input type="text" value="16:00"/>	<input type="text" value="17:59"/>	Lukket ▼	
Example 4 (1. August - 2. August)	<input type="text" value="01-08"/>	<input type="text" value="02-08"/>	<input type="text" value="00:00"/>	<input type="text" value="23:59"/>	Lukket ▼	

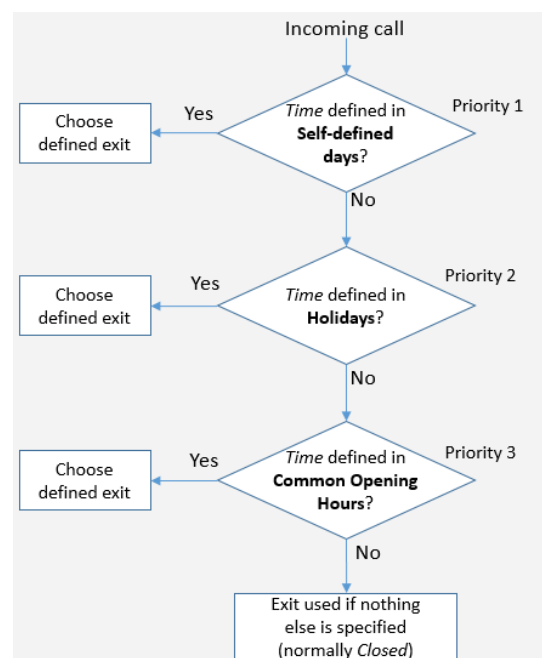
7.1.7 The Precedence System

The Time module may have entries on three levels:

- *Common opening hours (priority 3)*
- *Holidays and pre-defined days (priority 2)*
- *Self-defined days (priority 1)*

A Self-defined day takes precedence over a Holiday and pre-defined days, and a Holiday and pre-defined day takes precedence over a Common opening hour.

When a call arrives in the Puzzel platform, Puzzel first looks how the current time and date is defined in *Self-defined days*, then in *Holidays and pre-defined days* and finally in *Common opening hours*. Within Common opening hours, a single day entry has higher priority than Weekday (Mon-Fri)/Weekend (Sat-Sun).



Puzzel uses the first defined exit it finds, e.g. Open/Closed.

If a call arrives and there is no entry in the Time module covering this exact time, the call is routed to *Exit used if nothing else is specified* (=the default exit from the Time module)

Time management for Time module - Demo ?

Exit used if nothing else is specified:
Closed

7.1.7.1 Example of opening hours for Christmas Eve

To show how the precedence system works, we can use Christmas Eve (24th of December) when it falls on a Monday.

Let's say that on Mondays the contact centre is open 08:00-15:59, but on Christmas Eve (Monday) you only want the contact centre to be open 10:00-13:00.

How should you define the opening hours during this Christmas Eve that falls on Monday, to ensure that calls only enter the Contact centre from 10:00 to 13:00?

If we only define Exit Open between 10:00-12:59 on Christmas Eve, what would happen with calls arriving before and after this time interval?

For a call that arrives at 09:30, Puzzel would look for a matching defined time interval, and it would find one in Common opening hours; Weekdays 08:00-15:59 is defined with the Exit Open. Therefore, Puzzel would treat every call arriving 08:00-9:59 and 13:00-15:59 as it would during a normal weekday with the Exit Open.

We need to define that it's closed on Christmas eve before 10:00 and after 13:00:

▼ Common opening hours (Priority 3)				
Days	From	To	Exit	Delete
Weekday (Mon-Fri)	08:00	15:59	Open ▼	
Thursday	16:00	19:59	Open ▼	
+ Add a weekday				
▼ Holidays and pre-defined days (Priority 2)				
Days	From	To	Exit	Delete
New years day (1st January)	00:00	23:59	Closed ▼	
Good Friday	00:00	23:59	Closed ▼	
Easter Monday	00:00	23:59	Closed ▼	
Christmas day (25th December)	00:00	23:59	Closed ▼	
Boxing day (26th December)	00:00	23:59	Closed ▼	
Christmas eve (24th December)	08:00	09:59	Closed ▼	
Christmas eve (24th December)	10:00	12:59	Open ▼	
Christmas eve (24th December)	13:00	15:59	Closed ▼	

When you save, any redundant rows will be highlighted in yellow. In this case, the row with Christmas eve 1000-1259 Open is redundant since this time interval is covered by Weekday (mon-fri) 0800-1559. You can keep it if you think this gives you a better overview.

Testing the Service

To verify that things are ok for upcoming holidays, you can enter a future time (e.g. 25.12.2018 at 10:00) and click *Test now* to see how calls will be routed at this future point in time. The row (and exit) that will be selected at this future time be highlighted in blue.

Home » Services » Time » time1

Time management for time1 ?

Exit used if nothing else is specified:
Closed msg

On given time calls are routed to:
Christmas day (25th December)

Test the time module
Choose date and time to simulate the time module
25-12-2018 10:00 Test now

Save changes Reset

▼ Common opening hours (Priority 3)

Days	From	To	Exit	Delete
Weekday (Mon-Fri)	08:00	15:59	Open ▼	
Thursday	16:00	19:59	Open ▼	

+ Add a weekday

▼ Holidays and pre-defined days (Priority 2)

Days	From	To	Exit	Delete
New years day (1st January)	00:00	23:59	Closed ▼	
Good Friday	00:00	23:59	Closed ▼	
Easter Monday	00:00	23:59	Closed ▼	
Christmas day (25th December)	00:00	23:59	Closed ▼	
Boxing day (26th December)	00:00	23:59	Closed ▼	

Incorrect Services

If your settings are incorrect, for example *From time* is later than the *To time*, or the same time interval is covered by 2 rows under Holidays (e.g. Christmas Eve 0:00 to 9:59, and Christmas Eve 08:00-08:59), these rows will be red and you must correct these errors to be able to save.

7.1.8 Web-access to Time Module

If you offer callback from your web-page (a Call me-button) or you have Chat in your Puzzel solution, and you only want to offer callback or chat when it's open, you can open the relevant Time module for web-access if you don't use Puzzel web-services. Your company's web-site can then ask Puzzel if it's open, and then offer callback or chat only when it is open. See also Web-access to Queue.

Home » Services » Time

List of Time Modules ?

Name	Webaccess	Edited by
Main time	<input checked="" type="checkbox"/> (1918_Main time)	-
time1	<input type="checkbox"/>	-

7.2 Audio

On this page you can record, upload and manage your sound files.

puzzel. Home Real-time Users **Services** Statistics Catalog Archive Widget SMS

Time **Audio** Service Variables KPI Alarm Silent Monitoring Queues Dialler Services Call Flow Content Editor Lists Social Chat Agent Assist

Home » Services » Audio

Audio ?

- ▶ Sound Files in Use
- ▶ Sound File Library
- ▶ Sound File Category

Support can configure the solution so that only some sound file modules are visible here.

7.2.1 Sound Files in Use

Here you can see what sound files that are now being used in the different modules.

▼ Sound Files in Use

Filter table...

Module within the solution	Sound File Category	Assigned Sound File	Edit
audio1		channel3	
caller input1	Menu	Sleep Away.wav	
Main Menu	Menu	Main Menu.wav	
menu1	Menu	Sleep Away.wav	
Queue sales	Queue	Queue Intro.wav	
Queue support	Queue	Queue Intro.wav	
queue1 - Intro Message 1		\$system_secret_number	



Save changes Reset

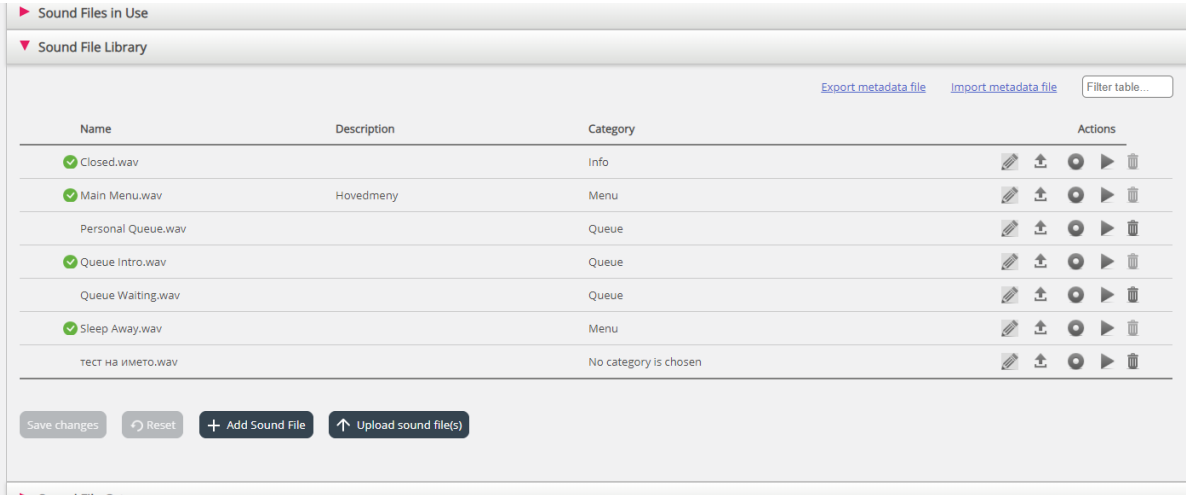
If you want to change the assigned file for a module, click in the Edit symbol (pencil) next to it, and then change the Sound File Category if needed and choose the new file in the Assigned Sound File list box, and then click Save changes.

7.2.2 Sound File Library

In this section, you can see an overview of available sound files stored in the solution, including those that are not in use. Sound files can be recorded over the phone (Puzzel calls to your number and gives you instructions), and sound files can be uploaded from your computer.


Sound files that are in use in the solution are clearly marked. (✔)

To **update** an existing sound file, click  to record a new version using your phone, or click  to upload a MP3/OGG/WAV file that should replace the existing file.





Name	Description	Category	Actions
✔ Closed.wav		Info	
✔ Main Menu.wav	Hovedmeny	Menu	
Personal Queue.wav		Queue	
✔ Queue Intro.wav		Queue	
Queue Waiting.wav		Queue	
✔ Sleep Away.wav		Menu	
ТЕСТ НА ИМЕТО.wav		No category is chosen	

Buttons: Save changes, Reset, + Add Sound File, Upload sound file(s)

To **listen** to an existing sound file, click the play button  next to it. You are now asked if you want to Open or Save the wav file. Choose Open if you just want to listen to it on your PC's default audio player. (wav files can't be played in the browser).

To **delete** a sound file, click the delete button  next to the row and then click *Save changes*.

Add a new sound file

To add a new sound file, click *Add sound file* to make a new entry in the list. Enter a name (Puzzel will add '.wav' to the name), a description, select a Category and click *Save changes*. Then click the record button  next to this new row to record over the phone, or click the upload button  to upload a MP3/OGG/WAV file.

Import/export sound file metadata

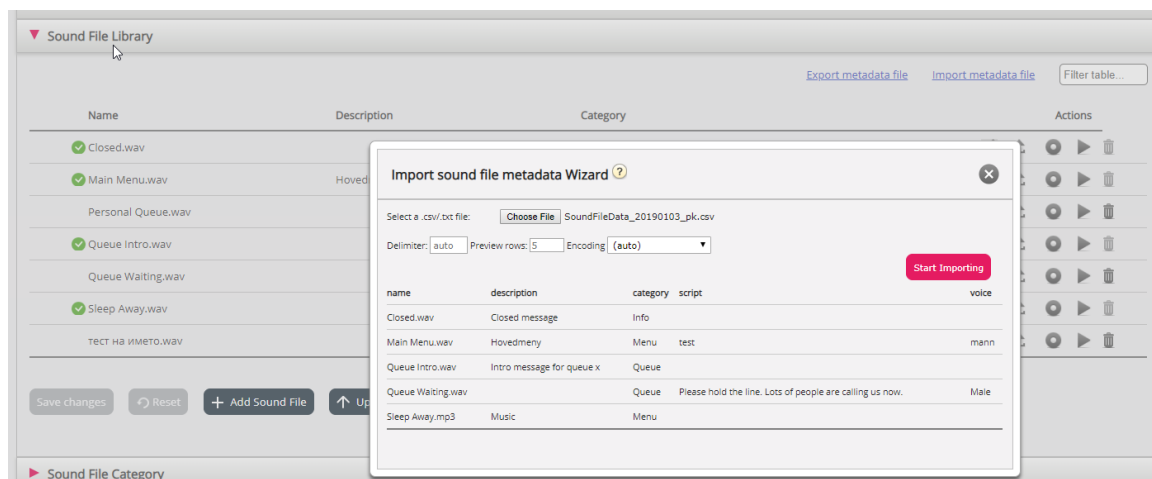
You can export a file with metadata to get an overview over your sound files. If you click *Export metadata file* and then confirm, a CSV UTF-8 file with columns *name*, *description*, *category*, *script*, *voice* and *usedNow* will be generated.

	A	B	C	D	E	F	G
1	name	description	category	script	voice	usednow	
2	Closed.wav		Info			1	
3	Main Menu.wav	Hovedmeny	Menu	test	mann	1	
4	Personal Queue.wav		Queue			0	
5	Queue Intro.wav		Queue			1	
6	Queue Waiting.wav		Queue	Please hold the line. Lots of peo	Male	0	
7	Sleep Away.mp3		Menu			1	
8	тест на името.wav					0	
9							

You can also **import** a metadata file to update metadata for some or all of your existing sound files, as an alternative to update metadata for one sound file at a time. The easiest way to import a sound file metadata file is to:

1. Start with the exported metadata file
2. Delete column usedNow (since this should not be in the import file)
3. Delete the rows with no changes in metadata
4. Update the information for description, category, script and voice where needed
5. Save the file as CSV UTF-8
6. Import the file

The Import wizard popup window looks like this:



If there are errors in the selected file (wrong column headers, duplicates, values in category or name which do not exist), you will see it and you will not be able to click *Start importing*.

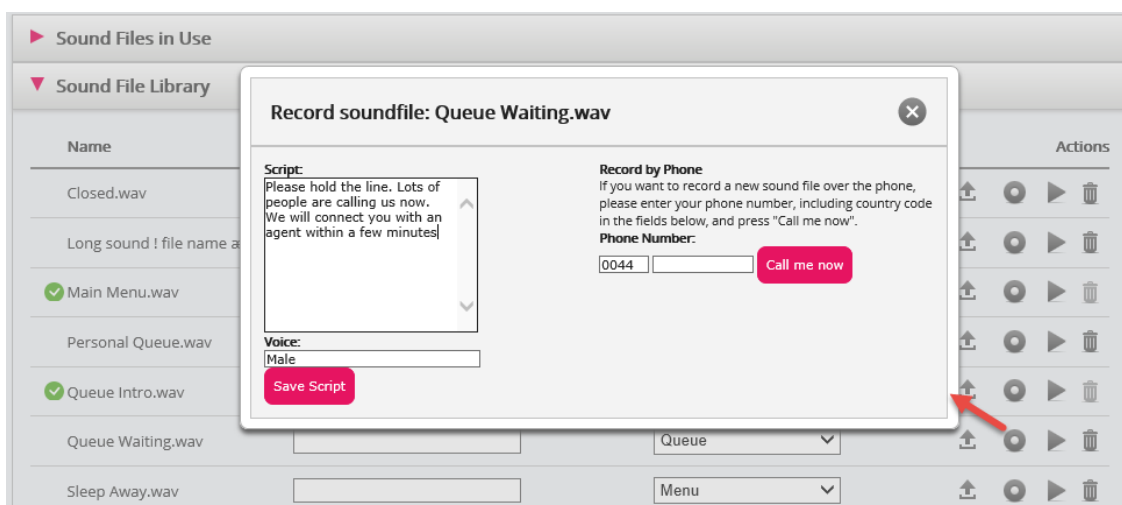
- The file must contain only existing sound file names and existing categories.
- If description, category, script, or voice has value for a row, the sound file's values will be updated.

- Only if description, category, script, or voice has value “_blank_”, the sound file’s current value for the column(s) will be deleted.

7.2.3 Record Sound File

Click on Record button to open the *Record sound file* window. Here you can add or edit the Script and the name of the voice used.

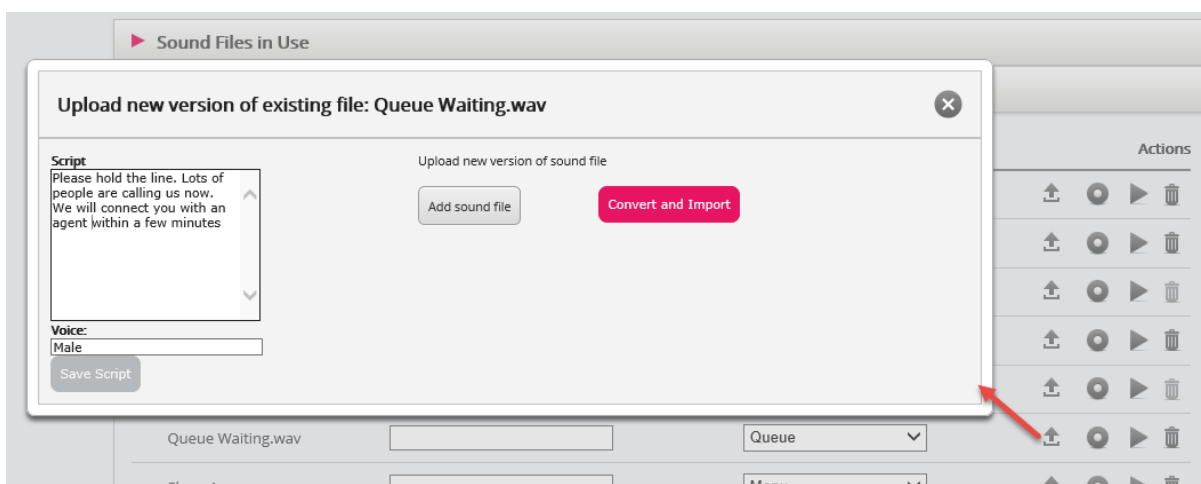
When you are ready to record, enter your phone number and click *Call me now*. Puzzel calls you and gives you instructions on when to start speaking and how to stop, playback and save recording.



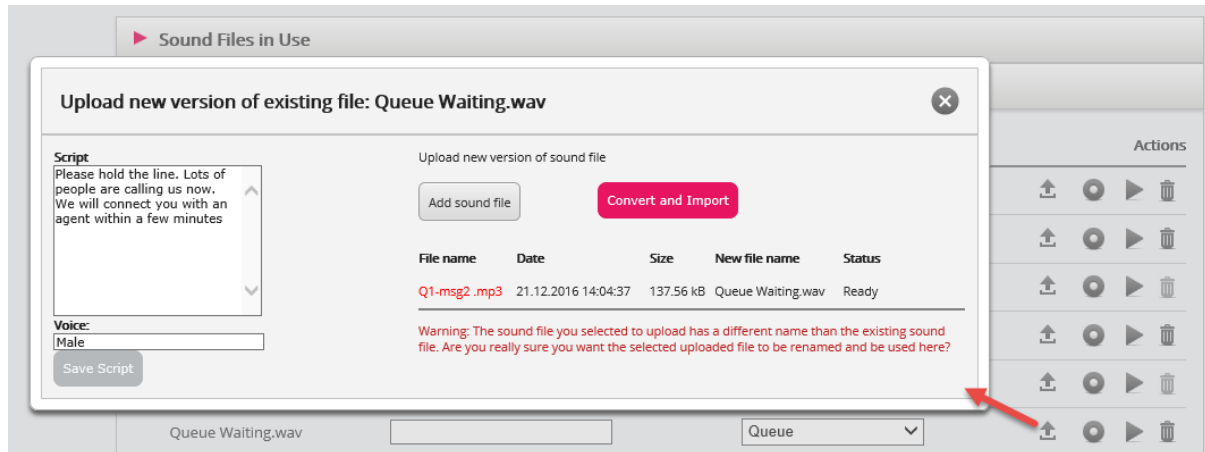
7.2.4 Upload Sound File

You can upload MP3, OGG and WAV files. Uploaded files will be converted to WAV a-law format (64 kbps), since this is the format used in the phone network.

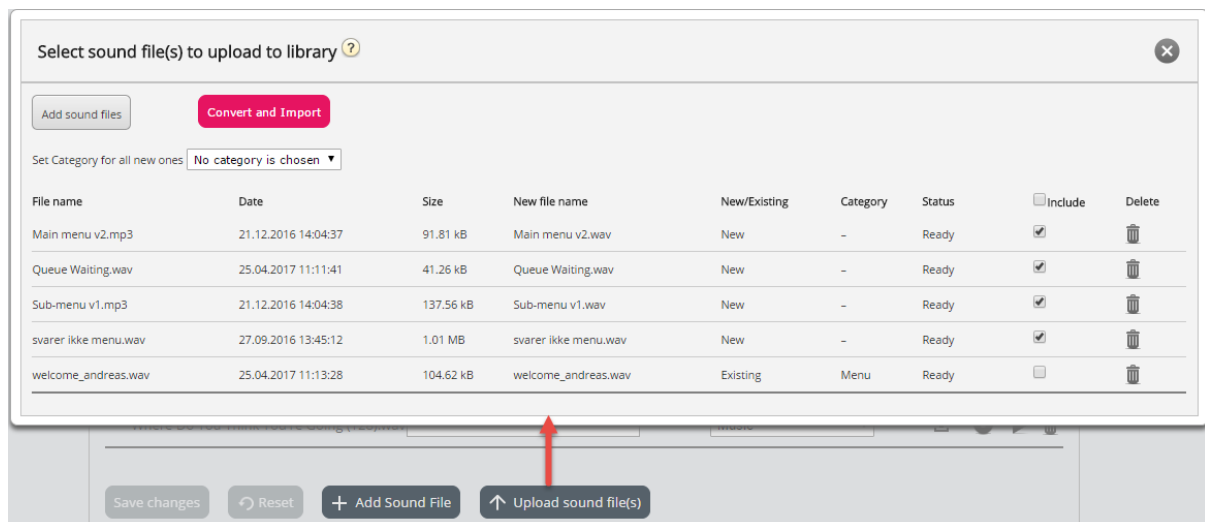
If you want to upload one sound file that replaces an existing sound file, click the upload symbol next to the sound file to open the window where this can be done.



Click *Add sound file*, then choose the correct file from your disk. If the selected file has a different name than the one you're uploading a new version of, you will be notified. Then click *Convert and Import*.



If you want to upload several sound files at the same time, click the *Upload sound files* button in the Sound File Library to open the window where this can be done. Click *Add sound files* and select files from your disk. The selected files will be shown in a table.



File names already in the Sound File Library will be shown as *Existing*, and as default *Include* is not checked. Example: If 'menu.wav' is already in the Library and you have selected 'menu.mp3' from your computer, it will be shown as *Existing*. If you want to include an existing file in this import, just check *Include*. Remember that if you import a new version of a file that already is in the Library, the old version is deleted.

If all new files you import should be in the same Category, you can select Category here. Click *Convert and Import* when you have verified that these files should be imported. The files will be analysed and converted to wav a-law format.

For each new sound file imported, a new row is created in the Sound File Library. For each imported replacement file, you might want to update the description.

PS If you want to upload a new version of an existing file (e.g. menu.wav) and the new version has a different file name (e.g. menu_v2.mp3), you must click on the upload symbol next to the correct sound file in the list.

Sound file quality/bitrate and file size

The maximum allowed file size per sound file to be uploaded is 10 MB. This is usually more than enough for announcements, but if you want to upload music, 10 MB might seem to be too little. Remember that the higher bitrate your original sound file (lasting e.g. 10 minutes) has, the bigger the file is. Since your uploaded file is converted to WAV a-law 64kbps, it is not necessary to have a very high bitrate in the file you want to upload. Let's say you want to upload a sound file containing 10 minutes of music (3 tracks in one file) to be used in the queue. If the MP3 sound file has bitrate 320 kbps, this file will be 23,4 MB (too big to upload). If the MP3 sound file has bitrate 128 kbps, the file will be 9,4 MB (allowed to upload). So, if your sound file is too big to upload (>10MB), you should consider converting it to a lower bitrate to decrease the file size.

7.2.5 Sound File Category

Categories are used to organise the sound files in your service. Here you can add new categories, change name for existing categories and delete unwanted categories as long as they are not in use. We recommend that you select the correct Category for each sound file under accordion Sound File Library.

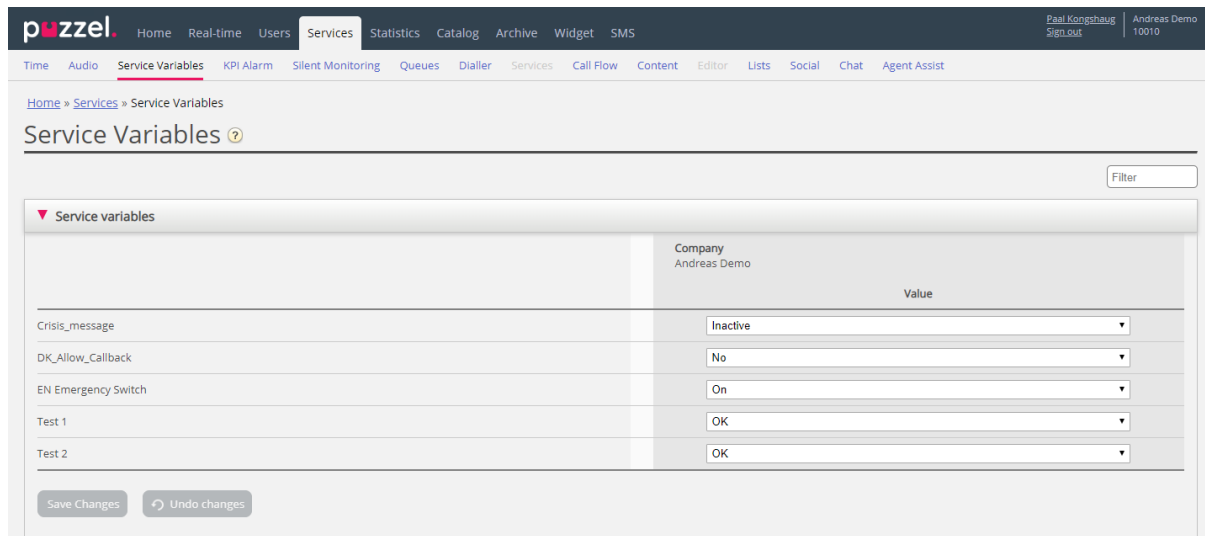
Category	Actions
Info	
Menu	
Queue	

Save changes Reset + Add a New Category

7.3 Service Variables

This module enables you to change some variables in the Puzzel solution. Its main purpose is to determine how a request is handled, either by assigning each variable a

value from a dropdown menu, or by typing it yourself. What variables that are available is configured in collaboration with Puzzel support when the solution is first set-up.



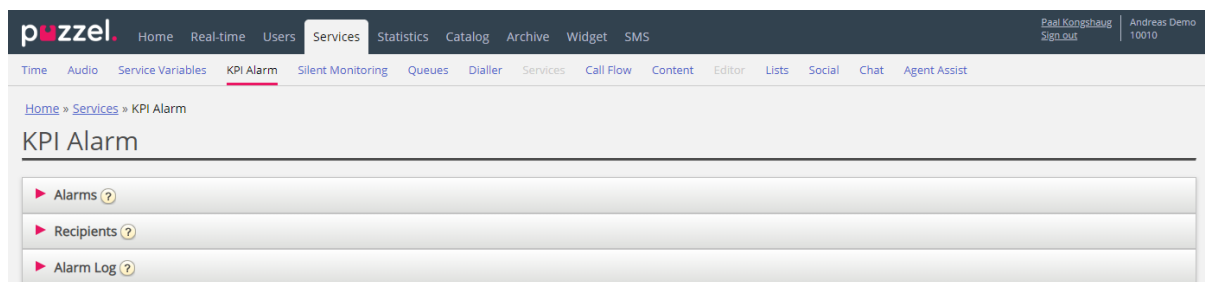
Among features that can be changed are:

- *Opening hours*
- *Special voice message.*
- *Route traffic*
- *Switch functions on/off.*

In the example above some service variables for different locations have been configured into the solution. In this case, if the Denmark office would not want to offer their callers callback at the moment, this can be configured by choosing *No* from the drop-down menu and then Save Changes. Configuring a special variable can enhance the flexibility of your solution.

7.4 KPI Alarm

KPI Alarm is divided into 3 sub-areas: Alarms, Recipients and Alarm Log. The KPI alarm system makes it possible to define threshold values for various KPI's (Key Performance Indicators) on system queues.



Puzzel will compare threshold values (that are valid for the defined time period) with actual values in Puzzel and if there is discrepancy between them an alarm goes off.

When an alarm is triggered, it can be seen:

- *in the Queue Overview in the Administration portal*
- *on the Homepage and on wallboards containing the affected queue and column.*
- *In the agent application's Queue overview (unless it's turned off)*

In addition, an alarm is sent by SMS/E-mail to any recipients configured to receive it.

7.4.1 Types of Thresholds

There are two types of thresholds to choose from

- *Real-time values*
- *So far values*

7.4.1.1 Real-time Values

Name	Description	Example
SLA-Score Now	The queue's SLA score is equal to the SLA score of the request that has waited relatively longest in the queue.	>200
In Queue Now	Total number of requests in queue now	>30
Logged on and not in Pause	Total number of agents logged on excluding the ones in status pause.	<5
Longest wait time now	Waiting time of the request that has waited the longest time in queue.	>600 (sec)
Logged on (incl. pause)	Total number agents logged on including the ones in status pause	<8
In Pause	Total number of agents in status Pause now	>4
Callbacks in Queue	Total number of callbacks waiting in queue now	>10

These thresholds are used to compare real-time status with the defined thresholds.

7.4.1.2 So far values

Name	Description	Example
Avg. Speak time so far	Average Speak time for answered calls so far today	>240 (sec)
Avg. Wait time so far	Average Wait time in queue for answered calls so far today	>120 (sec)
Answer % so far	Number of answered calls relative to number of calls offered to the queue so far. (Please note that calls now waiting in queue are counted as offered and might be answered later)	>80%
Answer % within SLA so far	Number of calls answered within the defined SLA (e.g. 30 seconds) relative to the number of calls offered to the queue so far today.	>70%
Avg. wrap-up time so far	Average wrap-up time for answered calls so far today.	>120 (sec)
Calls offered so far	Number of calls offered to (=arrived in) a queue so far today	>100

7.4.2 Alarms

In the Alarms accordion you create your alarms.

Alarm Name	Queue Name	Thresholds	Recipients	Time	Alarm Message	Enabled	Delete
Support - agents	Support	0	0	08:00-16:00		<input type="checkbox"/>	

To create a new alarm, you must:

- Click the *Add alarm* button and define an alarm name, choose queue, set the time it should be active and click *Save changes*.
- Then click on '0' in the *Thresholds* column to open the *Alarm Threshold Configuration* window, and add one or more thresholds. See next chapter.
- Click on '0' in the *Recipients* column to open the *Select Alarm Recipients* window if you want this alarm to be sent to any recipients. (Recipients must be defined before they can be selected here)

You can also create an Alarm message, which will then be sent as an addition to the standard message that is normally sent.

To activate the alarm, check the *Enabled* box.

Remember to click *Save Changes* after you have made changes you want.

7.4.2.1 Configuring Thresholds

Clicking on a number in the *Thresholds* column in the *Alarms* table opens a new window: *Alarm threshold configuration*. The number in the *Thresholds* column is not a threshold value, but the number of different threshold values defined for this alarm!

Type	Value	Deviation	Delete
Logged on and not in Pause	< 1 Number	<input type="text"/>	
In Pause	> 5 Number	<input type="text"/>	

Here you can define the types of threshold and their values for the chosen alarm. One alarm can contain one or more thresholds.

In this example the alarm is triggered if less than 1 agent is logged on and not in pause, and if more than 5 agents are in pause.

The Deviation field is normally used when the threshold values are imported from an external system through custom integration. It is used to avoid an alarm to trigger when there are only minor deviations from the threshold values (e.g. planned number of agents logged on). You don't need to define a deviation for threshold values defined here.

7.4.2.2 Recipients for an Alarm

Clicking on the hyperlink in the Recipients column opens a new window.

The screenshot shows the 'Alarms' configuration page with a modal window titled 'Select Alarm Recipients'. The modal contains a table with the following data:

Recipients	Interval (min)	Enabled
Andreas Wallin (SMS)	5	<input checked="" type="checkbox"/>
Paal Kongshaug (EMail)	5	<input type="checkbox"/>

Buttons for '+ Add Alarm', 'Save changes', and 'Save' are also visible.

In this window you can select which (of the pre-defined) recipient(s) that should receive this alarm. In this example 2 recipients are shown, but only 1 is selected to receive this alarm.

In the *Interval* column you can decide how many minutes that minimum should pass before this Alarm message is sent to the recipient again.

7.4.2.3 Time Period for your Alarm

The screenshot shows the 'Alarms' configuration page with a table of alarms. The 'Time' column for the 'Sales' alarm is highlighted with a red box and contains the text 'Varies*'. The 'Support - agents' alarm has a time of '08:00-16:00'.

Alarm Name	Queue Name	Thresholds	Recipients	Time	Alarm Message	Enabled	Delete
Support - agents	Support	2	1	08:00-16:00		<input type="checkbox"/>	
Sales	Sales	1	0	Varies*		<input type="checkbox"/>	

Buttons for '+ Add Alarm', 'Save changes', and 'Undo changes' are also visible.

The default Time for a new alarm is Monday-Friday 0800-1600.

To change the Time an alarm should be active, click on the hyperlink in the Time column to open a new window.

In the Alarm Time window, you can select during which time periods your alarm should be active.

We suggest you define the Alarm Time to be similar to the normal opening hours. Remember that alarms like 'less than x agents logged on' will always be triggered outside your opening hours.

7.4.3 Recipients

In the Recipients accordion you can define alarm recipients, and how and when they should receive alarms.

Name	Mobile Number	SMS	Call	Email	Time	Enabled	Delete
Andreas Wallin	004798 [redacted]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	08:00-24:00	<input checked="" type="checkbox"/>	
Christian Thorsrud	004795 [redacted]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	08:00-16:00	<input type="checkbox"/>	
Paal Kongshaug	004798 [redacted]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	paal.kongshaug@puzzel.com	(Varies*)	<input checked="" type="checkbox"/>	

There are 3 different ways of receiving the alarm, SMS, Email and by Phone. We recommend using SMS and Email as your preferred channels of contact. This is because you get limited information when receiving a Call. You will be informed that an alarm has been triggered and that you can find more detailed information in the Administration portal and in an SMS or Email if you have subscribed to these methods of contact.

Mobile numbers must include prefix 00 and the country code

7.4.3.1 Recipient Time

Click on the hyperlink in the Time column in the Recipients table if you want to define the time period for which a recipient should receive alarms.

7.4.4 Alarm Log

Here you can see a log of the alarms that have been sent to a recipient. If you have created an alarm but not defined that a recipient should receive it, it will not appear in the Alarm log. Each night, all log entries older than 3 months are deleted.

Date and Time	Alarm Name	Queue Name	Threshold Name	Recipient Name
16.12.2015 13:57:03	None logged on	Sales	Logged on (incl pause)	Andreas Wallin
16.12.2015 13:52:01	None logged on	Sales	Logged on (incl pause)	Andreas Wallin

7.5 Silent Monitoring

Users with access to the Silent Monitoring page can listen in on conversations between callers and agents. Neither the caller nor the agent will hear the listener’s voice during the call.

Your Puzzel solution can be configured to notify the agent that he/she is being monitored when someone is monitoring a call (a headset icon will appear in the agent’s application, and a short beep (~0,3 sec) is played for the agent). However, if the notification feature is turned off, the agent will not be aware that his/her call was monitored.

If a call has been silently monitored, this is shown in the [Archive](#).

To monitor a call, you first need to search for an agent to monitor. Search for agents based on their name or the user group they belong to. You can also look for agents that are in status *Connected* by clicking in the *Connected agents* check box.

There is no active Silent Monitoring request at the moment

▼ Search/Select Agent ?

Search Agent: User Group: Connected Agents

Agent Name	Agent's Phone Number	Skills	User Group	Status	Status Duration
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If an agent has a headset next to her name, you or another user have already requested a silent monitoring on this agent. Only one user can listen to each agent at time.

Search/Select Agent ?						
Search Agent:	<input type="text" value="th"/>	User Group:	Select User Group	Connected Agents	<input type="checkbox"/>	<input type="button" value="Search"/>
Agent Name	Agent's Phone Number	Skills	User Group	Status	Status Duration	
Christian Thorsrud (thochri)	Softphone	All requests	Admins	Logged off (0)	1 d 01:36:32	
Thomas Rødseth (Thomas)	Softphone	All Phone Queues	Admins	Ready	3:27:25	

Once you have found the agent you want to monitor, you click on his/her name and the Request Silent Monitoring window will appear.

7.5.1 Request Silent Monitoring

In the *Request Silent Monitoring* window, you must choose “listener”. The listener is usually you, but you can e.g. let an unexperienced agent listen in on an experienced agent’s call(s).

- If you want to listen, enter you own phone number or select *My softphone*
- If you are ordering Listen in on behalf of another user, please enter this other user’s (mobile) phone number or select the correct user group and user name so that this person receives the listen in call on his/her Puzzel softphone.

Phone numbers (fixed or mobile) must include 00 and country code.

The listener’s Softphone (in agent.puzzel.com) must be logged on to queue (with any profile containing Phone) to receive the listen in call. We recommend that the listener is in a (yellow) pause state (e.g. Admin) or use a profile not containing inbound queues while waiting for a listen in call.

You then need to decide how many calls you want to listen to (default 1) and until what time. The reason you set a time limit is to avoid situations where Puzzel calls you/the listener when unavailable (e.g. in a meeting)

Once you have filled out the relevant information, click *Add*.

7.5.2 Silent Monitoring Request

Once your Silent Monitoring request has been saved, the detail of your request will be shown in the upper left corner on the Silent Monitoring page.

If the agent that you want to monitor is already in a Puzzel call, you/the listener will receive a call immediately. If the chosen agent is not engaged in a Puzzel call, you/the listener will be called the next time the agent becomes engaged in a Puzzel call. Please note there is no guarantee the agent you want to monitor will receive and answer any call from Puzzel within the time limit. The reason might be that the agent logs off/clicks Pause or there are few incoming calls to the queue the agent answers.

The screenshot shows the 'Silent Monitoring' page in the Puzzel administration portal. The breadcrumb trail is 'Home > Services > Silent Monitoring'. The page title is 'Silent Monitoring'. Below the title, there is a section titled 'Silent Monitoring Request Information' containing a table with the following data:

Listen in ordered by	Paal Kongshaug (paal)
Listener	Paal Kongshaug (paal) (softphone)
Monitored agent	Henrik Kusoa (kushen)
Request Details	2 calls until 17:00

Below the table is a red 'Delete' button.

When Puzzel calls the listener's phone so that the listener can listen in on the agent's conversation with the caller, the call information (caller's number, access number, queue name) will appear in the upper right corner on the Silent monitoring page for the user that ordered the silent monitoring. The phone number displayed on the listener's phone is a Puzzel access number (must be configured).

If the agent makes a consultation call while being monitored, the listener will still be able to monitor the call. However, if the agent being monitored transfers the call, the listener will be disconnected.

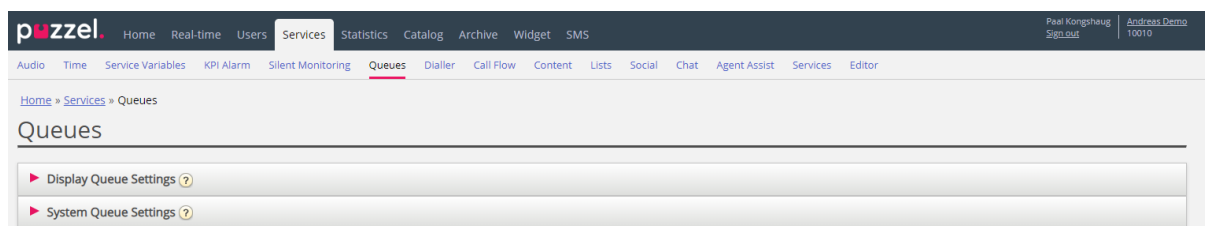
One Puzzel Admin user can have more than one active Silent monitoring request at a time. This can be useful if you want to let a person without access to the Silent Monitoring page (e.g. a new agent) listen to some calls answered by an experienced

agent, at the same time as you want to listen to another agent. You should not order Silent monitoring on 2 different agents at the same time with yourself as the listener since it's very likely that the 2 agents will be connected at the same time!

7.6 Queues

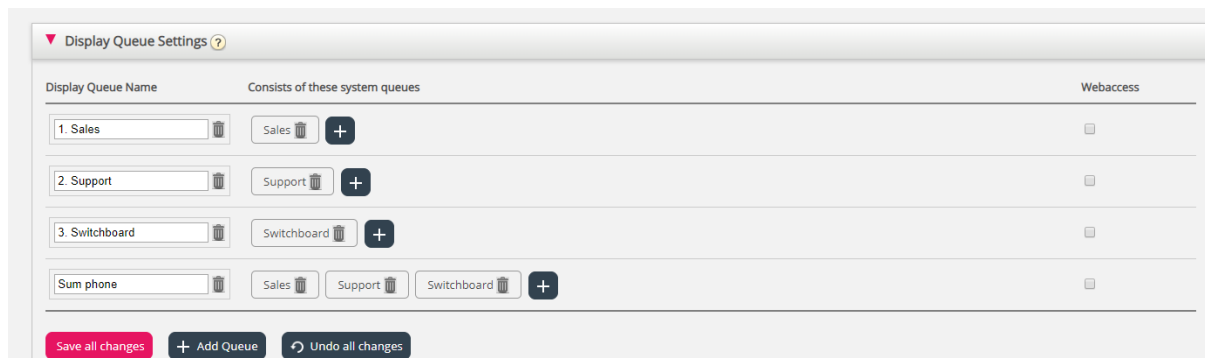
On page *Services - Queues* you can:

- see and configure queues that should be displayed in Puzzel; the Display queues
- see and configure parameters (SLA, wrap-up, Enquiry registration etc) for your System queues, and create new queues.



7.6.1 Display Queue Settings

Here you can see and possibly edit what queues that should be visible in the queue overview, wallboard etc. The standard solution is to define one Display queue for each system queue. Only users with the administration property *Edit Display queues* ON can add/edit/delete Display queues.



In the example above, Sales, Support and Switchboard are 3 separate systems queues (each with its own Display queue) that we have decided to group together in a Display queue called “Sum Phone”. This Display queue sums up the activities across all 3 system queues.

One system queue can be included in one or more Display queues, and you can have system queues not included in any Display queue, e.g. the Callout-queue.

Please note that SLAs are defined per system queue, and that in statistics and in Archive we show and group by system queue.

If you delete a Display queue, this has effect on Queue overview, Ticker and Wallboard

7.6.1.1 Web-access to Queue

If you offer callback from your web-page (a Call me-button) or you have Chat in your Puzzel-solution and you only want to offer callback or chat when at least one agent is ready, or only when less than x is waiting in queue, you can open the relevant Queue for web-access if you don't use Puzzel web-services. Your company's web-site can then ask Puzzel about queue status, and then offer callback or chat only when agents are logged on or few are waiting in queue. See also Web-access to Time Module.

7.6.2 System Queue Settings

Here you can see different parameters per system queue. A user with administration property *Edit System queue* ON can also edit values here.

- **SLA** and Alternative SLA (details [here](#))
- **SLA Overflow** (details [here](#))
- **Wrap-up time**
 - If a phone queue has a pre-defined wrap-up, this value is used instead of the answering agent's pre-defined wrap-up time. See [Agent Timeouts](#).
- **Recording**
 - "Forced" recording can be turned ON/OFF for phone queues, but only user with access to *Recording* on page *Users – Products* can do it. Please do not turn on recording on a queue unless you are sure that it's needed and ok and the IVR informs about recording. Please contact Puzzel before you turn on Recording for the first queue in your solution, since the Archive or FTP storage of files must be configured! See also [forced Recording on agents](#).
- **Enquiry registration** (details [here](#))

You can **sort** the table with system queues by clicking on a column header, and you can search for queues by typing text in the **Filter** input field.

System Queue Name	Media type	Task	Skill	S L A (sec)	Alternative SLA (sec)	Overflow 1 (score)	Overflow 2 (score)	Wrap-up (sec)	Call Recording	Enquiry registration categories	
1. Sales	Phone		Sales (Skills)	30	0	200	01:00	400	02:00	90	Test category, Sales
2. Support	Phone		Support (Skills)	20	30	200	00:40	300	01:00		Complaint, Technical issues
3. Switchboard	Phone		Switchboard (Skills)	30	0	100	00:30	100	00:30		[All default]
Chat Sales	Chat		Sales (Skills)	25	60	150	00:37	200	00:50		Sales, Technical issues
DIALER Q1	Phone		Dialer Q1 (Dialer)	0	0	0		0		60	[None]

Each system queue's ID (=queue_key) is shown as a **tooltip** behind the queue name.

A system queue usually consists of one media type and one skill, e.g. [Chat AND Support], but there are some exceptions:

- The outgoing calls ('callout') queue consists of media type Phone and *possibly* a skill.
- A queue might consist of a media type and 2 skills, e.g. [Phone AND Support AND Product-X].
- In very special cases a queue can consist of an "OR" statement, e.g. [Phone AND Skill-x OR Phone AND Skill-y]. For such queues you cannot edit the skill names.

The different **media types** are:

- **Phone**
- **Chat**
- **Social** (used for Facebook, Twitter, WhatsApp, Trustpilot and incoming SMS in queue)
- **Email** (used for ordinary email, etask and for Scheduled task).
 - Queues with media type email that are for Scheduled task must be marked as *Scheduled task* to appear in agent.puzzel.com after June 2020.

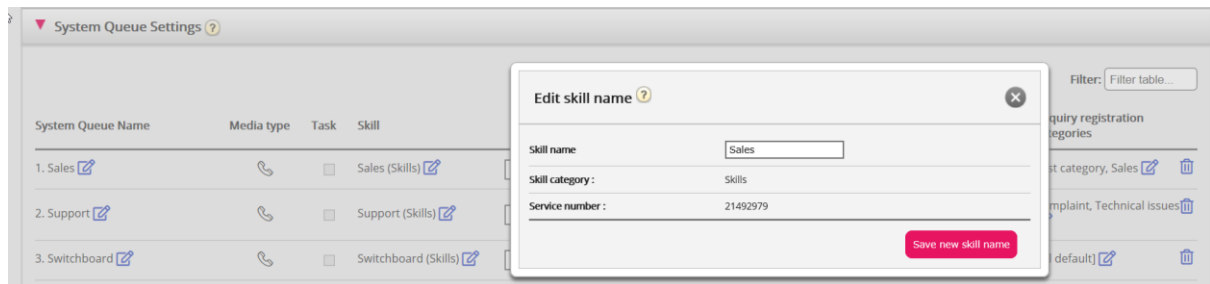
Edit system queue name

If you have a system queue with a name that should be changed, this can be done by users with access to edit system queue settings. Click the edit icon next to the queue name, change the queue name in the popup window and click *Update name*, and then finally click *Save all changes* at the bottom of the page.



Edit skill name

If you have a skill name that needs to be changed, this can be done by users with access to edit system queue settings. A skill can be renamed only if there are no unsaved changes on the page. Click the edit icon next to the skill name, change the skill name and click *Save new skill name*.



Please note that a skill can be used by more than one system queue, and that skill names are used/shown in the profile definitions on page *Users – User Groups*, and that agents only see profile names when they log on to queue.

7.6.2.1 Add system queue

A user with administration property *Add system queue* ON can create new system queues (and delete system queues). A new queue can be added only if there are no unsaved changes on the page.

When you want to add a new system queue, you must select:

1. Service number (only if you have more than one).
2. Media type: Phone, Chat, Social or Email.
 - If Email is selected, you can tick Scheduled task if relevant.
3. Queue name: The system queue's shown name.
4. Queue_key: The queue's "id" used in Archive, Statistics and in Raw data.
5. Skill category: Select the relevant Category (if you have at least 2 categories). If you need a new Skill category, please ask Puzzel to create it before you create the new queue with a skill in the new Skill category.
6. New skill or existing skill
 - If new skill, enter skill name. We recommend name similar to queue name.
 - If existing skill, select the correct skill for this new queue.

About new queues with different media types

- A new system queue for **Phone** can be used in your Call Flow Tool configuration.

- When a new queue for **Chat** is created, we also create a new chat access point. (A chat access point is on format ‘Chat_<customer number>_<queue_key>’, e.g. ‘Chat_10009_q_chat_sales’).
- A new queue for **Social** can be used for requests from a (new) Social “channel”, configured on page *Services – Social*.
- A new queue for **Scheduled task** (is given media type Email and Scheduled task checked) will be available for agents to put new Scheduled tasks in.
- A new queue for **Email** will be available for agents (and bots if relevant) to transfer email requests to. If you need a new access point for a new email queue, please contact Puzzel so that we can create it.

When a new system queue is created successfully, you will see it on page *Services – Queues* under *System queue settings*.

When you are ready, you can create a new **Display queue** containing this new system queue so that the new Display queue will be shown in the Queue overview in Admin portal and in the agent application.

If you created a new skill for the new system queue, this skill should be added to existing and/or new user group **profiles** so that agents can get requests from this new queue.

7.6.2.2 Delete system queue (and skill)

A user with access to Add system queues can also **delete** a system queue (and belonging skill). Usually, you do not want to delete a system queue that’s used, but if you or a colleague created new queues and you realise you don’t need one of them, you can delete it.

A delete icon is shown to the right on each queue row:

System Queue Name	Media type	Task	Skill	S L A (sec)	Alternative SLA (sec)	Overflow 1 (score)	Overflow 2 (score)	Wrap-up (sec)	Call Recording	Enquiry registration categories
1. Sales		<input type="checkbox"/>	Sales (Skills)	30	0	200	400	90	<input type="checkbox"/>	Test category
123456789-123456789-123456789-12		<input type="checkbox"/>	test (Skills)	120	0	100	200	30	<input type="checkbox"/>	[All default]
2. Support		<input type="checkbox"/>	Support (Skills)	20	30	200	300		<input checked="" type="checkbox"/>	Complaint, Technical issues

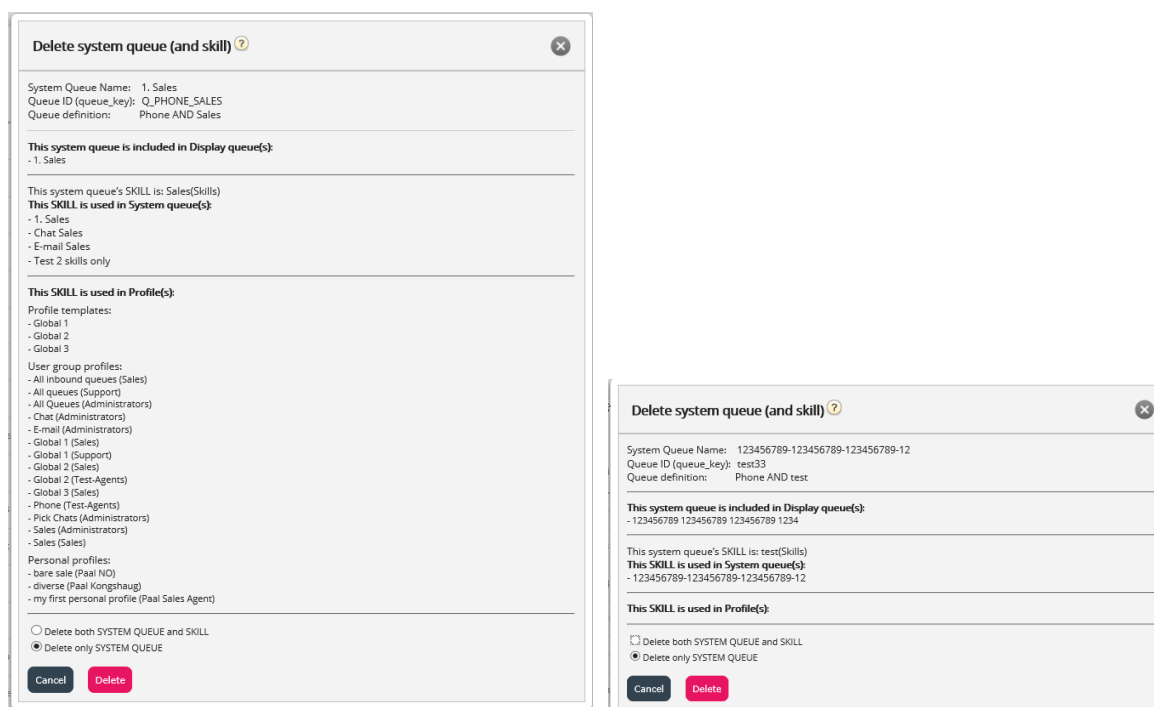
Since we do not want users to delete a queue that is in use, we will tell the user what the queue and its skill is used for before the user can choose to delete.

If you click the delete icon for a queue, a popup window with this information appears:

- The system queue definition

- The Display queue(s) this system queue is used in (might be none, one or several)
- The system queue(s) that uses this queue's skill (might be more than this queue)
- The profiles (if any) this queue's skill is used in (might be none, some or many)
- Radio buttons for *Delete only system queue* and *Delete system queue and skill*

Two examples:



In the first (left) example, the system queue is used in other display queues and the skill is used in lots of profiles. In the second (right) example, the system queue is only used in one display queue, and the skill is only used in this queue and not used in any profiles.

If you choose to delete only the system queue or both the queue and the skill, you should check if the mentioned system queues, display queues and profiles need to be updated.

If you are in any doubt whether you should delete a system queue and possibly the skill, do not delete queue and/or skill!

If you delete a system queue and possibly a skill, it will be shown in the **Change log**.

7.6.2.3 SLA

SLA's are used to prioritise between requests waiting in different queues. SLA's can be regarded as service-goals per queue, e.g. emails to support shall be answered within 5 hours, while telephone calls to sales shall be answered within 30 seconds.

A request that waits in a queue has at any given point in time an SLA-score.

$$SLA\ score = \frac{\text{The request's actual wait time in queue} * 100}{\text{The queue's predefined SLA}} + \text{VIP points (if any)}$$

VIP-points are only relevant for services with VIP features, giving certain callers priority.

Please note that if an SLA is not defined for a queue, any VIP points given to a request arriving in this queue is ignored when prioritising requests.

Examples

- 120 seconds waiting time in a Queue with SLA=60 seconds gives SLA-score=200
- 30 seconds waiting time in a Queue with SLA=60 seconds gives SLA-score=50

The standard solution is that the request with the highest SLA-score is sent to the first ready agent that can answer a request from the queue.

The Queue's SLA-score in Queue overview is the request with the highest SLA-score.

7.6.2.4 SLA Overflow

By defining SLA Overflow, some requests will be waiting longer in queue for a logged on (not paused) higher skilled agent even if agents with lower skill-level are ready. Defining SLA Overflow is useful when agents are answering more than one queue and you would prefer a customer to wait a bit longer to be answered by a higher skilled agent.

By defining SLA Overflow for a queue, you define how long requests should wait for a logged on (but not paused) high skilled agent before a lower skilled agent should be used.

Using the SLA Overflow functionality may result in a less effective distribution of requests. You may experience situations where customers wait a long time for a higher skilled agent when a less skilled agent is ready, but end up with a lesser skilled agent anyways, since the higher skilled agent does not become ready within the defined period. If you want to define SLA Overflow, we advise you to consult with Puzzel first.

The different SLA columns you can configure:

System Queue Name	Media type	Task	Skill	S.L.A (sec)	Alternative S.L.A (sec)	Overflow 1 (score)	Overflow 2 (score)	Wrap-up (sec)	Call Recording	Enquiry registration categories
1. Sales	📞	<input type="checkbox"/>	Sales (Skills)	30	0	200	400	90	<input type="checkbox"/>	Test category, Sales
2. Support	📞	<input type="checkbox"/>	Support (Skills)	20	30	200	300		<input checked="" type="checkbox"/>	Complaint, Technical issues
3. Switchboard	📞	<input type="checkbox"/>	Switchboard (Skills)	30	0	100	100		<input type="checkbox"/>	[All default]
Chat Sales	💬	<input type="checkbox"/>	Sales (Skills)	25	60	150	200		<input type="checkbox"/>	Sales, Technical issues

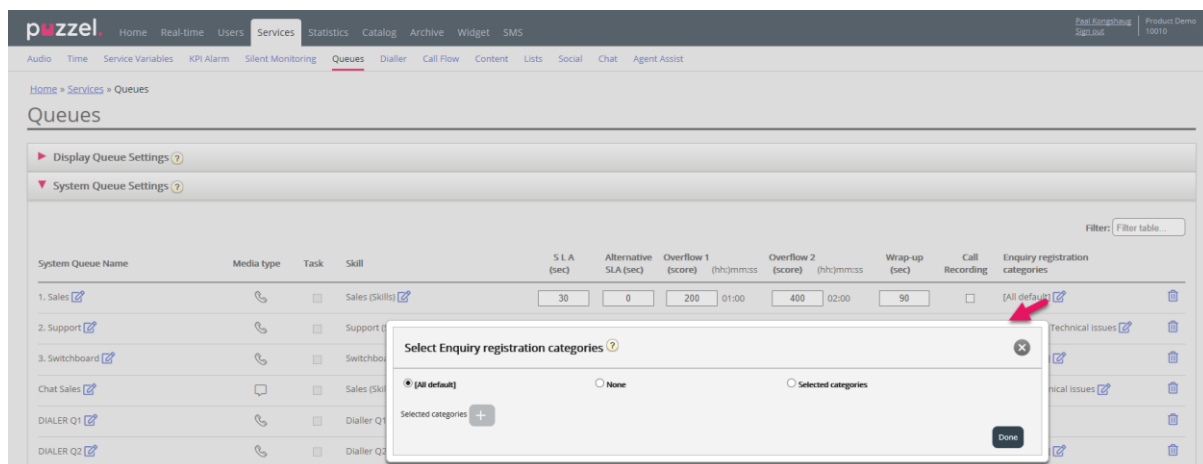
- **SLA (sec):** The queue's SLA in seconds. The lower the value, the more important this queue is relative to other queues when requests are prioritised. If SLA is 0, it means that this queue is less important than queues with SLA>0. SLA=0 can be useful for example for Email queues if you don't want emails to be sent to agents when there are calls waiting in a queue. Alternatively, set very high SLAs for email queues. We **recommend** that you define an SLA >0 for all phone, chat and social queues.
- **Alternative SLA (sec):** Default=0 (=not in use). Define a value >0 only if you want the calculated *Answer rate within SLA* in the Ticker Queue, Wallboard and in the agent application's queue overview to be based on the Alternative SLA instead of based on the "real" SLA. Please note that this does not change how requests are prioritised.
- **Overflow 1 (score):** Default=0 (=not in use). If you define a value > 0, e.g. 200 (a SLA-score, not seconds), requests in this queue only "look" for agents with skill level 6-9 (the best ones) before the requests have a SLA-score higher than the defined SLA Overflow 1 value. The score's corresponding mm:ss value is shown.
- **Overflow 2 (score):** Default=0 (=not in use). If you define a value for SLA Overflow 1 (e.g. 200), you have to define a value (SLA score) for SLA overflow 2 that is \geq the value for SLA overflow 1. If you only want Overflow 1, set the same value for SLA Overflow 1 and 2. If SLA overflow 2 is set to e.g. 300, requests in queue only look for agents with skill level 3-9 when requests have a SLA-score between the two defined SLA overflow values (here between 200 and 300). Requests in queue with SLA score > the defined SLA overflow 2 value will look for agents with skill level 1-9. The score's corresponding mm:ss value is shown.

7.6.2.5 Enquiry registration per queue

On page *Users – Enquiry registration* you define Categories and their belonging topics to be used by the agent application. All Categories are shown for all agents (all user groups) unless you have limited what categories to show for each user group by using resource filters with categories.

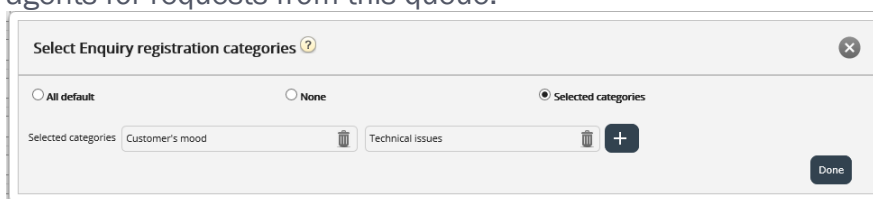
You can configure what categories to be used per queue instead of using resource filters to limit what categories different user groups can see.

The standard solution is that "All default" categories are shown for all your queues.



You can click on the edit pen in column *Enquiry registration categories* for a queue row to select between *All default*, *None* or *Selected categories*.

- **All default** means that all categories checked as “default” on page *Users – Enquiry registration* are shown for agents for requests from this queue.
- **None** means no categories will be shown for agents for requests from this queue.
- **Selected categories** means that the categories you selected here are shown for agents for requests from this queue.



If one category should be used for one or only a few queues only, and you have other queues that should use *All default* categories, you should uncheck “default” on page *Users – Enquiry registration* for this Category so that it is not included in “All default”.

For Dialler campaigns you can select a category reserved for Dialler to be used. This is done on page *Services – Dialler* under *Agent feedback*. If a Dialler campaign queue uses a category reserved for Dialler, this Dialler category is not shown on page *Services – Queues*.

7.6.3 Allocation Algorithms

Different algorithms are used in these two different situations:

1. **No queue** - A request arrives in a queue (nobody is waiting in), so the request can ‘choose’ among several ready agents. The ready agent with the highest skill score on this queue (which equals the level on the media type and the ordinary skill(s)

the queue consists of) is chosen, but if more than one agent has the same skill score on the queue, agent is chosen based on one of these algorithms:

- **Time of allocation:**
Choose the agent that it is the longest time since last was offered a request
- **Finish time:**
Choose the agent that has been ready for the longest time

2. **Queue** - an agent becomes ready (ends call wrap-up, finishes a chat, logs on, ends pause) and no requests in queue are reserved to this agent, but requests are waiting in at least 2 queues the agent can answer:

- **Standard:**
Choose the request with the highest SLA-score among the queues the agent can answer. (If SLA Overflow is configured, this has an impact on the allocation.)
- **Alternative:**
Choose the request with the highest SLA-score from queue(s) the agent has highest skill score on.

Please contact Puzzel support if you want to change algorithm.

7.6.4 Reserved/preferred agent

If you want a caller/chat/email/social media request in queue to be connected to the same agent as last time, Puzzel support can configure *Reserved agent* for the selected queue. Two parameters must be configured:

- **Auto-store reserved agent (d):** *How many days to store which agent an answered customer's call/chat/email/social media request was last connected to. As customer id here we use the caller's number, the chatter's id (email address), the email's sender and the "source" from a social media request.*
- **Reserved agent (s):** *How many seconds an incoming call/chat/email/social media request should wait for the reserved agent only (if found in the 'Auto-store' table). After x seconds, the request has this agent as preferred, and the request can be offered to other agents (when it is "first" in queue).*

For a Facebook public post and the belonging comments, we treat all users commenting on the same post as the same end-customer when we are looking for a reserved agent for a new request related to this post.

For incoming calls, chats and social media requests, the request's reserved agent will change to *preferred* if the agent is logged off now or if he logs off during the reserved time.

For incoming emails (including etask/scheduled tasks), the agent will be kept as reserved for the defined reserved time even if the agent is logged off or logs off.

- If you put **email/e-task** in queue using Puzzel's web-services requestAdd, you can provide information about each request's reserved agent and reserved time
- If you put **Scheduled tasks** in queue using Puzzel's web-service RequestScheduledETaskAdd, you can provide information about each request's reserved agent and reserved time. If no reserved time is given for the request, the pre-defined Scheduled task reserved time is used.

Allocation of requests with a reserved agent

- When an agent becomes ready, and there is a **phone call** in queue reserved for this agent, this call will be sent to this agent even if the agent is not logged on to the queue the reserved request is waiting in, and even if this request is not first in queue.
- If there is a request in a **Chat** or **Social media** queue reserved for an agent, the request will be sent to this agent only if the agent is logged on with a profile containing the relevant media type (Chat or Social media).
- If there is a request (email/e-task/scheduled task) in an **Email** queue reserved for an agent, the request will be sent to this agent even if the agent's current profile does not contain media type Email. If an agent accepts an email/scheduled task request while not having Email in his profile, the agent gets status *Connected*, and therefore the agent cannot make an outbound call. However, if the agent's profile contains media type Email while the email/task request is accepted, the agent gets status *Ready (1)* or *Busy (1)*, and then the agent can make an outbound call while the email/task request tab is open.

Alternative allocation of requests with reserved agent (in email queues)

For email/etask queues, the standard allocation of requests with a reserved agent might not always be the "best" solution, since an email reserved to an agent might not be more important than other emails/chats/calls in queue with (much) higher SLA scores.

To adjust the standard behaviour for requests with a reserved agent, option 1 or option 1 and 2 below can be chosen for one or more of your queues:

1. Allocate request reserved to agent **only if agent is logged on to the relevant queue** (aka 'Require Skill on queue for Reserved')
2. Allocate request reserved to agent **only if request is "first" in queue** ('Require First in queue for Reserved')

For phone queues you can consider option 1, but we do not recommend option 2 since this might result in (significantly) longer wait times for callers with a reserved agent.

For email queues we recommend option 1 if agents should not get emails when not logged on to the email queue, or 1+2 to avoid that emails with a reserved agent are prioritized before calls/chats without a reserved agent.

If you want to turn on one of or both these options for one or more of your (email) queues, please contact Puzzel support.

7.6.5 Max number of requests in queue and max time in queue

To protect the Puzzel platform and your Puzzel solution from being spammed by "false" web callback orders and spam emails sent to Puzzel queues (as emails or by using web-service requestAdd), we check if the queue is full before putting a new email/web callback into queue.

The maximum number of requests allowed in **email** queues and in phone queues for **web callback** can be configured by Puzzel, per queue. If no such Maximum value is defined for a queue, we will allow max 1000 requests in an email queue and max 1000 web callbacks. Please contact Puzzel support if you want to allow more (or less) than 1000 emails or web callbacks in a queue, so that we can set "correct" Max values for your queues.

For incoming calls, it can be defined a Max number of calls in queue (per queue), and if a max value is defined for one of your queues, it must be defined what to do with callers that are routed to the Queue and are rejected/sent to the Full exit.

For **chat** queues, the default Max number of requests in queue is 30. Please contact Puzzel support if you want to define another max value than the default.

Please note that for media type **email** (used for email, etask and scheduled task), the **max allowed time in queue is 60 days**. If a request stays in queue for 60 days, Puzzel will delete it.

If this happens, it is probably because you forgot these requests and no agents answer this queue anymore. As an administrator, you can delete (old) emails in queue from

Queue Details (under Real-time – Queue overview) if you know these emails/etasks should or will not be sent to agents.

For the real-time channels (phone, social media and chat), the customer will hang up if he is not allocated to an agent within a reasonable time.

Callers that ordered callback in queue are usually called later the same day, but if all agents leave for the day before all callbacks are called, the callbacks will stay in queue for max 48 hours. An admin can delete callbacks from Queue overview – Queue details if you don't want to do yesterday's callbacks the next morning.

7.7 Dialler

7.7.1 Overview

With the Dialler, you can do outbound campaigns in Puzzel. One Puzzel Dialler **Campaign** has one list, it is linked to one system queue and it has its own configuration. There may be one or several Dialler Campaigns in a Puzzel solution. Only agents logged on with a profile that includes the skill for a Campaign's queue will receive calls from it.

A Puzzel campaign queue uses mode *Preview* (call agent first) or *Power, Progressive* or *Predictive* (call contact first).

The Dialler calls each contact's phone number in the Campaign's list. A file with contacts can be uploaded via the Administration Portal interface when required (e.g. daily, weekly, monthly or ad-hoc) or you/a system can put a file on Puzzel's secure FTP server when you want. (Puzzel will detect a new file and import it). When a new file is imported, you can select if this file's content should REPLACE the existing Campaign list content or if the file's content should be ADDED to the Campaign list. In addition, you can use the Dialler API (<https://api.puzzel.com/dialler/>) to add, edit and delete single contacts.

Information about the contact called (e.g. name, age, address, interests) can be presented for the agent in a Puzzel screen-pop (information from the list) and/or in an external (CRM) system.

The agent can register the outcome of the conversation in the Enquiry registration part in the agent application, or in the CRM system where the contact information was shown.

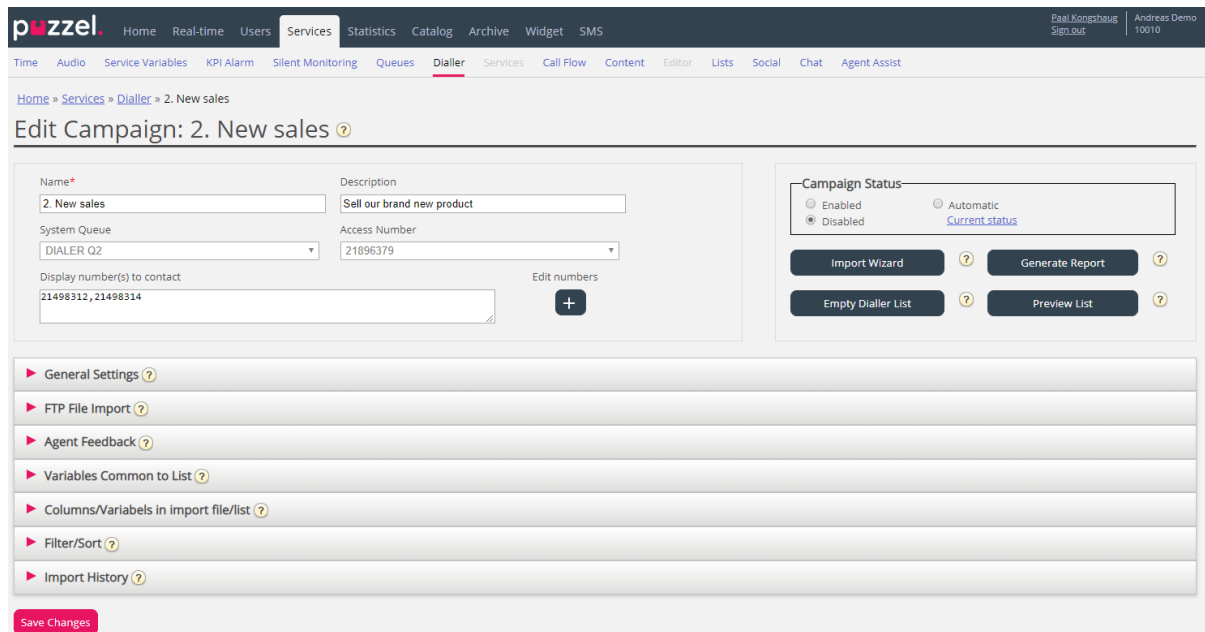
On the Dialler main page, you will see the defined Dialler Campaigns:

Name	Description	System Queue	Dialler mode	Calls per Ready agent	Calls per agent in Wrap-up	Active
1. Win-back	Win-back campaign for product X	DIALER Q1	Preview (Call agent first)			No
2. New sales	Sell our brand new product	DIALER Q2	Progressive (Call contact first)	1	0	No
Campaign 3	Special campaign	DIALER Q3	Power (Call contact first)	1.7	0.1	No
Campaign 4	My brand new campaign	DIALER Q4	Predictive (Call contact first)			No

Click on a Dialler Campaign's Name to open its *Edit Dialler Campaign* page. On the Edit Dialler Campaign page, you can see and edit details for the chosen Campaign.

When all configurations are done and a file's content is imported into the list, you can change Campaign status to *Enabled*. Contacts will be called only if enough agents are logged on, the Campaign is enabled and it's within the defined time interval(s). Some

contacts will be moved from the list into the queue each minute (according to the config), so that the queue has contacts to call.



Campaign status

We recommend that you disable a campaign each afternoon/evening when no more contacts should be called, and then enable it the next day you want to call contacts. Shortly after a campaign is disabled, the contacts already in queue are deleted.

If you don't want to manually Enable/Disable a campaign each day, you can select Campaign status = "Automatic" to let the system automatically enable it during the "opening hours". Please note that if you have defined more than one time period under General settings, the campaign will be enabled at the earliest defined *From* time and disabled at the latest defined *To* time. The campaign will not be disabled in the gaps between the time periods, but new contacts will not be put into queue in these gaps.

7.7.2 Dialler modes

There are 4 available Dialler modes:

Dialler mode	Comment
Preview (call agent first)	When agent answers the call, the contact is called
Progressive (call contact first)	No overdial. 1 contact called for each ready agent
Power (call contact first)	The customer admin configures the overdial
Predictive (call contact first)	The Dialler predicts how much overdial to do.

For Power and Predictive mode, the overdial temporarily stops if the *Silent call rate* so far today now is greater than the defined *Target Silent call rate*.

7.7.2.1 Preview - Call agent first

With this mode, the agent is called first, and information about the contact that will be called is presented in the Agent application's screen-pop and/or in the agent's CRM system. When the agent has answered the call (e.g. after 15 seconds), the contact is called. The call might be answered, the number may be busy, or the contact may not answer within the defined max ringing time or the agent concludes 'no answer' and hangs up when it's ringing. With this mode, the agent is prepared, and there will be no silent calls.

Please note that the default Max ringing time for calls to contact (when agent is on the line) is 120 sec. On request, Puzzel can change this (ciq_ringing_timeout) value to e.g. 29 sec, so that you can tell agents to hold the line until answer or automatic disconnect due to ringing timeout!

To speed up the process, agents can turn on auto-answer on their Puzzel Softphone. This is sometimes called "forced preview".

7.7.2.2 Important about the 3 "call contact first" modes and Silent calls

Progressive, Power and Predictive mode should only be used if the agents use the Puzzel Softphone (the Puzzel agent application will automatically auto-answer calls from such Dialler queues). Without immediate auto-answer from the agent's phone, these modes will result in almost only "silent calls".

Automatic logoff after x error calls (default = 5) should not be turned off for agent user groups that answer Dialler calls, since this will cause lots of silent calls if an agent leaves his seat without clicking *Pause* or *Log off*. See Users – Products - [Logon to Queue](#)

What is a silent call?

The definitions and rules around silent calls vary between countries. Two cases where agent is not connected:

- a) If the Dialler calls to a contact's phone and receives an answer and then disconnects due to no agent connected within a few seconds, or if the contact who answered hangs up before an agent is connected, and no announcement is played to the contact, this is a "real" ***silent call***.

- b) If a contact answers and the Dialler plays a (silent call) announcement to the contact after a few seconds (since no agent was connected), this is often seen as an **Abandoned call**, and not as a real Silent call.

Both these 2 cases are reported as Silent calls in Puzzel. If you play a silent call announcement for the contact when no agent is connected within x sec, one could argue that all the reported Silent calls are actually “Abandoned” and not “Silent”.

Also, since some of the calls reported as silent by Puzzel might be the contact’s answering machine that Puzzel disconnected due to no agent available, so the real silent call rate might be lower than Puzzel reported also if no silent call announcement is played.

With Power and Predictive mode, The Dialler will call one contact for each ready agent, and in addition, the Dialler may “**overdial**”, that is, call x more contacts than there are ready agents now (x can be 0 or more). The Dialler overdials because lots of outgoing calls will not be answered, and possibly also since agents in status Wrap-up will soon become Ready.

The overdial calculation assumes that the agents logged on only answer this queue, so an agent profile containing the skill for a “call contact first” campaign must include only this skill (and phone).

7.7.2.3 Progressive mode (call contact first)

With Progressive mode, the Dialler calls 1 contact per Ready agent only, that is, no overdial is done.

Please note that there may be some silent calls due to other reasons than overdial. If an agent in status *Ready* clicks *Pause*, starts an outbound call or receives a consult/transferred call and the contact the Dialler called answers, or if the agent’s Puzzel Softphone (browser) is not available when a Dialler call is offered, this will be a silent call. To avoid silent calls, agents should click *Pause/Log off* only while in Wrap-up.

7.7.2.4 Power mode (call contact first)

With Power mode, you can configure the dialling pace yourself. The parameters that influences the pace (in addition to Target Silent call rate) are:

- Calls per ready agent: Recommended value 1.6 (1.0 means no overdial, max is 3)
- Calls per agent in wrap-up. Default 0

If you have lots of agents and/or a very short avg. wrap-up time, you can set the *Number of contacts to call per agent in wrap-up* to e.g. 0.2 or 0.3.

The Dialler continuously calculates the correct overdial number based on these 2 parameters and the number of agents in status Ready and Wrap-up, and the calculated value is rounded down before deciding if a new contact should be called.

If the Silent call rate so far today is greater than the target, the overdial temporarily stops.

7.7.2.5 Predictive – Call contact first

With Predictive mode, the Dialler tries to minimise the agents' idle time (waiting for an answered contact) while trying to keep the silent call rate below the defined target. If the number of agents logged on is less than 10, the idle time for agents might be long, and the silent call rate might be higher than the defined target.

The Dialler continuously calculates the optimal overdial value primarily based on the number of agents, the answer rate, and actual Silent call rate so far today compared to the Target silent call rate, before deciding if a new contact should be called. If the Silent call rate so far today is greater than the target, the overdial temporarily stops.

7.7.2.6 Call blending

If you want your agents to do outgoing calls when no incoming calls (or chats/emails) are waiting in queue, we recommend that agents use a profile containing one or more inbound queue skills and the skill for one or more Preview mode Campaigns. The inbound queues must have SLA >0 and the Campaign queues must have SLA =0 so that inbound is always prioritised.

Do not include a “call contact first” queue's skill in a profile together with inbound skills, since this will result in silent calls.

7.7.3 Import Wizard and File Format

Click the *Import Wizard* button to open the window where you can upload a new csv/txt file from your computer. If the previewed file looks ok, then click *Start import*. You can choose between ADDING the file content into the existing list content and REPLACING the existing list content with the content in this file. *Replace* is the system default, but you can store *Add* as your default.

File Import Wizard ✕

Select a .csv/.txt file: Dialer list.txt

Delimiter: Preview rows: Encoding:

When importing this file: Replace existing list content with file content Save as default selection

Replace existing list content with file content
Add file's content to existing list

Start Importing

phone_num	var1	var2	var3	var4	var5	var6	var7	var12	external_id	date_from	date_to	time_from	time_to
26100000	Важно	клиент	m	44	a	Oslo	produkt x	blerg_h_1	1001			12:00	16:00
26100001	Martin	lastname 2	f	78	b	Oslo	produkt z	blerg_h_2	1002	2017-10-01		16:00	21:30
26100002	Truls	lastname 3	m	22	a	Oslo	produkt y	blerg_h_3	1003		2017-11-01	12:00	
26100003	Nina	lastname 4	f	35	a	Hamar	produkt x	blerg_h_4	1004	2017-10-01	2017-11-01		16:00
26100004	Jan	lastname 5	m	46	c	Bergen	produkt x	blerg_h_5	1005				

The contact's *phone_num* is the default **Key** field, but you can choose to use *external_id* as Key instead. If a **Unique Key** is required or not, is configurable (default not required).

1. If Unique key is required and an uploaded file contains **duplicates**, the duplicates are listed, and you are not allowed to import the file.
2. If Unique key is required and you start importing a file (without duplicates) that should be added to the existing list content, and the file contains a contact with a key that already is in the existing Dialler list, the import is stopped/reversed, and the duplicates are listed.
3. If Unique key is NOT required and an uploaded file contains **duplicates**, a warning is given (the duplicates are shown) and you can import the file with duplicates.
4. If Unique key is NOT required and you start importing a file (without duplicates) that should be added to the existing list content, and the file contains a contact with a Key that already is in the Dialler list (a duplicate), no warning is given, and the file is imported (since you did not require a unique key).

If a contact's *phone_num* is empty or contains letters, brackets or spaces, this contact is listed as "Illegal phone number" in the Import Wizard. If you click *Start importing*, contacts with Illegal phone number are not imported.

Please note that this phone number validation is not used when files are imported using **FTP**.

- **Delimiter:** If a csv/txt file is imported and you get a red box around the header row when Delimiter = auto, try changing delimiter to ; (semicolon) or , (comma).
- **Encoding:** If the file has UTF-8 encoding, all text should be show correctly (with Encoding = (auto)). If the file doesn't have UTF-8 encoding, you can select ANSI-Latin for a Norwegian/Danish/Swedish list (due to æ/ø/å and ö/ä/å) and Cyrillic (Bulgarian) for a Bulgarian list.

File format for Dialler list

- **.csv or .txt** files with comma, semicolon or tab as delimiter. We recommend **UTF-8 encoding**. If you use Microsoft Excel to save the list as a csv or txt file, please choose *CSV UTF-8 (*.csv)* as Type.
- If Puzzel should fetch files on Puzzel's FTP server, the **file name**, extension and delimiter must match the pre-defined values under accordion FTP file import. In addition, the column headers in the file must be correct. Files imported using the Import wizard can have any file name.
- The **first row (header)** must contain the column names: **phone_num** (required) and optionally **var1-var30** (as many as you need) and optionally **date_from**, **date_to**, **time_from**, **time_to** and/or **external_id**. The columns can be **in any order**.
 - **phone_num** is the contact's phone number to be called.
 - The optional columns **var1-var30** can contain information about the contacts, e.g. name, age, address etc and/or a (part of a) URI. The content in one or more variable columns can be presented to the agent in a screen-pop, or a URI can be used for 'CRM pop' to open the contact in an external system.
 - If **external_id** is defined as the key, **external_id** is required
- Max. 10.000 records in a file manually uploaded to the Administration portal, and max 200.000 records in a file fetched on Puzzel's FTP server.
- Max 1024 characters in the values in columns var1-var30.

Field	Description
phone_num	The contact's phone number. Required . No spaces or brackets. Prefix 00 or + and country code required only for foreign numbers*. Example: +443333000066, 00443333000066 and 03333000066 will work, but <i>not</i> +44(0)3333000066. Please note that if you want to use the API to delete a contact (without an external_id), you can not use "+" since the API does not support it.
var1-var10	Basic variables. Max 1024 characters for each. Optional.
var11-var30	Extra variables. Max 1024 characters for each. No Filtering support. Optional.
date_from	yyyy-mm-dd, yyyy.mm.dd or yyyy/mm/dd Earliest date to call the contact. Optional. **
date_to	yyyy-mm-dd, yyyy.mm.dd or yyyy/mm/dd Call contact until (but not including) this date. Optional **
time_from	hh:mm. Earliest time of day to call the contact, in local time ***
time_to	hh:mm. Latest time of day to call the contact, in local time ***
external_id	Required only if configured that Key=external_id.

- * Outside this Puzzel customer solution's defined (main) country.
- ** The date format used when presenting dates in Preview list and Detailed report is yyyy-mm-dd
- *** The values for *time_from* and *time_to* are assumed to be in local time, that is, the same time zone as the Puzzel customer's configured Time zone. Please note that *time_to* is actually the latest time a contact should be put into queue, which means that a contact may be called some minutes after its *time_to* if there are lots of contacts in queue.

The field names are not CAPS sensitive.

If you configured “require unique phone_num” in your list, please note that if you have 2 contacts with the same national phone number (e.g. 987654321), and one of them includes the country code (e.g. 0047) and the other doesn't, both these contacts are seen as unique.

7.7.3.1 Max list size / automatic deletion of old contacts

A Campaign's list can contain max 400.000 contacts. If you use *Add* instead of *Replace* when you upload new files, the list might become huge if you never empty the list.

To avoid having very old and not-relevant contacts in the list, we will each night, in lists with more than 5000 contacts, delete contacts that

- were imported more than 365 days ago, or
- are “finished” (answered or all call attempts are done) more than 31 days ago, or
- have a *date_to* more than 31 days ago

7.7.4 Preview list, Search and Disable contact from list

Click *Preview List* to see the list content. Only the first 100 contacts will be displayed initially. Please note that filters may have been defined limiting what you see, but you can uncheck *Use defined filter(s)* if you want to see/search in the whole list and not only the filtered content.

Called number	Var1	Var2	Var3	Var4	Var5	Var6	Var7	Var8	Var9	Var10	Disable
99	Per	Hansen	m	1	a	Oslo 1	produkt x	-	-	-	<input type="checkbox"/>
97	Kari	Nilsen	f	2	b	Oslo 2	produkt z	-	-	-	<input type="checkbox"/>
22	Nina	Olsen	m	3	c	Oslo 3	produkt z	-	-	-	<input type="checkbox"/>
94	Ole	Be	f	4	a	Oslo 4	produkt x	-	-	-	<input type="checkbox"/>
48	Per	Be	m	5	b	Bergen	produkt y	-	-	-	<input type="checkbox"/>
40	Truis	dal	f	6	c	Bergen	produkt x	-	-	-	<input type="checkbox"/>
55	yvind	Klok	m	7	a	Bergen	produkt z	-	-	-	<input type="checkbox"/>
97	Olga	Be	f	8	b	Bergen	produkt z	-	-	-	<input type="checkbox"/>
77	Petra	Nilsen	m	9	c	Bergen	produkt x	-	-	-	<input type="checkbox"/>

You can search for contacts by entering text or a phone number, and you can use * as a wildcard. Example searches:

- hans* shows all records beginning with hans
- *123 shows all records ending with 123
- 12345678 shows all records equal to 12345678

If you want to exclude a contact from the active list, so that the Dialler does not call the contact's number (again), just check the *Disable* box in the right column for this contact.

7.7.5 General Settings

▼ General Settings (?)

Time Intervals: Period 1: 00:00 - 23:59; Period 2: - -; Period 3: - -; Period 4: - -

Limit to Dates: From: -; To: -; Exclude Saturdays; Exclude Sundays; Enable rescheduled calls "to myself" when campaign is disabled

Max. number of calls per contact: 4; Min. minutes between retries: 5; Max. number of contacts in queue: 10; Dialler mode: Preview (Call agent first)

▶ FTP File Import (?)

- **Time intervals/Limit to dates:** Define at least one time period and optionally *From* and *To* dates for the campaign. Only rescheduled contacts will be put into queue outside the defined time period(s). If you define more than one time period, they can't be overlapping. If *Max. number of calls per contact* is >1 and you have defined 2 or more periods, the Dialler will call contacts in the first period, and the contacts that did not answer will usually be called in the next period.
Example: With *Period 1* set to 09:00-15:59 and *Period 2* set to 16:00-20:59, and *Max. number of calls per contact* set to 3, the first call to a contact will be done in Period 1, and the contacts that (were not called or) did not answer in Period 1 will usually be called in Period 2, and the contacts that (were not called or) did not answer in Period 2 will usually be called in Period 1 the next day.
- **Enable rescheduled calls "to myself" when campaign is disabled:** If an agent orders rescheduling "to myself", and the campaign is disabled at the rescheduled time, the call will be done only if this option is checked and the agent becomes ready at or max "Minutes reserved to this agent" minutes later.
- **Max number of calls per contact:** If a call to a contact results in error, busy or no answer, the Dialler will call the contact again later (in the next Period if more than 1 Period is defined), unless this was the last call attempt. If the contact (or the contact's voicemail) answers, the Dialler will not call the contact again, unless the agent selects "[Mark as unanswered](#)" or orders [Rescheduling](#).
If Predictive mode is used and a call to a contact results in a silent call, the Dialler will not call this contact again, unless "Silent call callback" is activated.
Please note that if you change value for Max number of calls per contact, this

affects the contacts already in the list. If you e.g. increase from 3 to 4, the Dialler will call contacts that already have been called 3 times without answer one more time.

- **Min. minutes between retries:** If a call to a contact in the list results in error, busy or no answer, the Dialler will call this contact again (if more tries are left), but it must be at least x minutes until the next call. (Max 2880, which is 2 days.)
- **Max. number of contacts in queue:** The list may contain lots of contacts to call. Each minute new contacts are put into queue from the list so that the number of contacts in queue is as many as defined. For a queue with Preview mode, you should use a value 2-3 times greater than the max number of agents logged on. For a Predictive mode queue, we recommend a value at least 4 times greater than the max number of agents logged on.
- **Dialler mode:**
 - *Preview (call agent first)*
 - *Progressive (call contact first)*
 - *Power (call contact first)*
 - *Predictive (call contact first)*

Please note that the “call contact first” modes require Puzzel Softphone (or an external phone that gives immediate auto-answer) to avoid lots of silent calls.

When Progressive/Power/Predictive (call contact first) mode is selected, more parameters appear:

- **Max ringing time:** How long the Dialler should wait for an answer for an outgoing call to a contact, before hanging up (this parameter is only for the call contact first modes). Recommend value 19-29 seconds. (Forwarding to voicemail typically happens after 30 seconds). Minimum 10 sec, maximum 120 sec.

- **Target Silent call rate** (for Power and Predictive): Default is **3.0%** (allowed range 0-10%). Silent call rate = number of silent calls / (number of silent calls + number of answered calls). Please note that this is a much “stricter” definition than Silent calls / Total calls. With Power/Predictive mode, the Dialler will overdial to try to minimise the agents idle time between finishing a call wrap-up and receiving a new answered call, while trying to keep the Silent call rate just below the defined target.
- **Abandon if no agent allocated within sec:** How long the Dialler should wait for a Ready agent to be allocated after the contact answered, before Puzzel should (play an announcement and) disconnect the call. Default and recommended value is **3.0 seconds**. If contact is disconnected, this is categorised as a “silent call”. If the contact hangs up before an agent is allocated (or before agent answers), this is also a ‘silent call’. If you want an announcement to be played for the contact when Puzzel disconnects, please ask Puzzel to configure this.
- **Disconnect if no answer from allocated agent within sec:** How long the Dialler should wait for an answer from the allocated agent’s phone before (playing a silent call announcement and) disconnecting the contact. Default value is **3.0 seconds**. (Minimum 2, maximum 5 seconds). Usually it takes ~1 second from agent is allocated till answer is received from Puzzel Softphone. This timer is needed e.g. if an agent logs on with an external phone without auto-answer or if an agent is ready and his browser running Puzzel is unreachable.
- **Silent call callback:** Default behaviour is that after a silent call, the contact is not called again. If you check this option, Puzzel will as soon as possible after a silent call happened call the contact again, but this time the Dialler will call an agent first. If this silent call callback to the contact is not answered, the Dialler will not call the contact again.
- **Screen-pop to agent for silent call callbacks:** If you turn on “silent call callback”, the agent that receives the call will receive the text defined here, e.g. “Contact experienced a silent call” in the screen-pop variable `reschedule_comment`.
- **Calls per Ready agent** (Power mode only): Number of contacts to call per ready agent. Typical value is 1.6, and the value must be between 1.0 and 3.0 (1.0 means no overdial). The calculated value for calls to be done (agents ready * Calls per ready agent) is rounded down.
Example: With Calls per ready agent = 1.7 and 1 agent ready, 1 contact is called. With 2 agents ready, (2*1.7=3.4 ->) 3 contacts are called.

If *Calls per agent in Wrap-up* is >0, the calculated value for calls for ready agents and calls for agents in wrap-up is summarized before being rounded down.

- **Calls per agent in Wrap-up** (Power mode only): Number of contacts to call per agent in Wrap-up. Default=0 (which means no overdial due to agents in wrap-up). The value must be between 0 and 0.5. If set to e.g. 0.3 and 2 agents are now in wrap-up, the calculated value is 0.6. We recommend 0 unless you have many agents and a short avg. wrap-up time.

Example: *Calls per ready agent* = 1.7 and *Calls per agent in wrap-up*=0.3.

With e.g. 1 agent ready and 3 agents in wrap-up, the result is $(1*1.7 + 3*0.3 = 3.4 + 0.9 = 4.3 \rightarrow)$ 4 contacts are called.

7.7.6 FTP File Import

If you want to upload files to Puzzel's FTP server (using FTP over SSH) e.g. once a week that should be used by the Dialler, please contact Puzzel support to get an FTP user account. In addition, you must configure some parameters:

- **Import file from FTP server:** Must be checked if the Dialler should look for and upload files from Puzzel's FTP server
- **File name:** Define the file name you will use (e.g. dialler-Q1-list.csv)
- **Delimiter:** Choose the correct delimiter.
- **Add or replace:** Select the desired way to treat a new imported file.

When *Enable* is checked, Puzzel will look for files every minute in the folder called 'Dialer' on the FTP server. When Puzzel finds a new file with correct file name on the FTP server, this file is imported, and its content replaces or is added to the existing list content in Puzzel. Please note that a new file found on FTP is imported even if the Campaign is enabled. The file is then automatically deleted from the ftp folder, and you will in the *Import history* find a new row that shows the file name, date/time and number of rows imported.

7.7.7 Agent Feedback

7.7.7.1 Configuration

▼ Agent Feedback ?

Allow agent feedback <input type="text" value="Yes"/>	Category used for agent feedback <input type="text" value="Campaign"/>	Call same agent when rescheduled <input type="text" value="Yes"/>	Minutes reserved to same agent <input type="text" value="20"/>
----------------------------------------------------------	---------------------------------------------------------------------------	----------------------------------------------------------------------	-------------------------------------------------------------------

If the agents should be able to give feedback (select an Enquiry registration topic (sometimes called “call outcome”) and/or order *Rescheduling* and *Mark as unanswered*) in the agent application, *Allow Agent Feedback* must be set to Yes and you should select/change values for:

- **Category used for agent feedback:** If you want the agents to have a set of “call outcomes” to choose from, you must define an Enquiry registration Category with Topics (under [Users - Enquiry Registration](#)) and define it as *Reserved for Dialler*, and then select it here.
 - Typical outcomes (Enquiry registration topics) for Dialler calls are:
 - *Interested*
 - *Not interested*
 - *Voicemail*
 - *Wrong number/person*
 - *No answer**
- * Not needed if you only use Predictive (call contact first) since agents are not called if contact doesn't answer first. Recommended for preview (call agent first) mode.
- **Call same agent when rescheduled:** If the agent wants to order rescheduling after having been connected to the contact (=call back to the contact later), the agent can choose a reschedule time and choose if the rescheduled call should be sent to himself or any agent. The selection here (Yes/No) is just the default value in the Agent application, but the agent can set a different value (to myself/to any agent) for individual calls when needed. Please note that if an agent orders rescheduling for a call from a *Predictive mode (call contact first)* campaign, Puzzel will at the rescheduled time call the agent first, and when the agent has answered, the contact will be called.
- **Minutes reserved to same agent:** If a rescheduling is registered “to myself”, and the reserved agent is logged on but not Ready at the reschedule time, the contact is reserved for this agent for x minutes. After x minutes, the contact is sent to any agent on the queue.

7.7.7.2 Mark as unanswered

If a call to a contact's number is answered by an answering machine/voicemail (preview or predictive mode), the Dialler will not call the contact again unless the agent selects *Mark as unanswered* or reschedules.

We recommend that when an agent is connected to an answering machine, the agent hangs up and selects a topic (e.g. "Voicemail") and "Mark as unanswered".

If the call to the contact's number is answered by the "wrong" person (e.g. spouse or children), the agent can select e.g. "Wrong person" (or any topic) and "Mark as unanswered" or reschedule.

If the agent selects "Mark as unanswered", the contact's status in the Dialler list will be changed from *answered* to *not answered*, so that the contact will be called again later (ref *Min. minutes between retries*) unless this was the last attempt for this contact (ref *Max. number of calls per contact*).

Please note that an answered call "Marked as unanswered" will be reported as answered in real time views (Wallboard/Queue overview/Ticker), in historical statistics reports and in Raw data.

7.7.7.3 Reschedule to call contact at agreed time

If a call to a contact is answered, the connected agent can order rescheduling "**To myself**" at the desired time.

If the contact insists on being called back at a date/time the agent knows he is not working, or if any agent can/should call this contact later, the agent can reschedule "**To any agent**", which means that the first ready agent on the queue just after the rescheduled time gets the call.

If an agent reschedules a Dialler call "**To myself**", this agent becomes the "reserved agent". If the reserved agent is logged off at the rescheduled time, the call is sent to another agent on the relevant Dialler campaign. If the reserved agent is logged on but not Ready at the reschedule time, the call waits for the reserved agent for as many minutes as defined as "Minutes reserved to same agent", e.g. 20. After the reserved time, or if the agent logs off before the reserved time ends, the call is sent to another agent on the queue.

If an agent reschedules a call, we strongly recommend that the agent writes a Comment, so that this comment can be shown in the screen-pop when the call is sent to this (or another) agent at the rescheduled time.

When the agent answers a rescheduled call and the call to the contact for some reason is not answered, this contact will not be called again, unless the agent orders a **new rescheduling**. The agent can order a new rescheduling at the desired time if the call was not answered, if the number was busy, or if the call was answered by voicemail, so that this new rescheduled call appears in the user's Puzzel agent application.

Please note that if the agent registers "Mark as unanswered" for an unanswered rescheduled call, the Dialler will not call the contact again.

The *Total calls counter* can be screen-popped for the agent, so that the agent knows how many calls that have been done to the contact.

What if a campaign is disabled after agent rescheduled but before the rescheduled time?

If an agent at e.g. 12:00 while speaking to a contact orders a reschedule call e.g. the next day at 18:00, the reschedule call will be done only if the Campaign is **enabled** at the defined reschedule time (and agent(s) are logged on), **unless** "Enable rescheduled calls "to myself" when campaign is disabled" is turned on. However, if the campaign's list is deleted or replaced or if the contact is disabled at the rescheduled time, the call will not be done.

Please note that a rescheduled call without a reserved agent ("to any agent") will only happen at the rescheduled time if the relevant campaign is active and at least one agent is logged on.

Rescheduling. campaign's opening hours and contact's time from and time to

The rescheduled call will be done if the rescheduled time is outside the defined Time interval(s) for the Campaign or outside the contact's defined time_from and time_to, if the Campaign is enabled or if "Enable rescheduled calls "to myself" when campaign is disabled" is turned on.

If an agent orders rescheduling, and no agent is logged on and ready within **72 hours** after the defined rescheduled time, the contact will not be called.

7.7.7.4 Scheduled task as an alternative to Reschedule

If you want to let agents create a **Scheduled task** instead of using Dialler Reschedule when agent agrees with the contact to call back at an agreed time, the Dialler profile(s) (and other profiles) should contain media type E-mail, so that the Scheduled task can be sent to the agent at the scheduled time. In addition, *Block phone if number of written requests is greater than* should be set to 0.

We recommend that a Dialler agent is not logged on to a Dialler profile while working on a Scheduled task (agent status will be *Busy (1)*). The agent should log off the Dialler (while in wrap-up) just before a task's scheduled time, or when he shortly after the scheduled time sees the scheduled task in his Personal queue, and then log on with a non-Dialler profile.

7.7.7.5 Unanswered Preview mode calls should not be rescheduled!

In Preview mode, agents will experience calling contacts that do not answer, but the agents should not “mark as unanswered” nor reschedule an unanswered call since the Dialler will call the contact later if not all defined call attempts are done.

Since the agent has an Enquiry registration tab open for this contact that did not answer, we recommend that the agent selects topic “No answer”. The main reason is that it is easier for agents to remember “always make an Enquiry registration”, and in addition, if “[Forced Enquiry registration](#)” is used, agents must have a topic to use in this no answer scenario to be able to click Ready when in status Wrap-up.

7.7.8 Variables Common to List

Here we can define one or more variables with content that can be presented for the agent when receiving a call from this Campaign. These are variables per Campaign, not per contact called. If an SMS is sent to a contact when the contact did not answer (the 1st call), the SMS text can be put in a variable shown here.

7.7.9 Columns/Variables in Import File and list

The columns that should be used in the file and in the list is defined here:

- **Number of variable columns in list:** Default 10, max 30. The number of columns selected affects the number of variables shown here, in the *Field* list box under *Sort and Filter*, and what is shown when previewing the list.
- **Key field:** Default is *phone_no*. If set to *external_id*, each contact must have an *external_id*.
- **Unique key required:** Default No. If set to Yes, each contact in the list must have a unique value for the key field.

The used variable columns (var1-varN) can be given descriptive names. The defined names will be variable names in Puzzel, and variables can be used in the agent screen-pop. Puzzel support defines the names the customer wants to use for var1-var30.

▼ Columns/Variabels in import file/list ?

Number of Variable columns to show Key field Unique Key field required

Column	Variable Name	Column	Variable Name
var1	Name	var2	City
var3	Age	var4	Interests
var5		var6	
var7		var8	
var9		var10	

You don't need to configure if you will use date_from, date_to (earliest/latest call date), time_from and/or time_to (earliest/latest call time of day) per contact in the list.

7.7.10 Filter/Sort (In what order are contacts called?)

Sorting/filtering affects what contacts will be called and in what order. When a file with contacts is imported, each contact is given an internal_id in the Puzzel list (e.g. 1-1000). If you add a new file into the list, these new contacts will be given internal_ids greater than the existing contacts (e.g. 1001-1499).

If you want, you can define 1, 2 or 3 **sorting** criteria for the campaign's list.
Example: Criteria 1 = var3, descending, and criteria 2 = var7, ascending.

The Dialler list is sorted first based on the defined criteria (if any) and then based on internal_id, ascending. If you do not define any sorting criteria, the contacts in the list will be in the order they were when they were imported (oldest (=smallest internal_id) first).

When the Dialler **each minute** puts more contacts into queue, this is the selection order:

1. contacts with a defined **reschedule time** now (if any)
2. contacts (not answered with more tries left) that are first according to the sorting
 - Contacts with date_from, date_to, time_from or time_to that implies Dialler should not call them now are not selected
 - Contacts that are called without answer and with more tries left will not be selected if it's less than defined "Min. minutes between retries" since last call

This means that if *Max. number of calls per contact* is >1 and *Min. minutes between retries* is e.g. 60, a contact that did not answer a call at least 60 minutes ago (and more tries are left) will be selected to be called again before a contact not yet called at all.

If you don't want all the contacts in the list to be available for the Dialler, you can add one or more **filters**. You can add a filter to include or exclude some of the numbers in the list. Only the first 10 variables can be used for Filtering. The Expression used can be a single value like Male or m, or strings with wildcards like *12 (ending with 12) or 12* (starting with 12).

This is how it looks after a filter is added:

The screenshot shows a 'Filter/Sort' panel with the following sections:

- Sorting:** Three criteria are defined. Each has a 'Field' dropdown (all set to 'Select') and a 'Direction' dropdown (all set to 'Ascending').
- Filtering:** A table with columns 'Type', 'Field', 'Expression', and 'Delete'. One filter is added: Type 'Include', Field 'City', Expression 'Oslo'.
- A '+ Add Filter' button is located at the bottom left.

Click *Preview List* to see the result of your sorting/filtering, and click *Save Changes* if you want the list to be updated based on the sorting/filtering you have done.

Please note that a filter will affect the number of rows shown when you choose *Preview list*!

7.7.11 Import history

Shows files that are imported into the list in the Puzzel database. The source will be Puzzel Admin Portal or FTP.

File Name	Import Time	Action	Imported Items	Deleted	Status	Source
Dialer list.txt	19.09.2017 10:54:52	Added	10	-	Completed	Puzzel Admin Portal
Dialer list.txt	19.09.2017 10:21:33	Replaced	10	-	Completed	Puzzel Admin Portal
Dialer lang testliste med duplikat.txt	27.07.2016 15:15:50	Replaced	18	-	Completed	Puzzel Admin Portal
Dialer lang testliste med feil nr.txt	27.07.2016 14:46:33	Replaced	15	-	Completed	Puzzel Admin Portal

For a file that was not imported correctly, you can click on *Failed/aborted* in the status column to see a detailed error message.

7.7.12 Silent call callbacks can be turned on

For Predictive and Power mode there will be some silent calls:

- contact answers but no agent is available within x seconds, so Puzzel (plays an announcement and) disconnects
- contact answers, but hangs up while waiting for agent (might happen if “Abandon if no agent within sec” is too high or if the call to an allocated agent is not answered immediately or fails)

When a silent call happens, the default is that the Dialler does not call this contact again.

If you turn on “Silent call callback” (under General settings), Puzzel will, as soon as possible after a silent call happened, call an agent and then the contact that experienced a silent call.

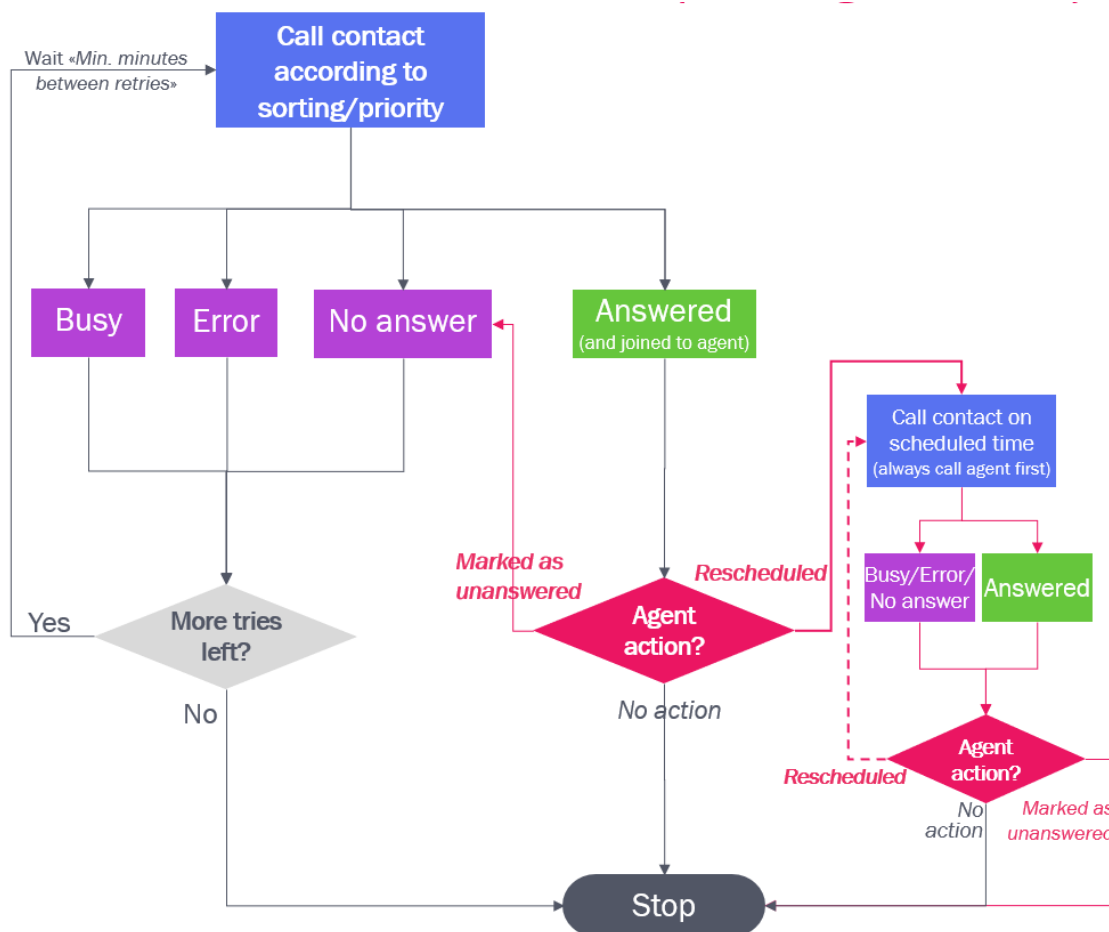
The agent that receives a “Silent call callback” will (in the screen-pop variable `reschedule_comment`) receive the text defined as ”Screenpop to agent for silent call callbacks”, e.g. “Contact experienced a silent call”.

If this silent call callback to the contact is not answered, the Dialler will not call the contact again.

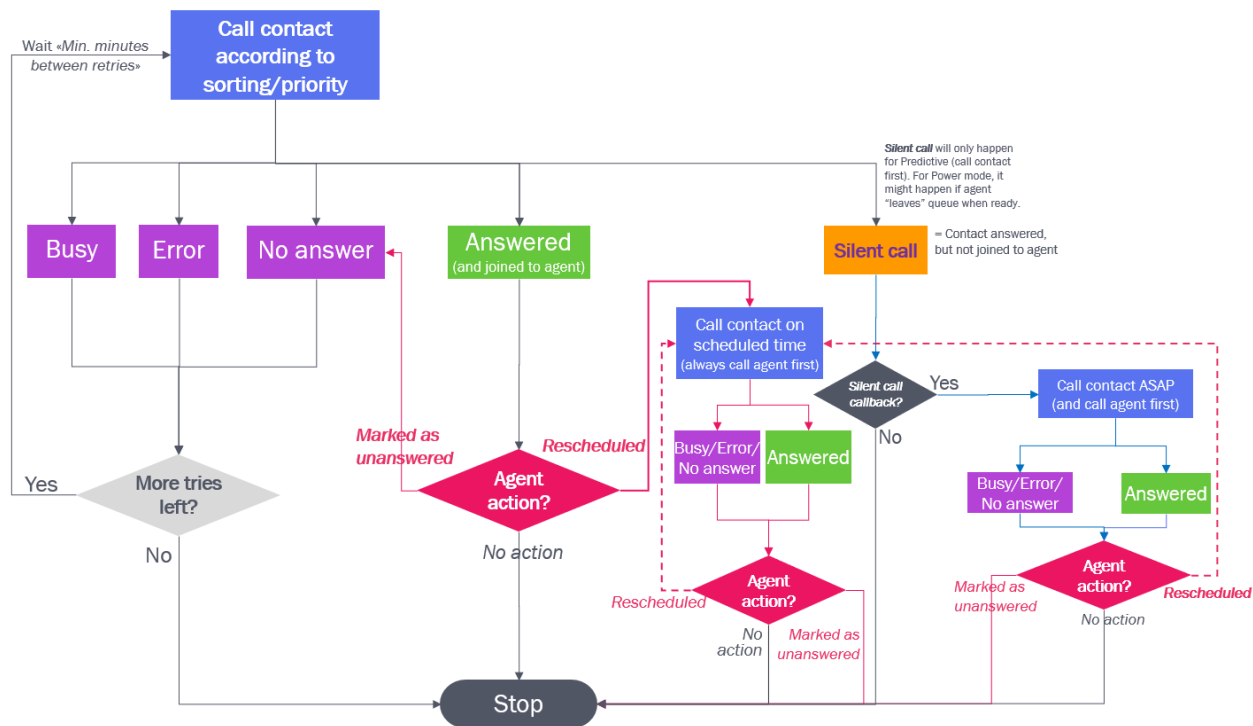
If the contact (or an answering machine) answers the “silent call callback”, the agent can order rescheduling, but if the agent chooses “Mark as unanswered”, the contact will not be called again.

7.7.13 The Dialler call logic

The Dialler logic for Preview (call agent first) mode:



The Dialler logic for **Progressive/Power/Predictive** (call contact first) mode:



Please note that a selected **topic** (e.g. “Voicemail” or “Not contacted”) in Enquiry registration done by an agent does not affect the technical call result (which is e.g. Answer, Busy, Error or No answer).

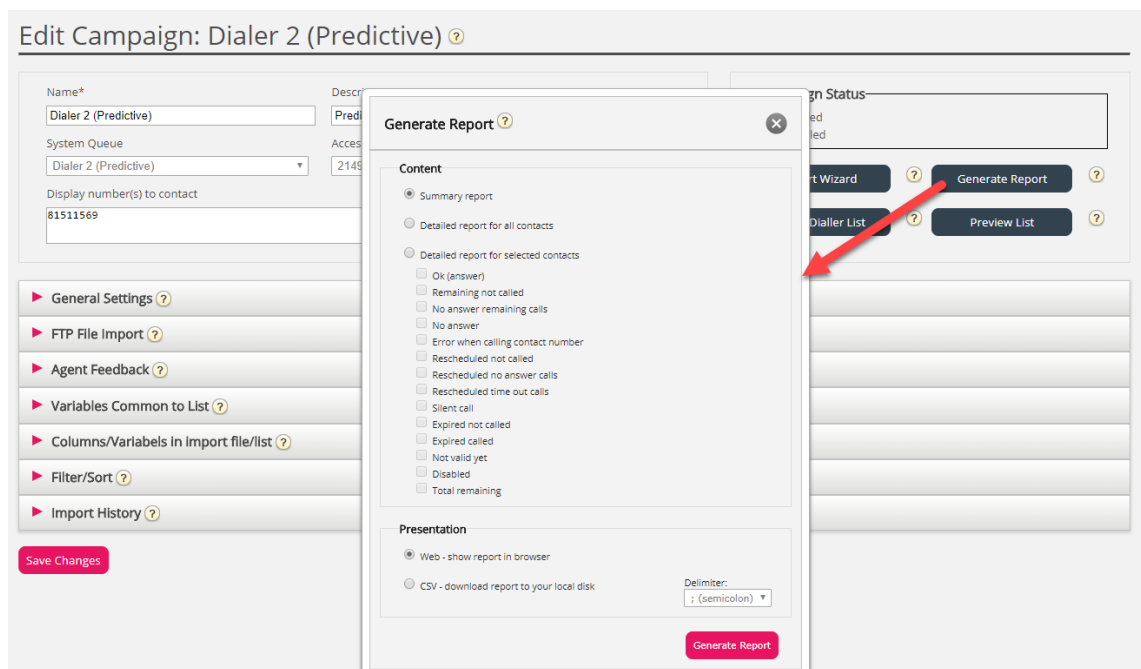
- The agent **action** *Mark as unanswered* makes the Dialler call to the answered contact once more if more tries are left and if this was not a rescheduled call or a silent call callback.
- The agent **action** *Reschedule* makes the Dialler call to the contact on the scheduled time.

7.7.14 Reporting (based on the list)

In addition to the Reporting option on the Dialler page, all Dialler calls can be found in Statistics reports, in the Archive and in Raw data regardless of the file uploads you do.

If you chose to let a new file REPLACE the existing list content, or if you want to delete the list content, you must generate the Dialler report(s) you need **before** you upload a new file or delete the list content, if you need the Dialler report(s).

Click *Generate Report* to open the window where you choose report type and content.



Summary report

The summary report shows the current list status (Enabled/Disabled), total number of contacts in the list and the **number of contacts in each of these “categories”**:

#	Name	Description/Comment
1	OK (answer)	Answer received from the contact and no rescheduling is ordered.
2	Silent call	If <i>Silent call callback</i> is OFF (the default): Contacts who answered but were disconnected or hung-up since no agent was connected within the defined max time. If <i>Silent call callback</i> is ON, a contact that experienced a Silent call will first be reported as <i>Rescheduled not called</i> , but a few minutes later the contact will be reported as <i>OK</i> or <i>No answer</i> , depending on the result of the Silent call callback.
3	No answer	Contacts the Dialler has called all attempts to without receiving an answer, and no more call attempts will be done.
4	Error	Contacts the Dialler has called all tries to, and where error signal was received for the last call. These contacts are also included in <i>No answer</i> .
5	Remaining not called	Contacts the Dialler has not called to and that are valid, not expired and not disabled.
6	No answer remaining	Contacts the Dialler has called to without receiving answer (timeout, busy and error), but at least 1 more call attempt will be done (since contact is not expired nor disabled)
7	Rescheduled not called	Contacts the Dialler has called to and got an answer from, and where the agent has ordered rescheduling, but the Dialler has not yet done the rescheduled call (Not disabled)

#	Name	Description/Comment
8	Rescheduled time out	Contacts the Dialler has called to and got an answer from, and where the agent has ordered rescheduling, but no agents were logged on and ready between the rescheduled time and 72 hours later (so the call will not be done).
9	Expired not called	Contacts not called at all and where date_to is earlier than now
10	Expired called	Contacts called without answer, with more tries left, but where date_to is earlier than now.
11	Not valid yet	Contacts (not called) where date_from has not yet arrived
12	Disabled	Contacts with more tries left but that have been Disabled.
13	Total remaining	Contacts that can be called now or later (=5+6+7+11)

Detailed report for all contacts /Detailed report Selected contacts

The Detailed report shows **one row per contact**. The selectable categories in the *Detailed report for selected contacts* are the same as the categories in the Summary report. The **columns** in the Detailed reports for all/selected contacts are:

Column	Explanation
Called number	The phone number the Dialler called to (<i>phone_num</i> from the list)
Total calls	Total number of calls done to the contact's phone number.
Status	The same statuses as used in the Summary report. (Ok, Silent call, No answer, Remaining not called etc.)
Status set time	The time the contact was given its current status in the list.
Redial time	The time the agent entered as <u>desired Reschedule time</u>
Redial comment	Comment from the agent that ordered reschedule
Redial reserved agent	If reschedule was ordered and the agent chose <i>To myself</i> , this agent's name will appear here. If reschedule to <i>Any agent</i> , no agent name is shown.
Redial set at	The time the agent <u>registered</u> the Enquiry registration that included a Reschedule time.
Feedback category	The Category the chosen topic belongs to
Feedback topic	The Topic the agent chose
Feedback agent	The agent that gave the feedback (last answered call)
Feedback comment	Comment from agent (that did not order reschedule).

The Detailed report shows the result for the latest call done to each Contact's number in the list (redial time/agent and the Feedback Category/Topic the agent selected).

You can show the report in the browser or generate a **csv** file that can be downloaded.

If you select **CSV download** for the Detailed report, you can choose between **Standard format**, **Import file format** and **Extended report**.

- The **Import file format** contains the columns phone_num, var1-varN and external_id, date_from, date_to, time_from, time_to if they have values (not the call result or agent feedback), so this format is useful if you want to generate a new list based on the contacts that did not answer.
- The **Extended report** contains all the columns from the Standard format (the results) and all the columns from the Import file format.

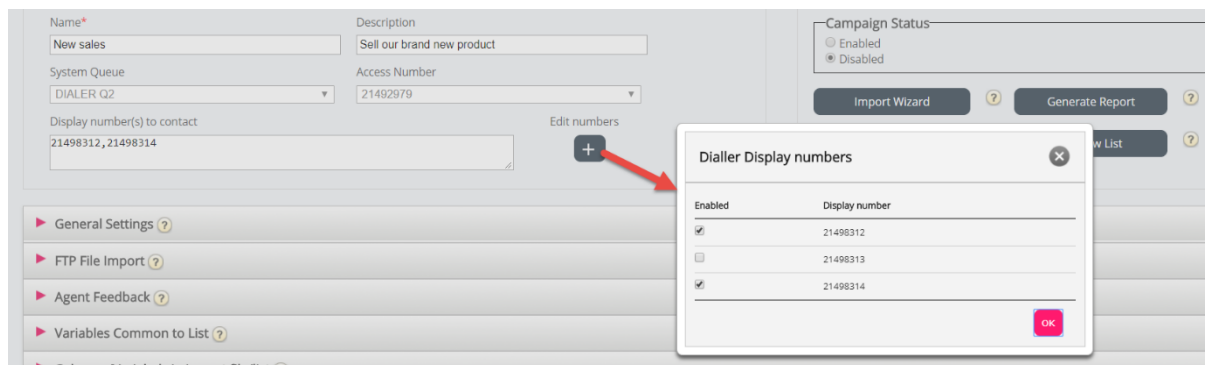
Please note that if you manually delete a single contact from a Dialler queue (not recommended), this contact will now be shown with one call too much in the Detailed report. The first time the campaign is disabled, the contacts in queue (if any) are removed, and the Total calls counter for the contact is corrected.

7.7.15 Display number for Dialler calls

If you don't want to present the Puzzel solution's access number as display number to the contacts the Dialler calls to, Puzzel support can configure that a specific number be used as Display number for each Dialler Campaign.

If you want to use several different Display numbers when calling contacts from one Dialler Campaign, Puzzel support can define a list of Display numbers that the Dialler randomly picks from. A specific Display number can be used for one or more Dialler Campaigns. If you want to change which of the pre-defined Display numbers to use, you can enable/disable numbers in the list.

Please contact Puzzel support if you want to add or delete Display numbers from the list for a Dialler Campaign.



Some of the contacts the Dialler calls to will not answer, and some of these contacts might choose to call back when they see a 'missed call' on their phone.

Puzzel can configure how calls back to the Dialler's display numbers should be treated, e.g. a special announcement/menu and route the call to a specific queue.

It is possible to use a variable in the list for display number to be used per contact, e.g. if you want to use one display number per "region" the contacts belong to. If you want this solution, please consult Puzzel, since Puzzel must change the Dialler service logic to use the correct variable (e.g. var9='PresentationCLI') as display number instead of "Display number(s) to contact".

7.7.16 How to start and stop a campaign / Campaign status

When all the campaign configuration is done:

1. Import a file with contacts to call
2. Preview the list to verify that numbers and values in other columns are ok.
3. If needed, filter or sort the list (affects what is put into queue and in what order)
4. Verify *General settings* (including Time intervals) and *Agent feedback* parameters
5. Start the Campaign by setting Campaign status to *Enabled* or *Automatic*.
6. Ask agents to log on with correct profile.

We recommend you disable the campaign each evening (if you didn't choose *Automatic*).

If you want to remove a contact from the active list, choose *Preview list*, search for the contact and check 'Disable'. The Dialler will not call a Disabled contact (again).

To see status/progress on the Campaign, you can click *Generate report* on the Dialler page and choose a Summary report. You can also see traffic so far today and this week per Dialler queue on page Real-time - Ticker Queues.

To stop a campaign, set Campaign status to *Disabled* and click *Save*. The contacts (requests) already in queue will automatically be removed from queue within 1 minute.

The Dialler traffic is included in the **Statistics** reports Total overview, Details per queue (separate queue(s) for Dialler), Details per agent per queue and Dialler queue report.

7.7.17 Options for silent calls, incoming calls and unanswered calls

Options that require special configuration by Puzzel:

1. **Silent call announcement to contact:** If you want to play an announcement to contacts that answer and are not connected to agent within x sec (on a Predictive/Power mode campaign), this must be configured by Puzzel. The used sound file will be shown and

can be changed in the Sound file library. The Dialler call is disconnected after this announcement is played.

2. **Prevent new outbound Dialler call(s) to a number Puzzel recently received an incoming call from.** It is possible to configure that incoming calls are checked against a Dialler campaign's list, and if the number is in the list, this number can be automatically marked as "Completed OK" in the list, so that the Dialler doesn't call this number again (from this list).
3. **Send SMS to numbers that didn't answer Predictive Dialler calls.** If you want this, we recommend sending SMS only after 1st unanswered call. The SMS text can be shown on the Dialler page under *Variables Common to list*, and it is possible to configure that the sent SMS text is included in Archive and in Raw data as a call variable.

Please contact Puzzel if you're interested in one of these options.

7.7.18 Prevent call forwarding to voicemail

When the Dialler calls a contact's number, Puzzel includes "please don't forward" (aka "diversion inhibitor") in the call set-up (sip invite) message to the contact's telecom operator. If a person has activated *Call forwarding to voicemail* when busy or after x sec ringing, **MAYBE the mobile operator will disconnect the call instead of forwarding to voicemail that answers.** If it works varies between countries, mobile operators, mobile subscriptions and type of call forwarding/voicemail solution.

Example (when it works):

The Dialler's Max ringing time is 29 sec and the contact's mobile phone has configured Call forwarding to voicemail after 25 sec and when busy.

- If the contact does not answer the call from the Dialler within 25 sec ringing, the call will end instead of being forwarded and answered by voicemail.
- If the contact's phone is engaged in a conversation when the Dialler calls the number, the call will end instead of being forwarded and answered by voicemail.
- If the contact clicks No/Reject while the Dialler call is ringing on the mobile, the call will end instead of being forwarded to and answered by voicemail.

Puzzel does not try to detect if an answered call is answered by a live person or an answering machine before connecting the answered call to an agent. The main reason is that such Answering Machine Detection (AMD) solutions causes delay in connecting an

agent and usually more silent calls. (The AMD solution may generate silent calls by mistaking a call recipient for an answer machine and disconnecting the call).

For progressive/power/predictive mode, when an answer signal is received from the called contact's number, Puzzel connects a ready agent. For preview mode, the agent is already on the line, so when an answer signal is received, the agent and contact is joined.

When an agent is connected to a contact's answering machine, we recommend the agent hangs up and clicks "Mark as unanswered".

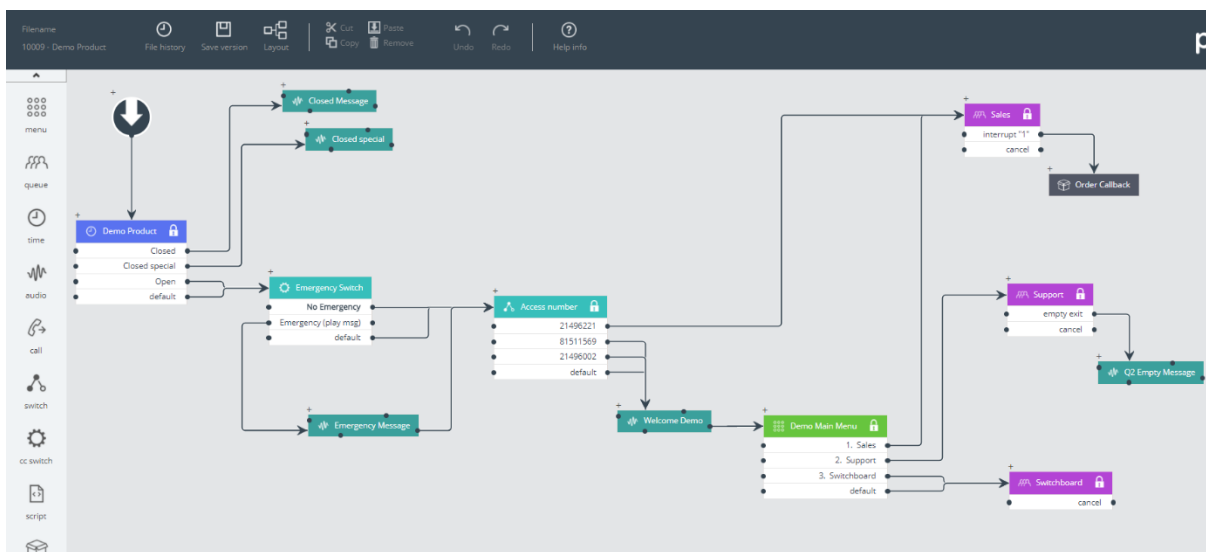
7.8 Call Flow Tool

The main supported browser for Call Flow Tool is **Chrome**.

Most Puzzel solutions are designed using the Call Flow Tool. A Puzzel customer usually has one Call flow service configuration, but some have 2 or more.

Name	Document ID	Last modified	Edited by	Actions
Main service	1918	2015-04-09	10010	
test	2297	2018-04-23	10010	

If you have more than one Call Flow configuration and not all admins with access to this page should see all, you can define and use resource filter(s). If you click on a Call Flow service configuration, the Call Flow Tool opens in a new browser window.



The different available module types are listed in the left margin. Modules can be dragged (one at a time) into the canvas. Double-click on a module to open the details window for the module, where you can see and enter details for the module.

To connect two modules, click on the 'From' module's exit point (a black bullet) and drag a line to the 'To' module's enter point (top/left/right).

Access levels in Call Flow Tool

- *Read only*
- *Write/save access*
- *Install*
- *Scripting*

To get write or install access, you first need to participate in a training session and pass the certification test. Customers do not usually get access to the script module since these modules contain code.

Version handling

- The *File history* menu lets you choose between *Load active version*, *Load the latest version* and *View all versions*.
- The *Save version* menu lets you choose between *Save and activate*, *Save draft*, *Save as* and *Activate*.

How to roll back to an earlier version:

Click *File history* and select *View all versions*. In the version list, select a version and click *Load* to see it. Then click *Activate*.

Modules

Module name	Description
Start	The starting point. Puzzel usually defines an Initial script and/or a Finally script (under Advanced)
Time	In a <i>Time</i> module, you define exits like Open, Closed, Closed-special etc, and calls will be routed to the correct exit based on the defined opening hours under <i>Services – Time</i> . Please see Local Time module vs Shared/Bound Time module
Audio	The <i>Audio</i> module plays the selected audio file for the caller. The actual audio files (you can choose from) are maintained under <i>Services - Audio</i>
Menu	The <i>Menu</i> module presents the caller with a number of choices and routes the caller to an exit corresponding to the entered DTMF.

Module name	Description
Caller input	This module is a kind of a menu module for getting input from the caller. The input (e.g. customer number, reference number, postal code etc) is stored in a variable (defined here) to be used later in the service.
Queue	In the <i>Queue</i> module, you must define the messages/sounds that should be played for the callers waiting in this queue, and you can define different optional queue exits like Full, Empty and Timeout. The <i>Queue</i> module calls to an agent (on behalf of the caller), and when the agent answers, the caller and the agent is joined.
Content	Contains a new (child) call flow within (the parent) the call flow.
Callback	This is similar to the Content. This module opens a new call flow where you can define the flow for the ordering of callback.
Variable	With this module, you can define a variable and give it a value, and the variable can be used other places later in the service.
Script	In this module Puzzel support or expert users can write xml-code for routing functionality that is not (yet) supported in other modules.
Switch	This module routes the call to an exit based on the current value of a variable defined by the user or a system variable, e.g. 'The number of this service' (=access number).
CC switch	This module relates to the service variables defined in the Admin Portal on page Services - Service variables. An incoming call chooses the exit that corresponds to the current value for the variable.
External lookup	Here you can define the basics (URI, username and password), the request (parameters) and the response (response schema) for an external lookup that Puzzel can do on behalf of the caller.
Loop	This module is used to repeat a sequence of modules for as many times you specify, or until a certain condition has been met. This is very useful for queue messages, which needs to be repeated until the caller can be connected to a free agent.
If	A module that will determine if an expression is true or false, and route the call through the corresponding exits. The basic expression is the comparison of two values, either fixed or variables, using <, = or >. Experiences users, familiar with the scripting syntax, may create more complex expression in the "custom expression" field.
notes	A yellow note with descriptive text you can put different places in the call flow to explain things
call	The call module calls the defined number and, if answered, connects the caller to the called number.
inline	This module is used to execute a different module in the Call Flow configuration, which reduces unnecessary duplication of modules, to reduce the size of the configuration and to make maintenance easier.

Local Time module vs Shared and Bound Time module

A Time module is by default “local”, but you can convert it to be “Shared”, so that several Time modules shown in Call Flow Tool can share the same opening hours and exits. If this is done, the Shared time module is shown in Admin Portal, but not “bound” ones.

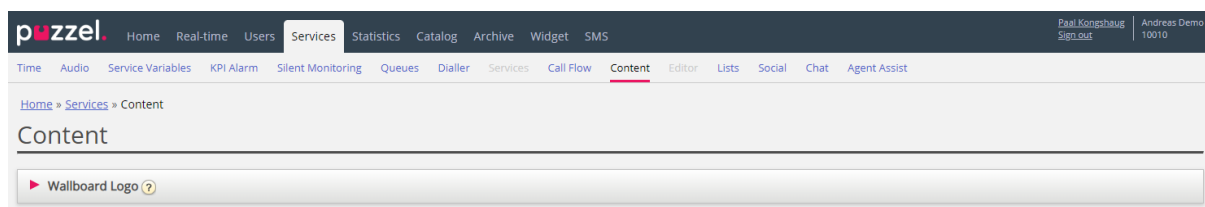
Ref. [Local Time module vs Shared/Bound Time module NEW!](#)

Responsibility for errors and support

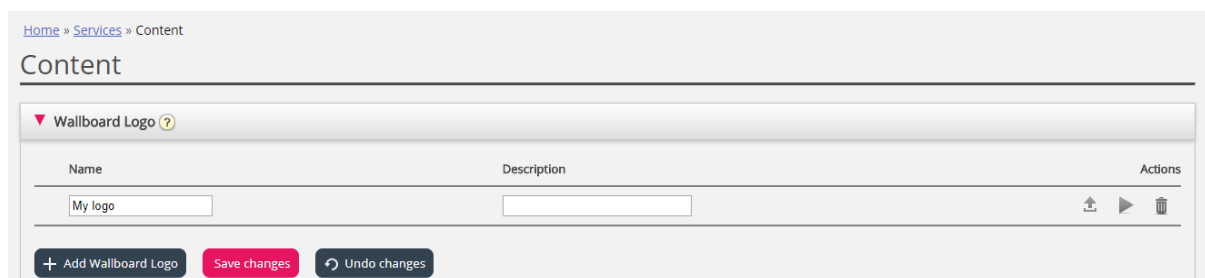
If you activate a version that does not work (at all or not as intended), and you need Puzzel support to help you, please note that we might charge you for the time spent if the error is due to “poor” configuration from your side.

7.9 Content

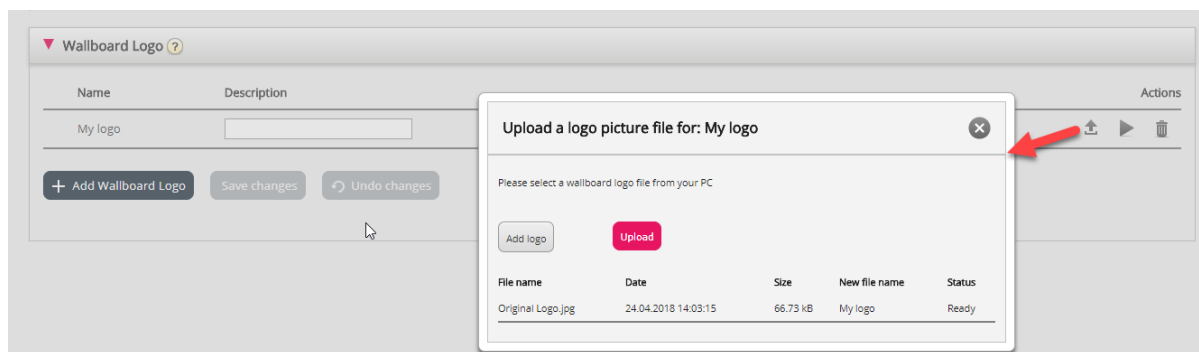
On this page, you can upload your own Wallboard logo file(s).



Click *Add Wallboard logo*, define a name for the new row (this will appear in the listbox under Wallboard Display settings) and optionally a Description and click *Save changes*.



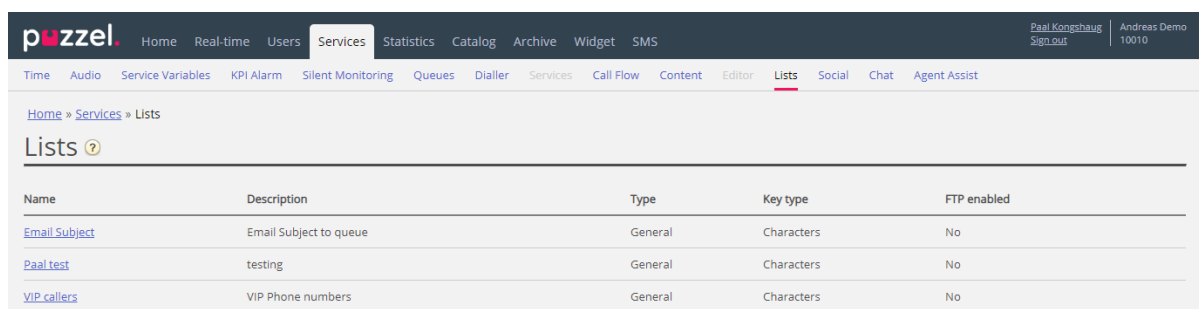
Then click the upload action button to open the Upload window. Click *Add logo*, select the correct file (png, jpg, bmp) from your computer, and when you see the file name in the window, click *Upload*. The status will change from Ready to Finish after a short while, and then you can close the window.



To see an uploaded logo file, click on the play button. To upload a new (replacement) file for a defined logo name, click on the upload button and choose a new file.

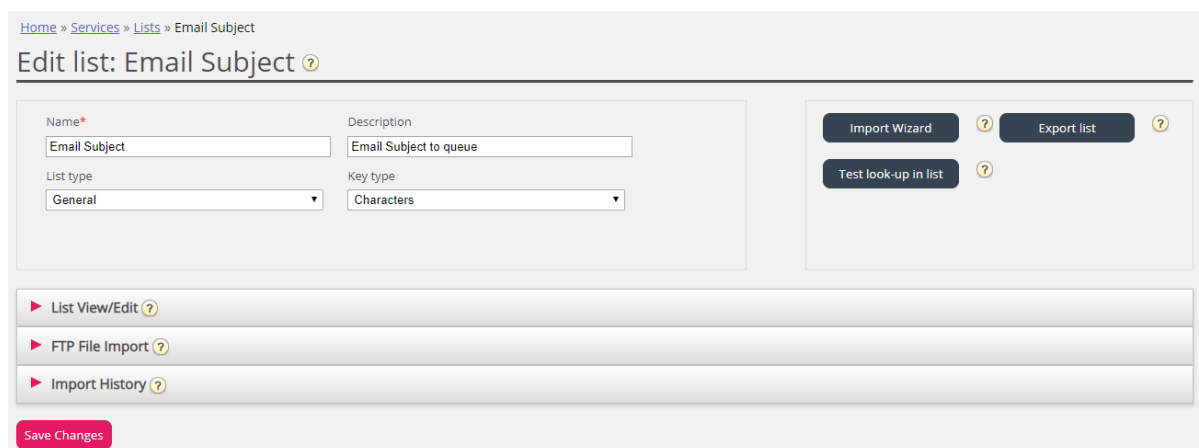
7.10 Lists

On this page you can see the lists in your Puzzel solution. Please note that you might not see all your lists since Puzzel can define a list as “visible for Puzzel only”.



If you see a list on this page that you do not understand or did not know was used in your Puzzel solution, do NOT make changes in the list, but instead, contact support to ask what it is used for and possibly make it visible for Puzzel only.

When you click on a list, the *Edit list* page is opened:



7.10.1 List basics

You may have one or several lists used in your Puzzel solution.

- Basic lists (*General list, Allow list, Deny list, Node list or User list*)
- *Combined* lists (which consist of one or more basic lists which are evaluated one by one in a predefined order).

A list contains a *Key* and a *Value* column.

All list look-ups share a few common details:

1. They take a single value in (incoming Key)
2. They match this single value with the keys specified for each row in the list.
3. They return a single true/false stating if a match was made (return value)
4. They return a single output value if a successful match was made, always a string of variable length. Please observe that this single output value, if wanted, can be a more complex “structure”, for example an Xml-structure. The size of the output value is currently limited to 7000 bytes.

How to update a list's content

- Edit the list content in the Admin Portal
- Use the *Import Wizard* to upload a new file replacing the current list content
- Add a new file with list content to Puzzel's FTP server to replace the list content
- Let Puzzel support maintain the list for you

Only Puzzel can add new lists and delete existing lists.

Please note that the **List name** is used as the reference, so if you change a List's name, you need to change it in the place(s) in the service logic that uses this list.

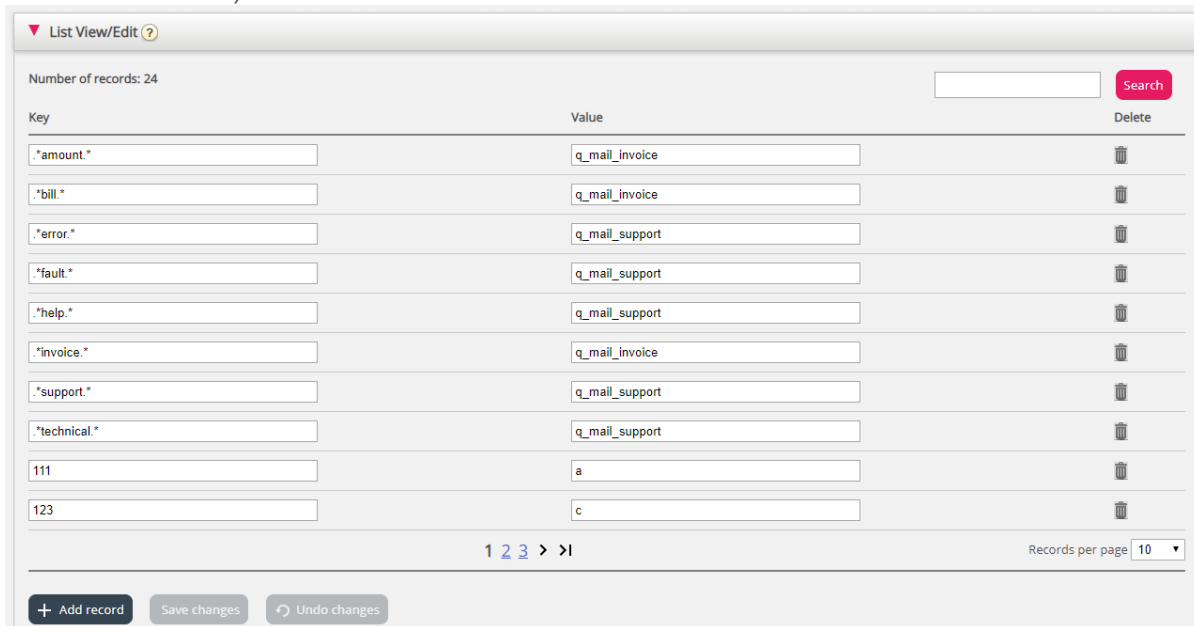
The Key type is **Integer** (digits only) or **Characters**.

Search vs Test look-up in list for a particular Key:

- You can enter text in the search input box to search for and see records containing the entered text in the Key or in the Value column.
- If you want to test if the list works as expected, click *Test look-up in list* to open a new input window. Here you enter a Key and click Search. If a match is found in the Key column, this record's Value is returned.

7.10.2 Edit a list in Puzzel

Click on *List View/Edit* to see the records in the list and search for records.

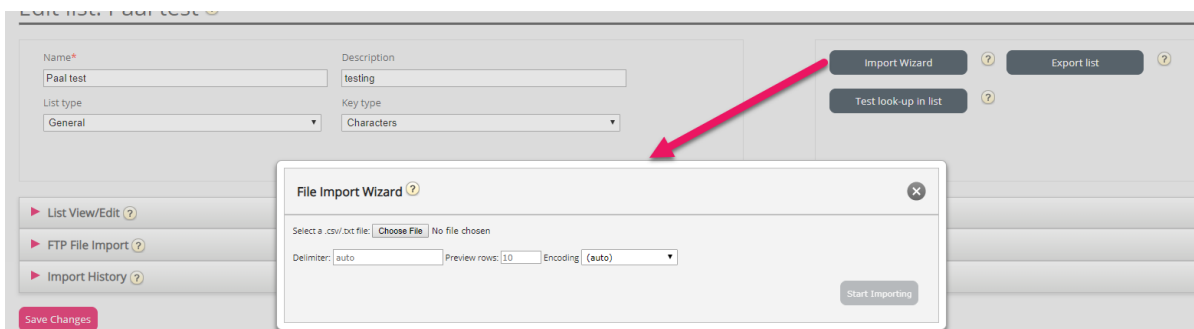


Here you can add new records, delete existing records, and change content in existing records. You must click **Save changes** to store the changes done.

By default, we show 10 rows per page, but you can increase this value.

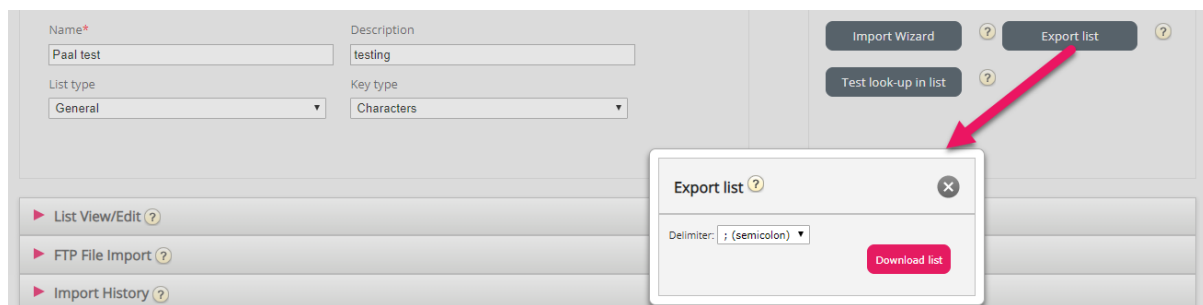
7.10.3 Import Wizard

If you want, you can upload a file with list content into the Admin Portal. If you do, this file's content replaces the current content in the list. If you want to do this, click **Import Wizard**, select the file on your disk, and choose *Start importing*.



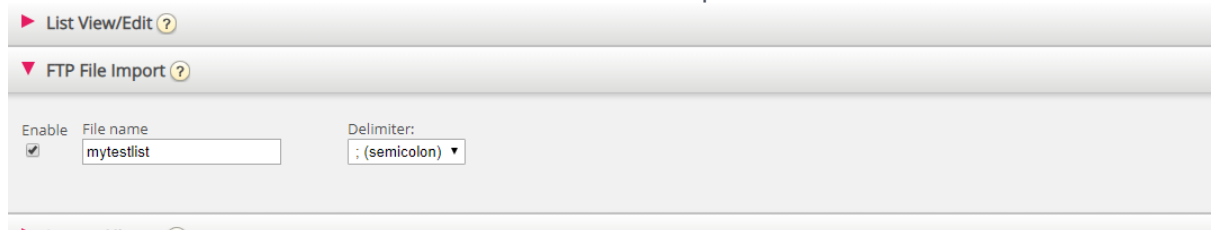
7.10.4 Export list

If you want to export the list content to a csv file, click *Export list*, and then *Download list*.



7.10.5 FTP File import

If you want to generate a new list to a file e.g. each night or week and put it on Puzzel's FTP server, so that Puzzel can import it, we can configure that this is done. You need an FTP user account for Puzzel's FTP server, and FTP File import must be enabled, and the correct filename must be entered under FTP File Import.



7.10.6 Matching, wildcards and ranges

In a list-lookup, we will test if there exist any records in the list where the **incoming Key** (e.g. caller's phone number, entered DTMF or Subject in an email) matches the Key in a row in the list. If match is found, the (first) matching record's Value is returned.

The **incoming Key** can only be a single (constant) element. Wildcards or ranges are not allowed here.

The **Key** field of a record in a list may be a **single element** (constant), a **range**, or a single element containing one or more **wildcards**. Combination of range and wildcard(s) within a list row's Key is not allowed.

Ranges in the list's Key field

- The from-value and the to-value is separated by **:** (colon)
- The to-value is included in the range. Example Key range: 21000000 : 21999999

Wildcards in the Key field:

The wildcard matching, as well as the substitution (next chapter), is based on syntax known from Perl-based regular expressions. Though, there exists a set of restrictions compared to the full "Perl-syntax". This is what's supported as part of a Key:

- Represent any number of characters: `.*` (i.e. single dot followed by an asterisk)
- Represent any single character: `.` (i.e. a single dot)

Examples:

Description	Key
Match for any number starting with 47	<code>47.*</code>
Match for numbers starting with 47, and which are 10 digits totally (i.e. 8 digits after 47)	<code>47.....</code>
Match any number starting with 47 and ending with 99. Between the starting 47 and the ending 99, it should be at least two characters	<code>47...*99</code>
Match for text ending with abc	<code>.*abc</code>
Match for text beginning with abc	<code>abc.*</code>
Match for text containing abc	<code>.*abc.*</code>

Advanced:

Quoting needed for the wild-card characters:

If a single dot is going to be a part of the key, and not treated as a wildcard, you need to prefix the dot with a backslash. The same is true for an asterisk if the asterisk follows a single dot. Though, asterisk alone (i.e. not right after a dot) is understood to be a part of the key without backslash. Examples, quoting:

Description	Key
Make a Key that should match an incoming Key with the fixed value <code>47*1</code>	<code>47*1</code>
Make a Key that should match an incoming Key starting with 47, then it should have one character of any kind, and in position 5 and 6 should be <code>*9</code> (Sample of such an incoming Key is <code>473*9</code>)	<code>47.*9</code>
Make a Key that should match an incoming Key with the fixed value <code>47.1</code>	<code>47\.1</code>

Substitution:

A return value (from match in the look-up) can be manipulated so it contains parts of (or whole) incoming Key. This is how:

- A wildcard-expression might be surrounded by parentheses, and thereby making a wildcard-group.

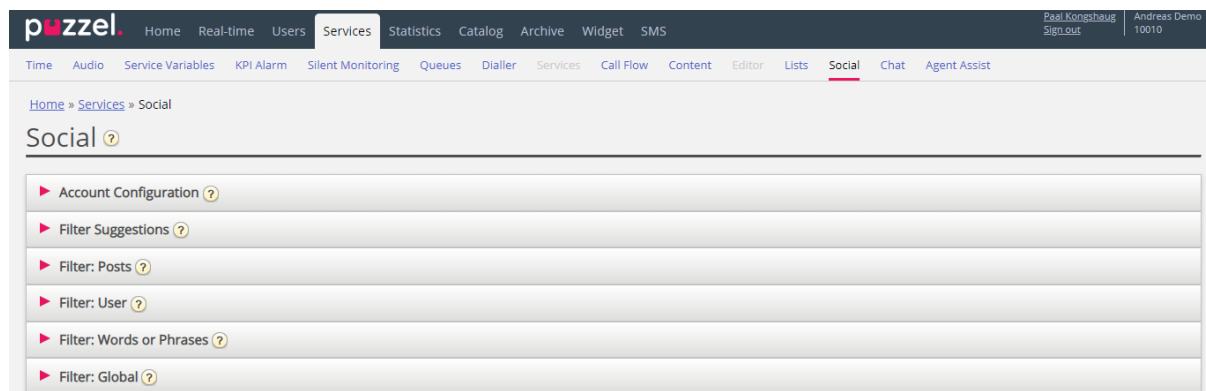
- There might be more than one wildcard-group within the same Key. The characters in an incoming Key that matches a particular wildcard-group could be part of the returned Value.
- Placeholders (in the specified return Value) for these wildcard-groups are \$1 for the first group, \$2 for the second, \$3 for the third, and so on.

Examples:

Description	Set Key to	Set Value to
Any incoming Key starting with 22, and which are of exactly 8 digits, should be prefixed with the value 0047	22(.....)	004722\$1
Incoming Key starting with 0047, and containing an unknown number of character thereafter, should have 0047 stripped off	0047(.*)	\$1

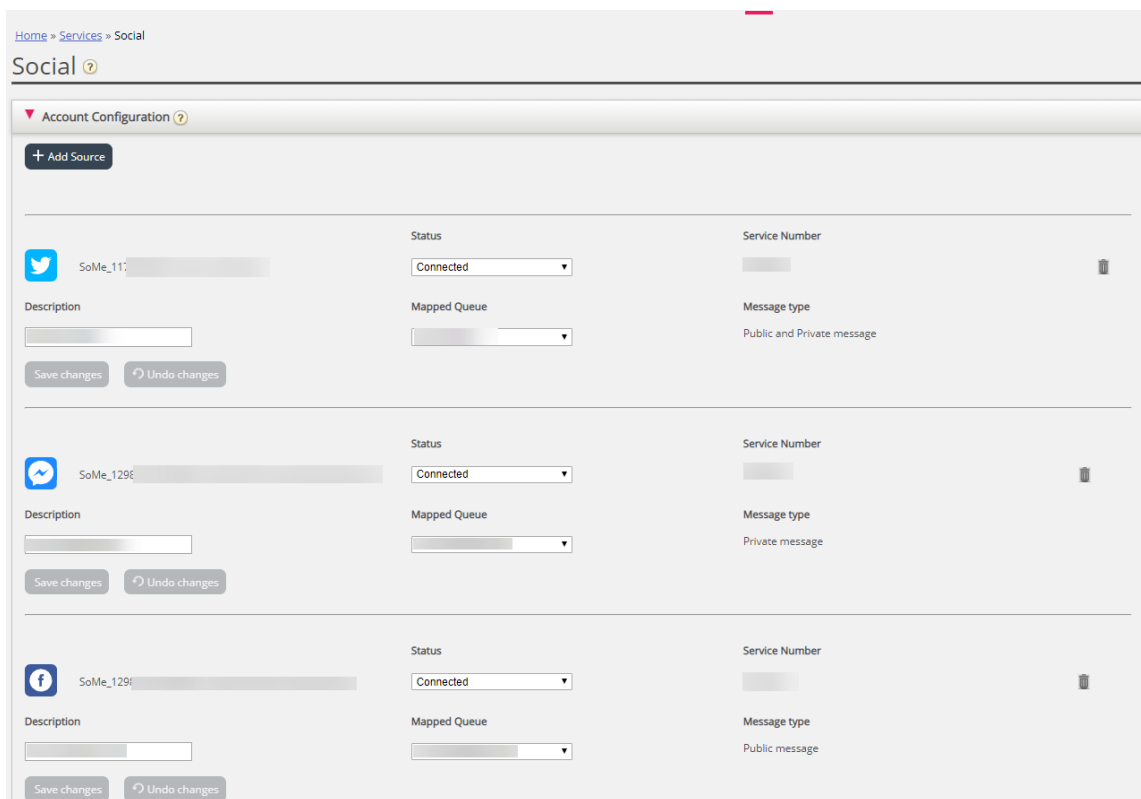
7.11 Social media

On page *Services – Social* you can add, edit and delete the Social media channels/access points that should be routed into your Puzzel solution (*Account configuration*), and you can handle *Filter* suggestions from agents.



7.11.1 Account configuration

Here you can configure the different social media accounts/access points (e.g. Facebook (public) posts, Facebook messenger (private messages) and Twitter) that should be linked to your Puzzel solution. Please note that these configurations are for the new Social media solution which can only be used with agent.puzzel.com.



7.11.2 Filtering

Filtering is mechanism to limit or filter notifications for specific social media channels, threads, users or phrases.

- An agent creates a filter suggestion from agent.puzzel.com
- The suggestion then goes into the Admin Portal's Filter Suggestion inbox.
- An administrator can approve or reject this suggestion.
 - If a suggestion is deleted/rejected, no further action is taken
 - If a suggestion is approved, the filter is applied, blocking all further notifications for this type.

The active filter(s) are separated into four different sections: Posts, Users, Words/phrases and Global.

7.12 Chat configuration

From this page you can create one or more chat configurations that can be used by your web-page(s) that offer Puzzel site chat. When you create a chat config, this config gets a GUID (Globally Unique Identifier). This GUID must be entered on the web-page that should use this chat config.

Example: configurationId: '8557fba7-8587-45b0-95e1-23b36b76bcad'

Instead of putting lots of chat parameters with values on the web-page (that maybe only a web developer can change), you can now configure the parameters in the Admin Portal, and easily change them yourself without doing changes on the web-page.

If you create a Chat config and include its GUID in the chat code on your web page, you should remove the parameters from the web-page that are now set in the config in the Admin Portal.

The screenshot displays the 'Chat Service Configurations' page in the Admin Portal. At the top, there's a navigation bar with 'Services' selected. Below it, a breadcrumb trail shows 'Home > Services > Chat'. The main content area features a table with the following data:

Name	GUID	Parent Configuration	Last modified	Edited by	Delete
Main site config	f3c54c75-e8ce-4bc7-8f85-63feec91927e		2019-08-27	paal (Customer Key 10010)	[Delete]
Andreas Web Chat	2b1aab28-e095-4a1e-b199-0d3b0a83a00f	Main site config	2019-09-11	Andreas (Customer Key IQADMIN)	[Delete]

Below the table, the configuration details for 'Main site config' are shown. It includes a 'General Information' sidebar, 'Availability' settings, and a 'PARAMETER' table. The 'PARAMETER' table has columns for 'PARAMETER', 'INHERITED', and 'VALUE'. Two parameters are listed:

PARAMETER	INHERITED	VALUE
Variables [variables] (?)	<input checked="" type="checkbox"/>	
Queue Key [queueKey] (?)	<input checked="" type="checkbox"/>	

At the bottom, there's a section for 'Availability based on custom conditions [usualQueueExpression] (?)' with a code editor containing the following code:

```
1 function (a) { return (a && q.AgentsLoggedIn > 0); }
```

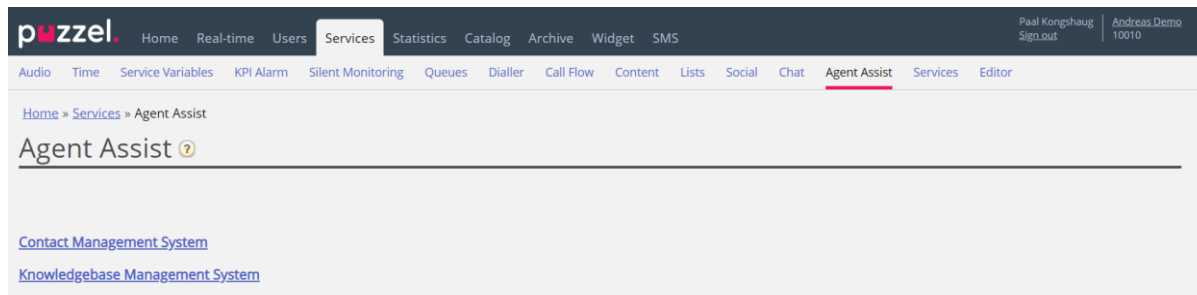
- If a parameter is defined both on a web page and in the admin configuration, the parameter on the web page is used.
- If a parameter is neither defined on a web page nor the admin configuration, the parameters default value is used.
- If a parameter is defined in both a parent and child admin configuration, the parameter in the child configuration is used.

The complete chat config can be found here:

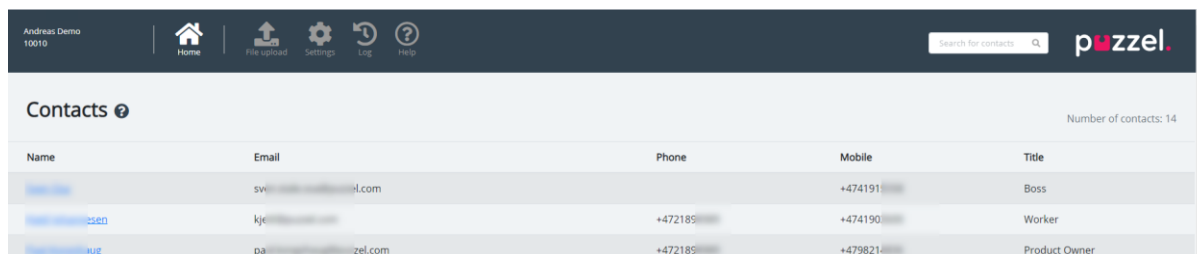
<https://help.puzzel.com/hc/en-us/articles/207670569-Web-Chat-Complete-Setup-Guide-for-Web-Developers-docx-document->

7.13 Agent Assist - Contact Management system

If you have access to page Services – Agent Assist you will see the link to the *Contact Management system* and possibly the link to the *Knowledgebase Management system*.



The Agent Assist Contact Management system



In the Contact management system you can:

- Upload a file to add/replace the (customer) contacts in Agent Assist*
- Configure settings for FTP import of contacts
- See contacts/search for contacts
- See the contact file Import log

* If configured, these contacts are also available and searchable in the Agent application as search source **Customers** when the agent wants to make an outbound call or when choosing Forward to consult or transfer the call.

Agent Assist in the Puzzel Agent application needs a contact list so that the **correct contact** can be found and shown to the agent when the agent receives a call/chat/email.

To be able to find calls and emails/chats in the **Archive** and show it in Agent Assist **interaction history**, the calls must be from the number(s) registered on the contact, and the emails/chats must be “from” the email address(es) registered on the contact.

The storage time for General information in the Archive determines how old calls/chats/emails that will appear in the Agent Assist Interaction history.

The Agent Assist Interaction history shows some of the information related to calls/chats/email from the Archive, but not all details.

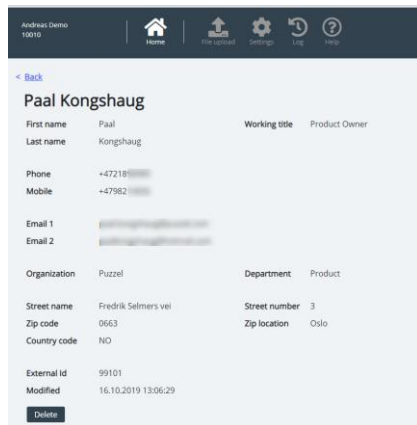
The contact file(s) can be uploaded in the Agent Assist Contact management system, or you can schedule a 'contact file export task' from your CRM system so that Puzzel can fetch a contact file from Puzzel's FTP server e.g. each night/week.

7.13.1 See contacts and search for contacts

On the Start/Home page you can see all the contacts in the list (20 contacts per page), and you can search for contacts.

When you search, contacts that **contain** you search string in First name, Last name, Working title, Organization, Department, phone numbers and email addresses are returned.

You can click on a contact's name to see this contact's details:



7.13.2 Contact File format

The file can be a Microsoft **Excel** file with extension **xlsx** or **xls**, and if you use FTP import CSV is also supported. You can use a file without header row or with a header row with any column names, and then map the columns in the file to the correct fields in the Contact list.

We recommend using these header row names to simplify the column mapping:

External id, First name, Last name, Phone, Mobile, Email 1, Email 2, Working title, Organization, Department, Street name, Street number, Zip code, Zip location, Country

Requirements:

1. **External id** is required. This is the contact's unique id e.g. from your (main) CRM system. (If a file contains 2 rows with the same external id, the last record will replace the first imported record).
2. **Last name** is required

3. A contact must have at least **one phone number (Phone or Mobile) or at least one email address.**
4. **Phone numbers** must be on correct format (see below).

A contact that does not meet requirements 2, 3 and 4 is not imported!

Phone and Mobile numbers

If a contact has one Mobile number and/or one Fixed number, put the number(s) in the correct column. If a contact has 2 mobile numbers or 2 fixed number, we recommend putting one in Phone and one in Mobile.

Phone numbers are stored on **E.164 format** in the Contact list in Puzzel, and should therefore be written on this format in the file: “**+<country code><subscriber number>**”.
Examples: +4712345678 or +447712345678.

However, Puzzel will convert phone numbers to the correct format when importing a file:

- For numbers starting with ‘00’ we will **replace ‘00’ with ‘+’**
- For numbers NOT starting with 00 or + we will **add ‘+’ and the correct country code** according to the defined default country.
- **All spaces will be removed**
- In numbers containing ‘(0)’ we will **remove ‘(0)’**

Email addresses

An email address must be on format ‘*@*.*’ to be imported.

A contact with an email address not complying to this will be imported, but the email address will be blank.

Two update alternatives

1. Full replace

- The existing contact list is deleted and all new contacts from the new file are imported. Notes on contacts (if any) in Puzzel will disappear.

2. Replace and append

- A contact in the file with an external id already in the list will be updated. All existing info for this id is deleted and all info for this id in the file is added.
- A contact in the file with a new external id or without external id will be added
- A contact in the list in Puzzel that is not in the file will not be changed.

One file can contain **max 10.000 rows**, so if you want to upload more contacts than this, you must split your contacts into 2 or more files and upload them one at a time. There is no specific max number of rows in the contact table in the Puzzel Contact database table.

Please note that if a file contains 2 rows with the same external id, the last record will replace the first imported record.

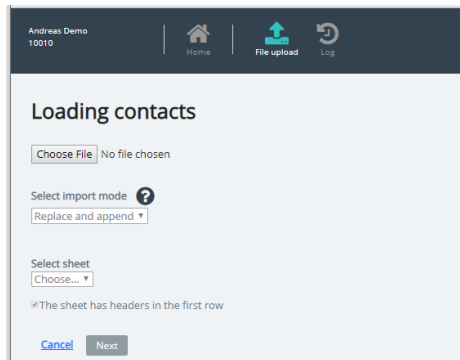
Column name	Comment/Format	Example
External id	Key field, required. The contact's unique id in the (main) CRM system.	007
First name		James
Last name	Required	Bond
Phone ¹	+<country code><subscriber number>	+44123456789
<i>Phone description</i> ²		
Mobile ¹	+<country code><subscriber number>	+44987654321
<i>Mobile description</i> ²		
Email 1 ¹	*@*.*	James.bond@mi5.com
<i>Email 1 description</i> ²		
Email 2 ¹	*@*.*	
<i>Email 2 description</i> ²		
Working title		Secret agent
Organization		Mi5
Department		Foreign affairs
Street name		Oxford street
Street number		33
Zip code		12345
Zip location		London
Country		England

¹ A contact must have a phone number or an email address. If not, it will not be imported.

² Descriptions are not needed, but they might be e.g. Work, Home, Switchboard

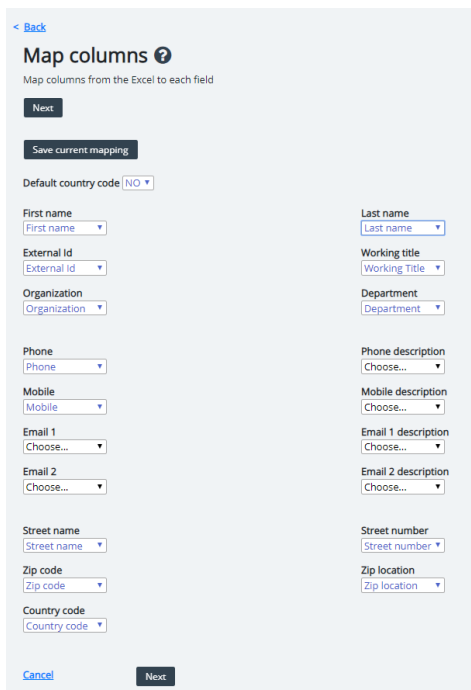
7.13.3 File upload

If you want to upload a file with (customer) contacts, click **File upload** and follow the instructions.



- First, click **Choose file** and select the correct Excel file on your computer.
- Then choose *Replace and append* or *Full replace*.
- Then select the correct *Sheet* in your file.
- If your file contains a header row, make sure to check “*The sheet has headers in the first row*”
- Then click *Next*.

On the **Map columns** page, you must map the columns in the file to the correct columns in the Contact table in Puzzel.



If you have used the proposed column header names, (most of) the mapping will be done automatically.

If this file's format is the format you will use the next time (every time) you upload a contact file, it is very useful to click *Save current mapping*.

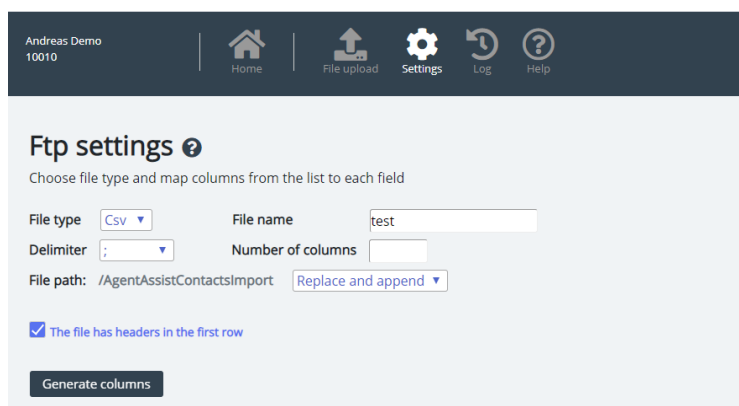
When you're done with the mapping, click *Next* to go to the *Preview* (file upload) page.

If the mapping looks correct, then click **Start import**. If not, click *Back* to adjust the mapping or *Cancel*.

When the import is done, you can see a new entry in the *Import log*.

7.13.4 FTP import

If Settings for FTP is configured correctly, Puzzel will look for a new file on Puzzel's FTP server periodically (every 15 mins), and if a file is found, then it's imported and moved to a sub-folder `"/AgentAssistContactsImport/Archive"`



The screenshot shows the 'Ftp settings' configuration page. At the top, there is a navigation bar with the user name 'Andreas Demo 10010' and icons for Home, File upload, Settings, Log, and Help. The main content area is titled 'Ftp settings' with a help icon. Below the title, there is a subtitle: 'Choose file type and map columns from the list to each field'. The form contains several fields: 'File type' is a dropdown menu set to 'Csv'; 'File name' is a text input field containing 'test'; 'Delimiter' is a dropdown menu set to ';'; 'Number of columns' is a text input field; 'File path' is a text input field containing '/AgentAssistContactsImport'; and 'Replace and append' is a dropdown menu. There is a checked checkbox labeled 'The file has headers in the first row'. At the bottom of the form, there is a 'Generate columns' button.

Configuration

- **File type:** Choose the file extension from the drop-down list of (csv, xlsx, xls).
- **File name:** Enter the filename of the contacts file to be imported (without file extension)
- **Delimiter** must be selected for file type csv
 - ; (semi colon)
 - , (comma)
 - . (period)
 - Tabbed (tab)
- **Sheet** must be selected for file type xls or xlsx
- **Number of columns:** choose the number of columns you have in your contacts file
- **File Path:** Files must be uploaded to `/AgentAssistContactsImport`
- **Import Mode:** Select from the drop-down "Full replace" or "Replace and append"
- **Header row:** Check the box if the contact list file contains a header row

Mapping

To map the columns of the contacts list file to the database fields, click the button 'Generate columns' so that the mapping fields appear.

- For file type csv, the columns are numbered (Column 0, Column 1...)
- For file type xls/xlsx the columns are labelled with letters (column A, Column B...)

Once the mapping is completed, you can save the settings so that any subsequent import uses the stored settings for automatic processing.

7.13.5 FTP export

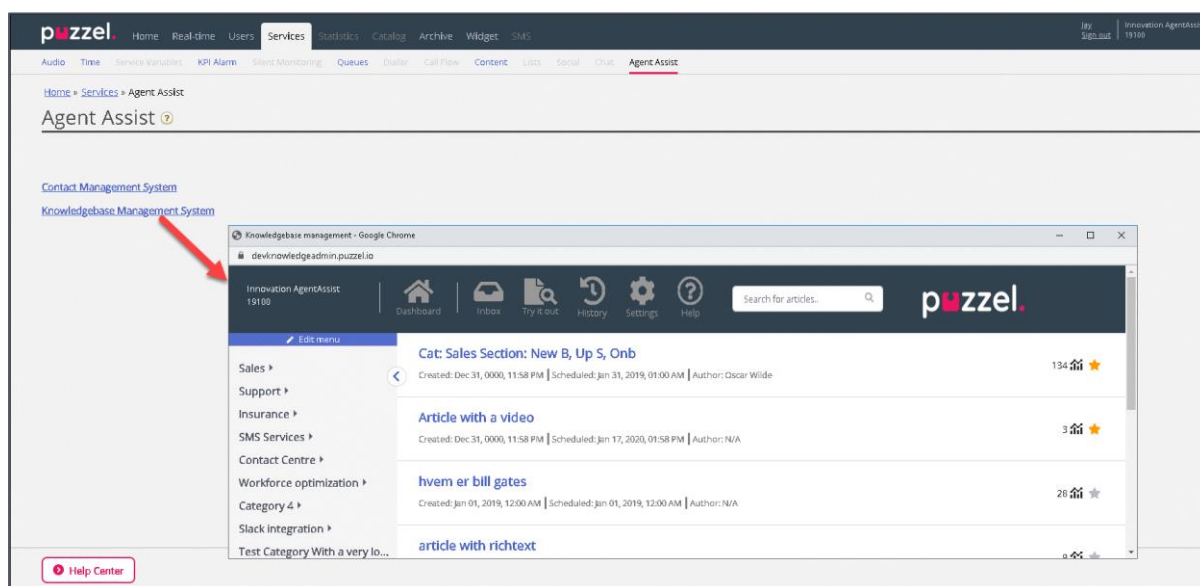
You can now export the contacts in the Contact Management System to a CSV file by clicking on the **Initiate new export** button. In a few moments you will be presented with a file that is available for you for a set period of 48 hrs. You will have to click on the file to download it to your local machine.

The screenshot shows the 'Ftp settings' section of the Admin portal. It includes a navigation bar with 'Home', 'File upload', 'Settings', 'Log', and 'Help'. The 'Ftp settings' section has a title and a subtitle 'Choose file type and map columns from the list to each field'. It contains several input fields: 'File type' (set to 'Csv'), 'File name' (empty), 'Delimiter' (set to ';'), 'Number of columns' (empty), 'File path' (set to '/AgentAssistContactsImport'), and 'Full replace' (checked). There is a checkbox 'The file has headers in the first row' which is checked. Below these fields is a 'Generate columns' button. The 'Export contacts' section has an 'Initiate new export' button with a red eye icon. At the bottom, there is a table titled 'Available files for download:' with columns 'Created', 'File name', and 'Hours available'.

Created	File name	Hours available
02.07.2020 11:25:12	efb7a2ee-bab2-4514-a787-f3887c99003d.csv	48

7.14 Agent Assist - Knowledgebase Management System

You can access the Knowledgebase Management system from the Admin portal under *Services - Agent Assist* menu option. Please be aware that this is a paid service and needs to be configured for your solution before use.



The knowledgebase management system is a data storage hub, that contains articles about topics that are deemed relevant and useful for the agents while answering to the customer queries.

In the Knowledgebase Management system, you can:

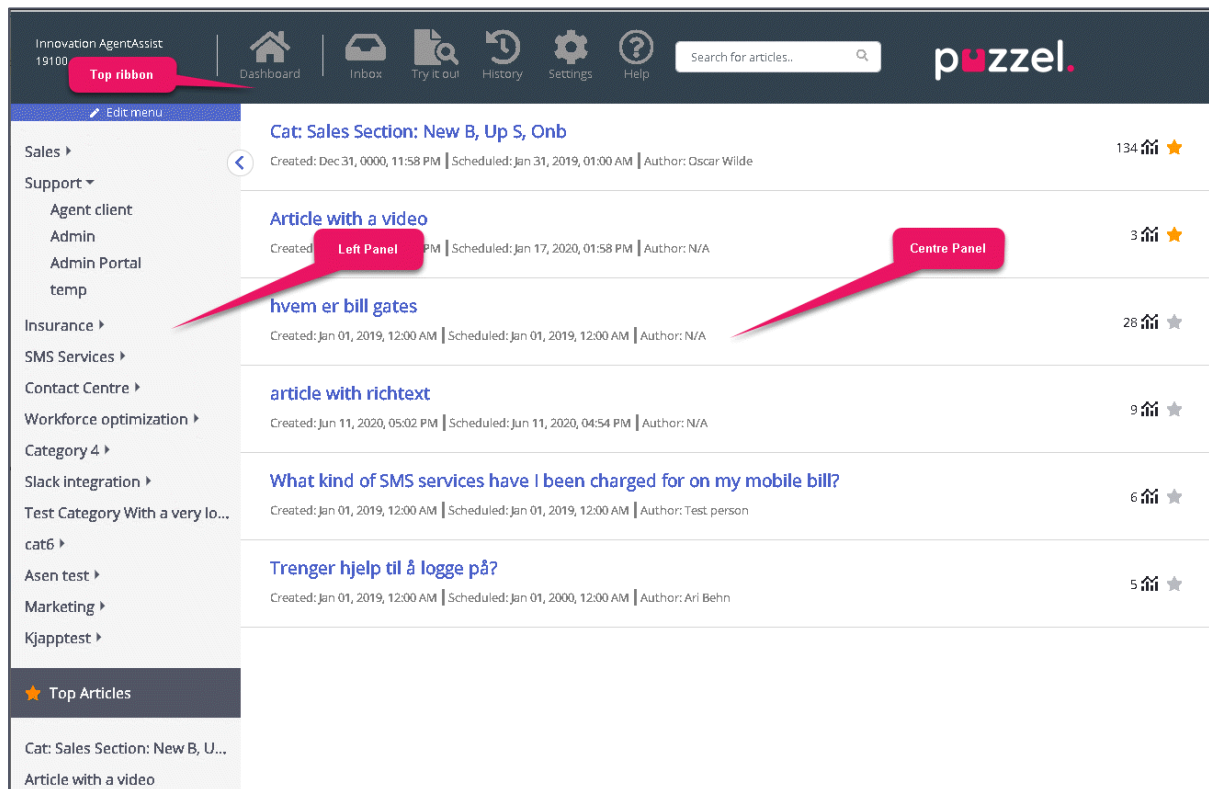
- Create/edit the articles
- Delete the articles
- Categorize the articles
- Publish/unpublish the articles
- Rate the articles

Admins need to create relevant articles, group and tag them appropriately, so that it can be effectively analyzed [automatically served or manually searched] and used by the agents while on conversation with the customer or flipped through them using our Knowledgebase widget.

7.14.1 Dashboard

The Knowledgebase management dashboard consists of three parts, details of which are explained in the table below:

Screen blocks	Description
Top ribbon	Lists various menu options and a search bar
Left panel	This essentially contains the article categories and sections and also features top rated articles
Center panel	This space is used for listing various options selected on the screen, and for editing a selected article.



The top ribbon consists of 3 menu options and a search panel. The menu options are:

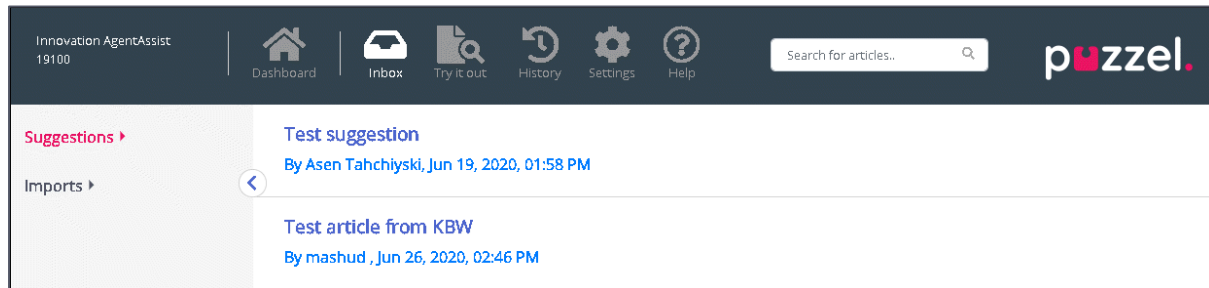
1. **Dashboard:** Screen that is displayed as soon as you have logged in
2. **Inbox:** Contains Knowledgebase article suggestions from agents for Admin's approval.
3. **Try it out:** A space to try out search results of articles based on the search query.
4. **History:** Displays the audit log of various activities performed in Knowledgebase management system to help admins and supervisors monitor the actions. Upon clicking on the listed entry, the article will be opened in the editor.
5. **Settings :** Place to import Knowledgebase articles from a CSV file.
6. **Help:** Provides description about various concepts/actions

The search panel can be used to perform any search activity, the results of which are displayed in the center panel.

The left panel is a two-level hierarchical structure of article categories and sections. Also listed is the top articles at the bottom. This panel will be empty when you have first logged in and you will be prompted to create a new category. Once you have created several categories/sections and articles under it, the screen looks like the picture shown above.

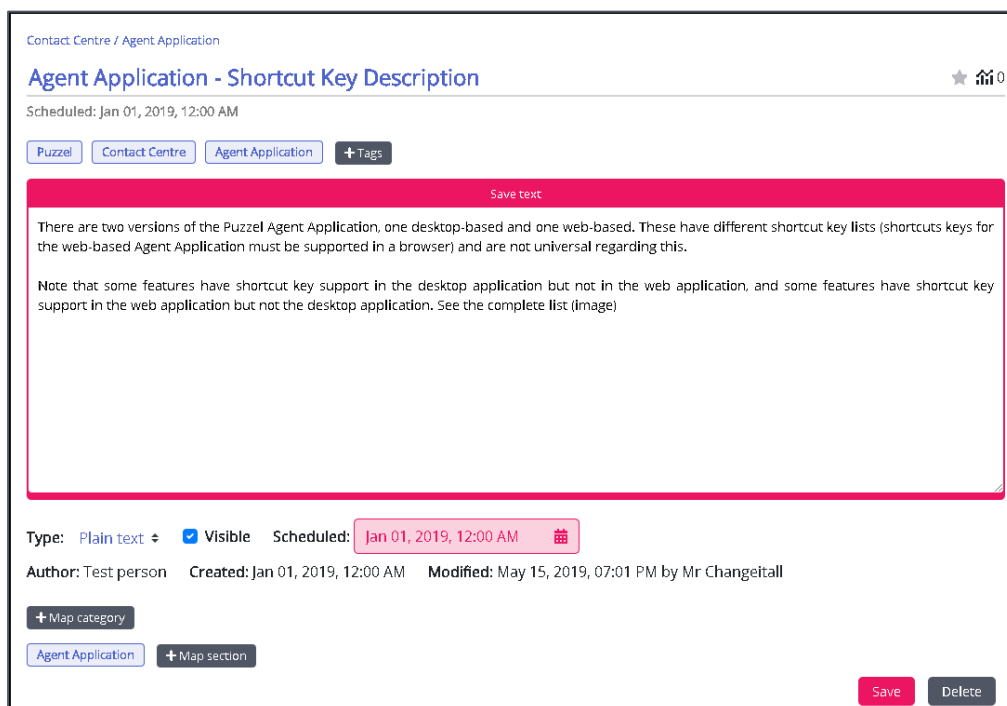
7.14.2 Inbox

The Knowledgebase article suggestions from the agents will be sent to admin for approval and are listed under Inbox as shown below.

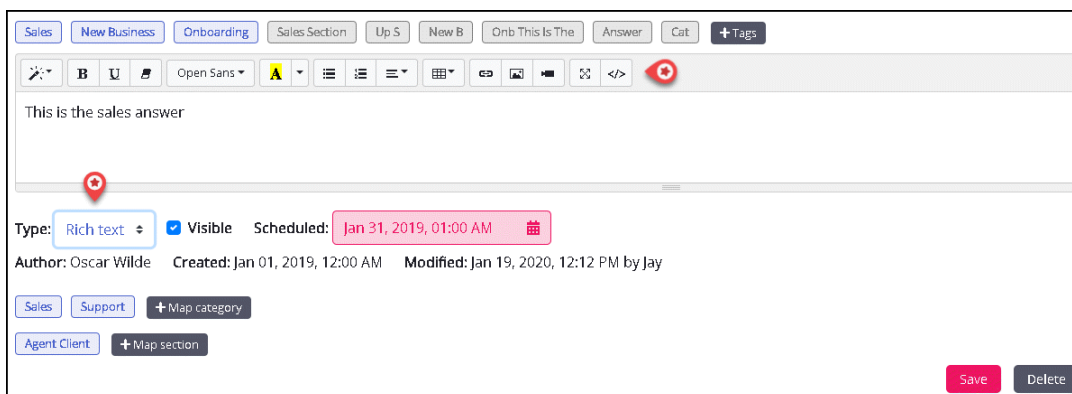


To view and approve the article:

1. Click on the article you wish to approve. This opens the article in the editor.



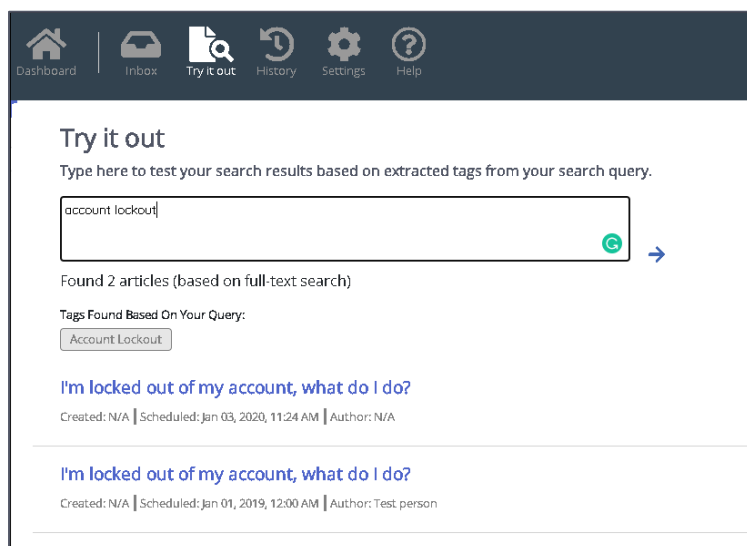
2. By default, plain text editor will be selected. Click on the drop-down menu of the **Type** attribute and select **Rich Text**. You will now be able to see the tool bar at the top. This will allow you to embed images directly from the clipboard without having to save and insert them into the article. You can also embed videos from different sources into your article. Edit the article for its content, add tags, publish it, assign it to a category/section and click on **Save**.



3. You can now view the article listed in the saved category.

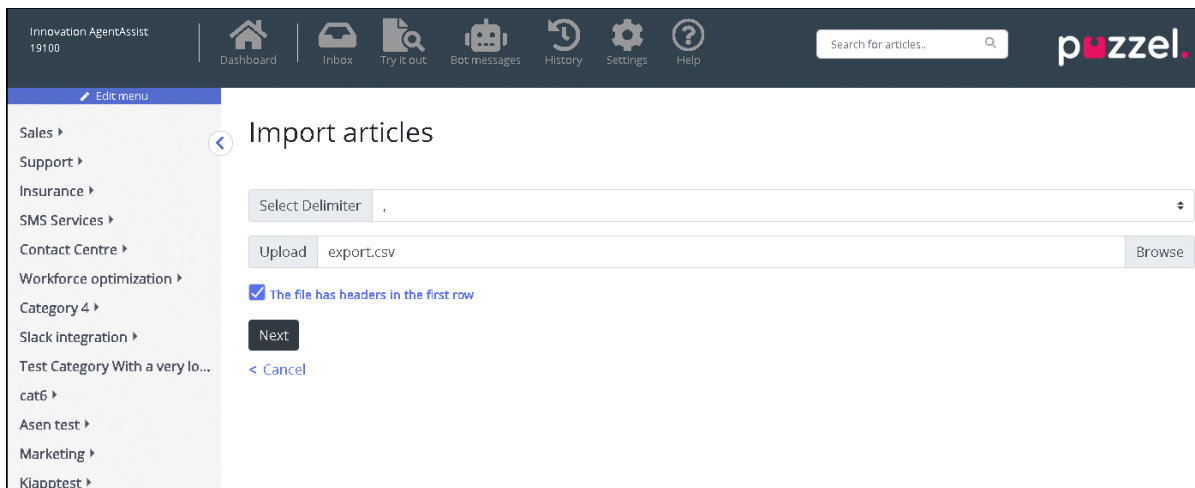
7.14.3 Try it out

Here you can test the articles, based on the query, to see if it appears in all the desired search results. When you type a question in the box, key words or phrases are extracted from the question as tags which is used to find relevant articles. In scenarios where no matching tags are found in the articles, the search engine will default to performing a full text search. A full text search will try to match words from the question to the content of the article and display these articles as results. If there are no results from the Tags based search, and a full text search is being performed, you can try to copy the extracted tags shown under the input area and tag your articles using these extracted tags for better results.

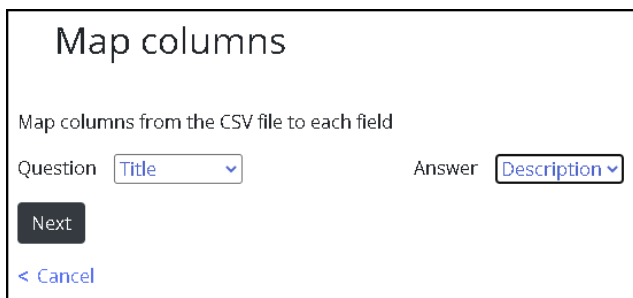


7.14.4 Settings

You can do bulk import of articles from a CSV file under the **Settings** tab. A CSV file will essentially have two columns for question and an answer. Click on **Import articles from CSV** to take you to the **Import articles** screen.



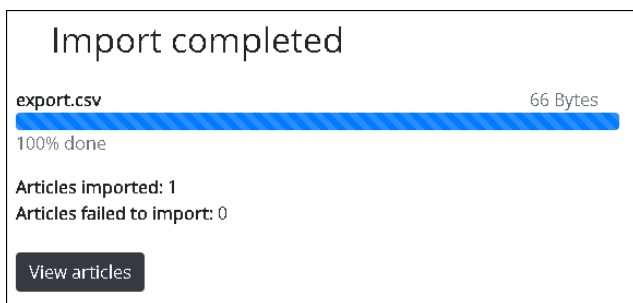
Upload the CSV file and click **Next** to go to the **Map columns** screen. Map the headings in your CSV file to the Question and Answer fields and click **Next**.



You can now preview the articles you wish to add to the Knowledgebase Management System. Click on **Start Import** to begin the import process.



Once the import has been successfully completed, you will be able to see the article listed in the Inbox section under the **Imports** category.



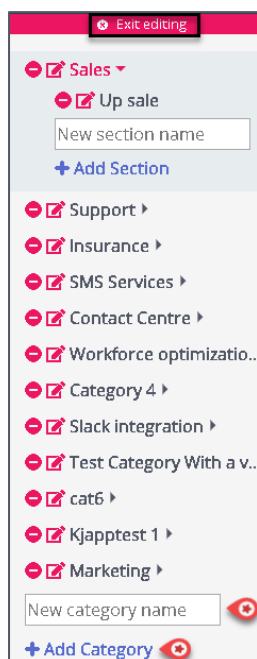
7.14.5 Category and section

A category is a broad top-level grouping of articles and can have one or more subcategory called sections under it. Grouping the articles into categories will help reduce complexity of the layout and favors consumption of information more effectively.


Each article in the Knowledgebase can belong to one or more categories but as a rule must belong to at least one category/section for it to be saved. Similarly, an article can belong to one or more sections from same or different categories.

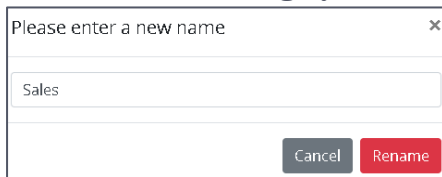
To create a new category:

1. Click on the **Edit menu** option at the top of the left panel
2. Enter the category name in the empty box provided at the bottom and click on **Add Category** button below it. You will now see a new category appended to the list.
3. Click on **Exit editing** at the top of the left panel to confirm the changes.




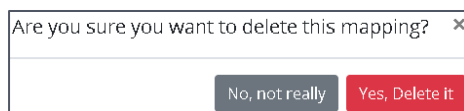
To rename or edit the category name:

1. Click on the edit icon  to the left of the category name
2. Enter a new category name



3. Click on **Rename** to save the changes

To delete a category, click  icon to the left of the category name. You will be asked for confirmation before deleting it.

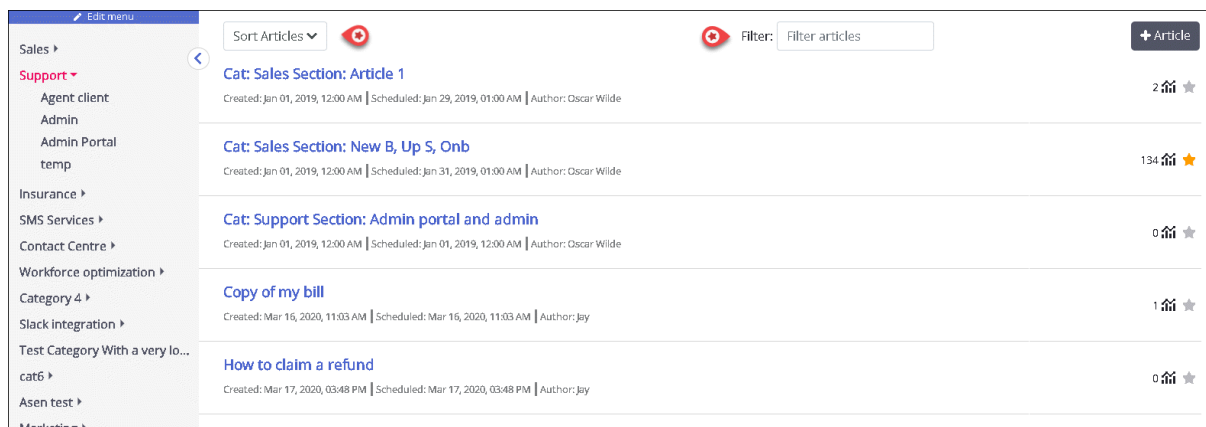


Warning: Please note that all articles under the category will also be lost when the category is deleted. If you wish to retain the articles, ensure to map it to other category or section before deletion.

Note: You can create/rename/delete sections in a similar way

Sort and filter articles

You can alphabetically sort the articles for the selected category by clicking on the Sort articles button on the top of the screen. Also available is the filter functionality which allows you to filter the articles based on title of the article, creation date, and author.



Sort Articles	Filter: Filter articles	+ Article
Cat: Sales Section: Article 1	Created: Jan 01, 2019, 12:00 AM Scheduled: Jan 29, 2019, 01:00 AM Author: Oscar Wilde	2 📊 ⭐
Cat: Sales Section: New B, Up S, Onb	Created: Jan 01, 2019, 12:00 AM Scheduled: Jan 31, 2019, 01:00 AM Author: Oscar Wilde	134 📊 ⭐
Cat: Support Section: Admin portal and admin	Created: Jan 01, 2019, 12:00 AM Scheduled: Jan 01, 2019, 12:00 AM Author: Oscar Wilde	0 📊 ⭐
Copy of my bill	Created: Mar 16, 2020, 11:03 AM Scheduled: Mar 16, 2020, 11:03 AM Author: Jay	1 📊 ⭐
How to claim a refund	Created: Mar 17, 2020, 03:48 PM Scheduled: Mar 17, 2020, 03:48 PM Author: Jay	0 📊 ⭐

7.14.6 Top articles

Articles that are frequently used by the agents or explicitly marked as top article while creating/editing it, are listed in this section. The article marked as top will take the precedence in the listing to the articles that have high usage count.

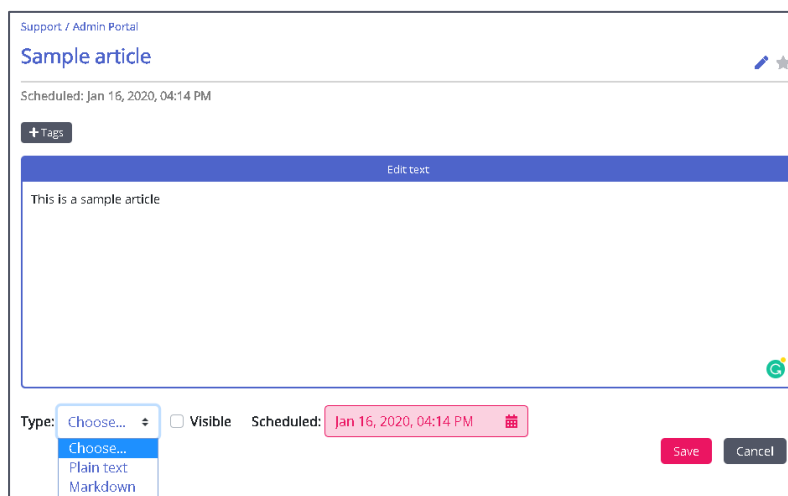
For example: An article marked as top with a usage counter of five will still be listed higher than the article **Not** marked as top with a usage count of 50.

An article is a small write up about a product/functionality/service that the agent can go through to resolve a customer query.

Creating/editing an article

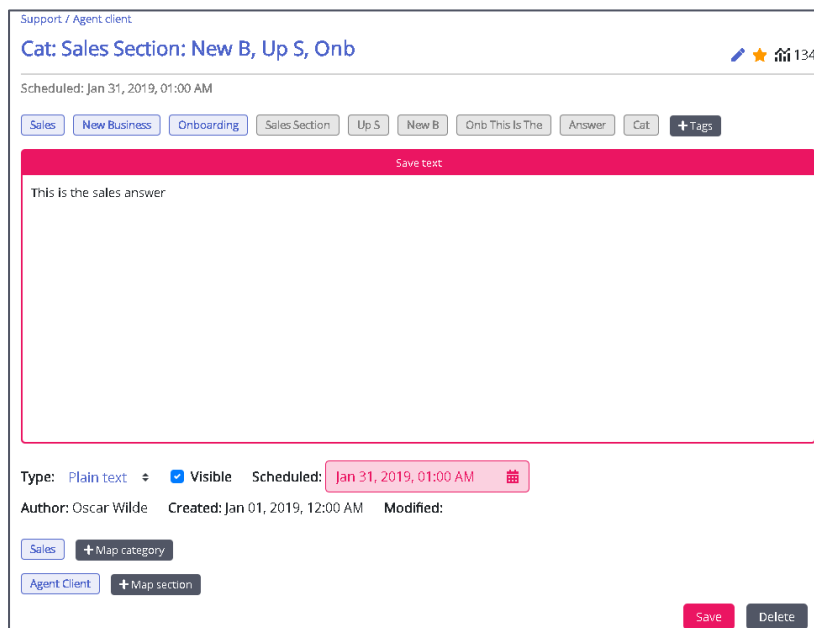
To create a new article, do the following:

1. Select the category/section in the left panel you want the article to be in.
2. Click on the **+ Article** in the center panel to open the editor



3. Enter the title of the article. For example; Sample article
4. Enter the content of the article
5. Click on the **★** icon at the top right to list it as the top article
6. Choose the formatting style of the body text; plain or marked down from the drop-down list
7. Select the **Visible** option if you intend to publish it immediately or schedule it for a later date by selecting the date and time under **Scheduled** option. By default, current date and time is selected.
8. Click on the **+ Tags** button to enter custom tags for your article.
9. Click on **save** button to save the changes and exit the editor.

To edit an existing article, select the article to open it in the editor. You can make changes to the content, add custom tags, link the article to different categories/sections or unpublish it based on the requirements.



Tags can be of two types:

- NLU tags [auto generated based on the title and content, represented in grey]
- Custom tags [created by the user, represented in blue]

Note:

For a new article, NLU tags will be added only upon saving the article.

Custom tags gain precedence over NLU tags during article search.

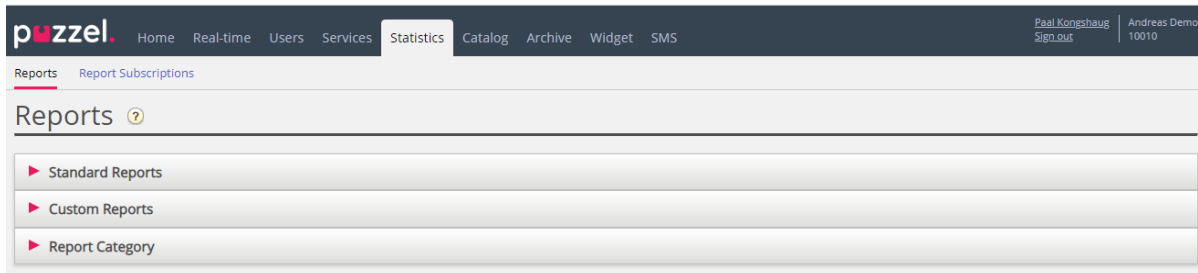
NLU tags cannot be edited or deleted.

The usage counter at the top right corner specifies the number of times the article has been used by the agent during customer interaction. This also acts as a criterion for the articles to be listed at the top.

To delete an article, select the article you want to delete to open in the editor and click on the delete button on the bottom left corner.

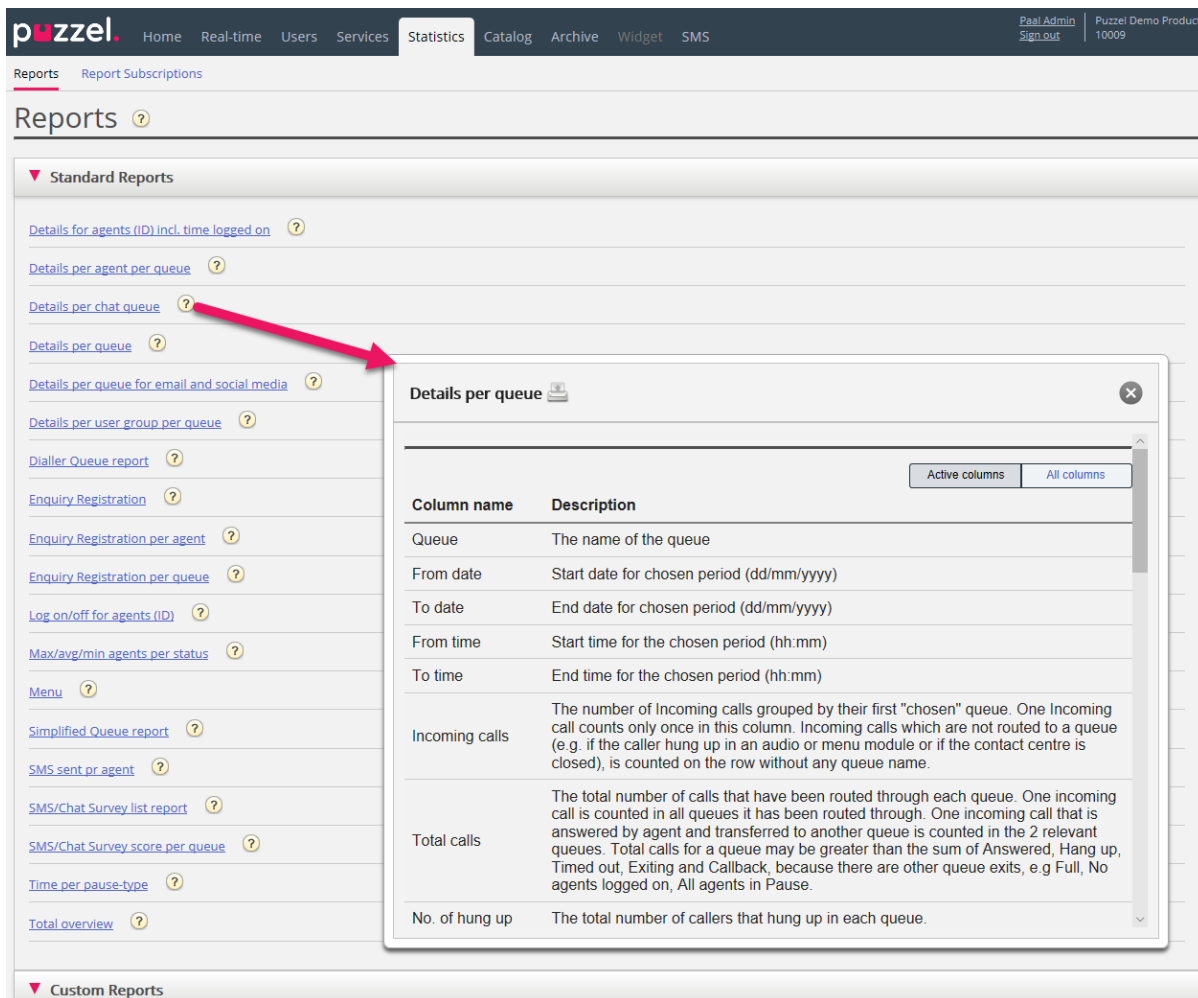
8 Statistics

A variety of Standard Reports are available, and you can make your own Custom Reports. You can create report categories and put your Custom reports in different categories to get a better overview and to simplify access control.



8.1 Standard reports

Here you will find all the standard reports your company has access to.



The question mark (?) next to each report contains a complete report description.

We also recommend the Statistics section on help.puzzel.com, where we have described the different report levels, how callback is reported and other topics:

<https://help.puzzel.com/hc/en-us/sections/115000336769-Statistics>

In statistics, calls and written requests are shown in the relevant system queue (not in Display queue).

Select the desired report to open a new browser tab where you can change parameters for the report. You can choose service number, time period and how your time elements are grouped e.g. by quarter, hour, day etc.

Change Parameters - Details pr queue

Service Number: 81511569

From: Yesterday To: Last week To: Last month

From: [] To: [] Limit time range (00:00-24:00) [Advanced setting](#)

Group By Time Element: (no grouping), Quarter, Hour, Day, Week, Month

View report Customise

8.1.1 Defining Time Period

Defining a time period for a report can be done manually or by using the Time helper-buttons. The Time helper-buttons help you to select a time range quickly. There are buttons available for Day, Week and Month. You can browse through time periods by using the arrows next to the Time-range buttons and move between dates, weeks and months.

Change Parameters - Details pr queue

Service Number: 81511569

From: Yesterday To: **Last week** To: Last month

From: 17-04-2017 00:00 To: 23-04-2017 24:00 Limit time range (00:00-24:00) [Advanced setting](#)

Group By Time Element: (no grouping), Quarter, Hour, Day, Week, Month

View report Customise

Calendar: April 2017

Time: 00:00

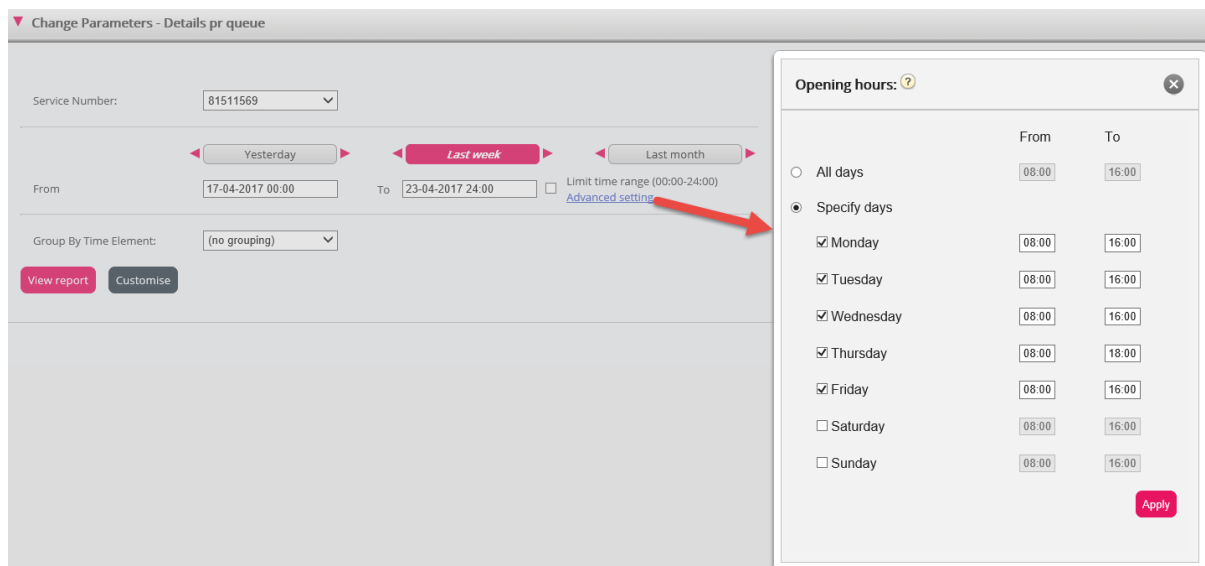
Hour: [] Minute: []

Now OK

You can also choose to set the time period manually by typing it in, or by using the calendar which will appear when moving your cursor to the From or To field.

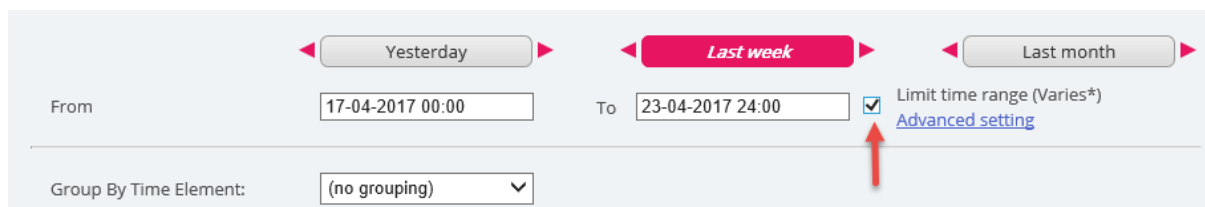
Statistics reports are as default stored for 1200 days unless another storage time is agreed. If you want to store agent reports (reports with numbers per agent) shorter than statistics on overview/queue level, contact Puzzel support so that we can configure shorter storage time for agent statistics (e.g. 365 days).

If your report is for a longer period than one day, you can use *Limit time range* to customise the time parameters for your report. You can generate a report only within your opening hours, e.g. Monday-Wednesday and Friday 08:00-16:00 and Thursday 08:00-18:00.



To do this, click on the *Advanced settings* link to open the Opening hours window, where you can configure the time range for each day.

First select time for *From* (08:00) and *To* (16:00), then click Specify days and adjust the time for the different days. Then click *Apply*, and finally tick in the checkbox for using the time limitations.



If you want to generate a monthly or weekly report for the night shift, you can do this by entering e.g. *From 23:00 and To 07:00*. If the *From* time (e.g. 23:00) is later than the *To* time (e.g. 0700), this is interpreted as if the *To* time is the next day.

When you have generated a report by clicking the *View Report* button, the report will appear, and the Change parameter part is minimised. Hover over any column name and a description of the column will appear.

Change Parameters - Details pr queue

Customer: [] Service Number: [] / Time Period: 17/04/2017 - 24/04/2017 / Generated: 26/04/2017 08:55:00 (GMT+02:00)

Details pr queue

Queue	Incoming calls	Total calls	No. of hung up	No. of hung up within 20 sec.	Call-back requests	Timed out	Exiting queue	Answered (excl call-backs)	Answered call-backs	Answer rate (%)	Avg. time in queue for answered	Longest queue-time for answered	Avg. time in queue for hang up	Longest queue-time before hang up	Avg. speak time	Max. speak time	Answered within 10 sec.	Answered within 15 sec.	Answered within 20 sec.	Answer within 20 sec.
Callout	3	3	0	0	3	0	0	0	1	33%	0:00:11	0:00:35	0:00:00	0:00:00	0:01:21	0:00:47	NaN	NaN	NaN	NaN
Sales	5	5	0	0	0	0	0	5	0	100%	0:00:09	0:00:09	0:00:00	0:00:00	0:08:33	0:25:35	60%	80%	80%	80%
Support	1	1	0	0	0	0	0	1	0	100%	0:00:09	0:00:09	0:00:00	0:00:00	0:01:43	0:01:43	100%	100%	100%	100%
Total	9	9	0	0	3	0	0	6	1	78%	0:00:11	0:00:35	0:00:00	0:00:00	0:06:32	0:25:35	67%	83%	83%	83%

8.2 Save Report as File

When you have generated your report, you can save it by clicking the save button.

Change Parameters - Details pr queue

Customer: 1511569 / Time Period: 17/04/2017 - 24/04/2017 / Generated: 26/04/2017 08:55:00 (GMT+02:00)

Save as:

- XML file with report data
- PDF
- MHTML (web archive)
- Excel 2003
- Excel
- TIFF file
- Word

Queue	Incoming calls	Total calls	No. of hung up	No. of hung up within 20 sec.	Call-back requests	Timed out	Exiting queue	Answered (excl call-backs)	Answered call-backs	Answer rate (%)	Avg. time in queue for answered	Longest queue-time for answered	Avg. time in queue for hang up	Longest queue-time before hang up	Avg. speak time	Max. speak time	Answered within 10 sec.	Answered within 15 sec.	Answered within 20 sec.	Answer within 20 sec.
Callout	3	3	0	0	3	0	0	0	1	33%	0:00:11	0:00:35	0:00:00	0:00:00	0:01:21	0:00:47	NaN	NaN	NaN	NaN
Sales	5	5	0	0	0	0	0	5	0	100%	0:00:09	0:00:09	0:00:00	0:00:00	0:08:33	0:25:35	60%	80%	80%	80%
Support	1	1	0	0	0	0	0	1	0	100%	0:00:09	0:00:09	0:00:00	0:00:00	0:01:43	0:01:43	100%	100%	100%	100%
Total	9	9	0	0	3	0	0	6	1	78%	0:00:11	0:00:35	0:00:00	0:00:00	0:06:32	0:25:35	67%	83%	83%	83%

You can choose between from several formats, e.g. Excel, mhtml and pdf.

When you have chosen a format, please follow the instructions in your browser to save and/or open the report.

The reports are scaled differently depending on the format you choose. In some formats, reports with many columns or rows will be spread over two or more pages.

8.3 Custom Reports

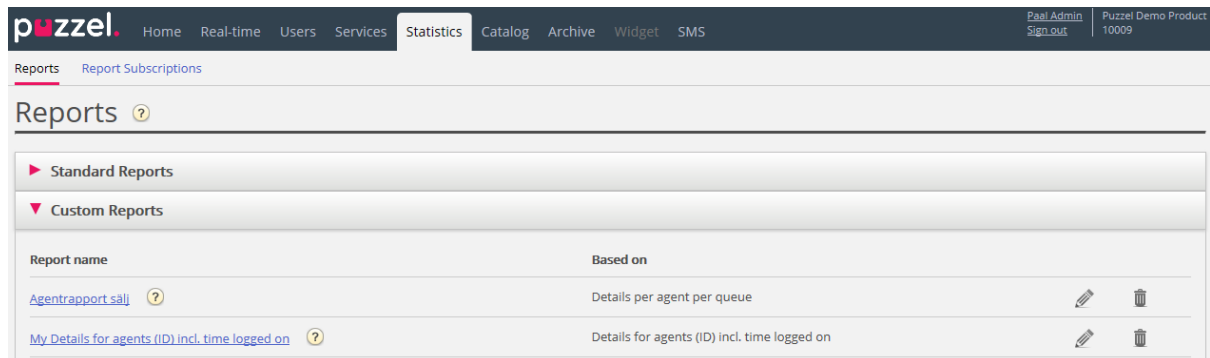
You can customise a standard report by clicking on the *Customise* button.

◀ Yesterday ▶
◀ Last week ▶
◀ Last month ▶

From To Limit time range (00:00-24:00) [Advanced setting](#)

Group By Time Element:

When you or someone in your company has customised a report and saved it, this new report will appear in The Custom reports accordion for future use.



8.3.1 How to Customise a Report

When you click the *Customise* button the Customise window will appear.

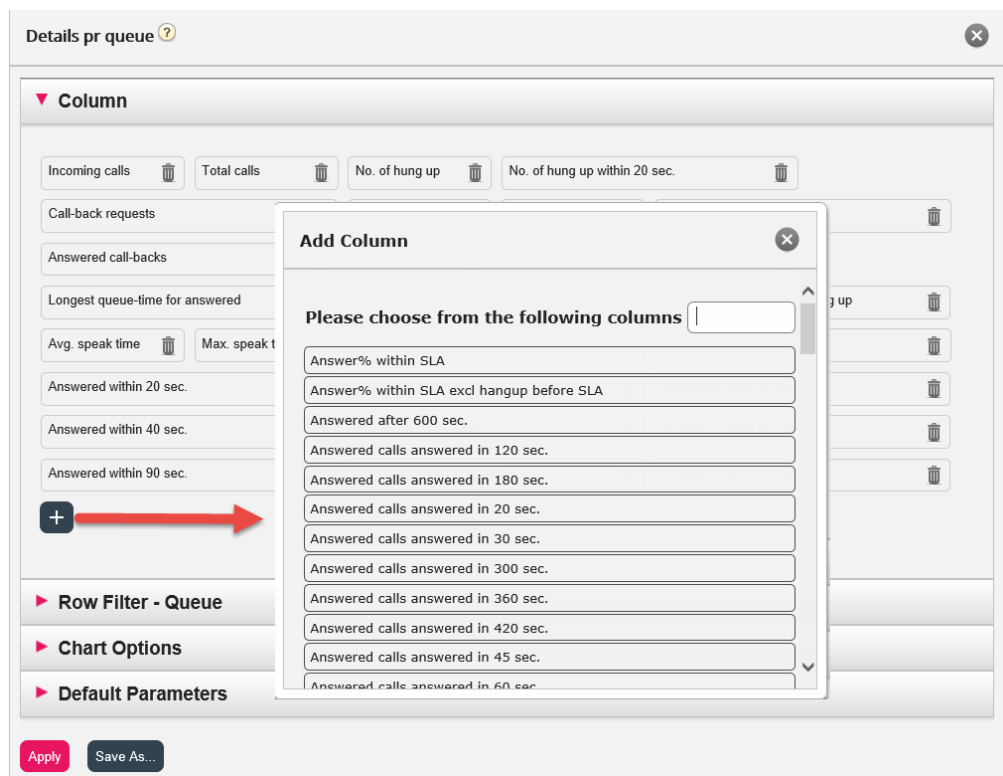


In this window you can choose to filter the rows and columns that should be included in the report, and some reports have chart options. The content in this window varies depending on report chosen.

If you have a Resource Filter applied to you, some row elements may not be available. If you have access to edit a report that contains elements that you don't have access to (because of Resource Filter) you cannot delete these elements. You will see a padlock symbol next to the element.

8.3.2 Customising Columns

In the *Column* accordion you will always start with a set of default columns. You can remove a column by clicking on its garbage bin. To add one or more columns, click on the + sign to open the *Add column* window.

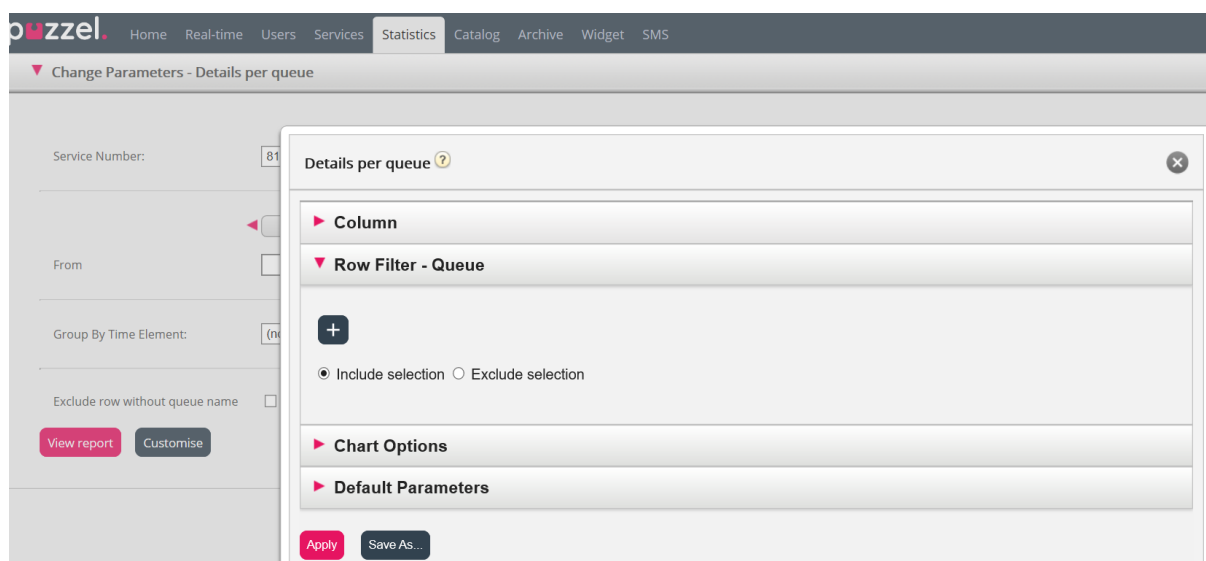


The columns for this report that have not yet been chosen are listed. To add a column to the report, click on the column name. Then close the window and click *Apply* and View report, or continue to customise Rows and/or set Default parameters.

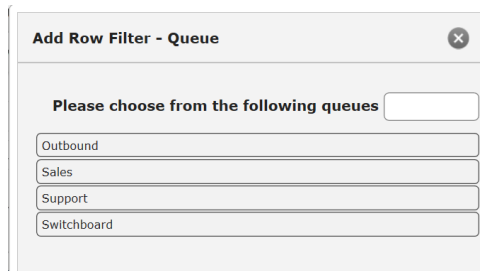
8.3.3 Customising Row Filters

As default, all rows (e.g. agents, user groups, queues) are shown in a report.

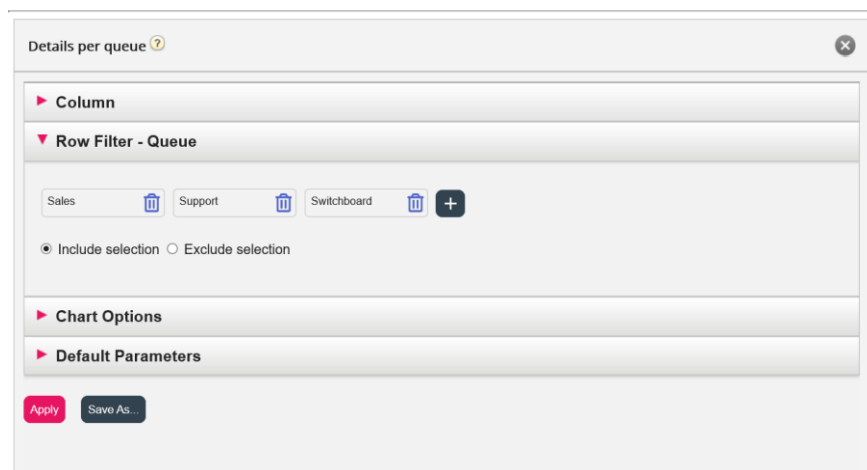
You can add a row filter with one or more entries if you want to show only the selected ones or exclude the selected ones.



To add elements to a Row Filter, click the + sign to open a new window with the elements available for this report. In Details per queue, all queues are shown:



Click on the elements (here queues) you want in the filter, and then close the window. You will now see the selected elements in the row filter.



You can remove elements from a row filter by clicking the Garbage bin.

The default is *Include selection* (show only selected elements/rows in the report), but you can change to *Exclude selection* if you want the report to show all elements except the selected ones.

Click *Apply* to close the Customise window and then click View report to generate it, or configure more in the Customize window.

8.3.4 Chart options

Some of the reports have chart options. Here you can select:

- *if table and/or chart should be shown*
- *which column you want to show in the chart*
- *what kind of chart you want (Pie, Colum or Line chart).*
- *if all (default) or just the top top 5/10/15/20 rows should be shown.*

The screenshot shows a dialog box titled "Details pr queue" with a close button in the top right. It contains several sections:

- Column**: A section with a right-pointing arrow.
- Row Filter - Queue**: A section with a right-pointing arrow.
- Chart Options**: A section with a downward-pointing arrow. It includes:
 - Radio buttons for "Show Table" (checked) and "Show Chart".
 - A "Chart type:" dropdown menu set to "Pie" and a "Show values" checkbox.
 - A "Show Column:" dropdown menu set to "Incoming calls".
 - A "Rows to show:" dropdown menu set to "All".
- Default Parameters**: A section with a right-pointing arrow.

 At the bottom, there are "Apply" and "Save As..." buttons.

If you want to limit what rows that should be included in the chart (other than top x rows), you can use the *Row filter* and manually select rows that should be included.

8.3.5 Customise Default Parameters

Default parameters allow you to define certain elements, so you don't have to define them every time you want to see the report. The default parameters you can define for your reports are:

- *Service number (if you have several)*
- *From and To (e.g. Last week Monday 00:00 to Last week Sunday 24:00)*
- *Limit time range (e.g. mon-fri 0800-1600, Saturday 0900-1400)*
- *Group by time (e.g. group by Day).*

You can also decide if these parameters should be Hidden, Read only or Editable for the users of the report, through the Appearance column.

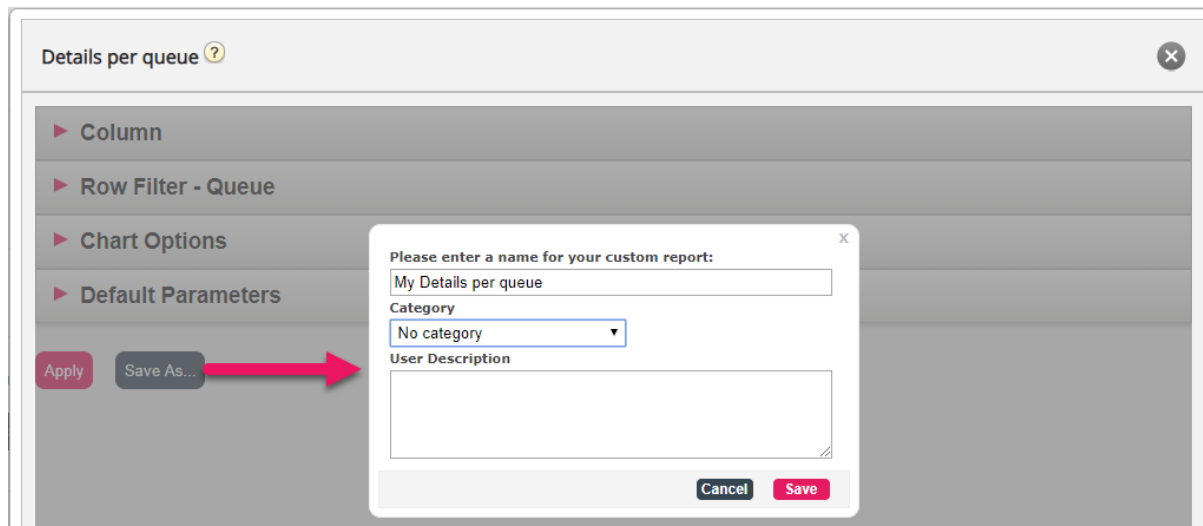
The screenshot shows the "Default Parameters" section of the configuration interface. It includes:

- A toggle for "Default Parameters:" with "On" selected (indicated by a red arrow) and "Off" as an alternative.
- A table with the following structure:

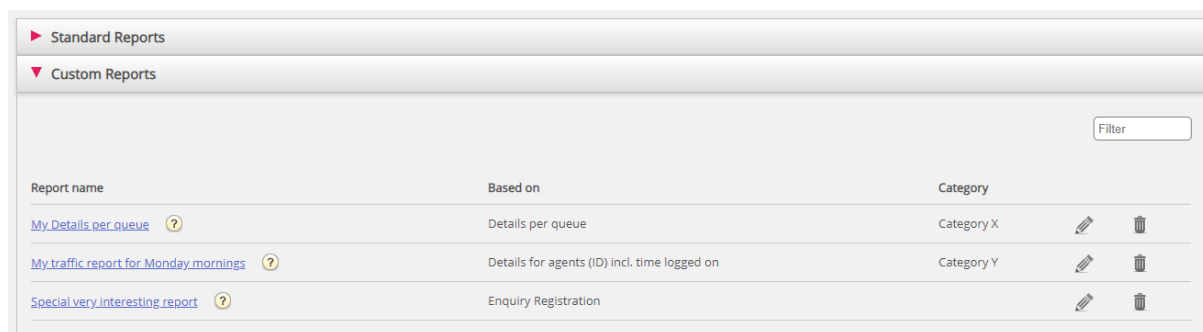
Parameter	Value	Appearance
Service Number:	81511569	Editable
From Date:	< Last week > Monday 00:00	
To Date:	< Last week > Sunday 24:00	Editable
Limit time range	<input type="checkbox"/>	
Group By Time Element:	(no grouping)	Editable

 At the bottom, there are "Apply" and "Save As..." buttons.

When you have finished customising a report, click the *Apply* button to close the window. Then click *View report* to generate the report with the defined parameters. If you want this report to be available in the future, expand the Change parameters part above the report and click *Customise*, and then click the *Save as* button. A new window will appear where you can enter a name and description for your report.



When you have saved the report, you can find it under the Custom reports accordion.



For more detailed information and further explanations about statistics, please see the articles about statistics on help.puzzel.com.

8.4 Report Subscriptions

Report subscriptions is a feature that makes it possible to send different reports automatically to different email recipients at fixed intervals, e.g. daily, weekly or monthly.

We recommend that only admin users that can see all reports and all user groups and queues in statistics have access to the Statistics – Reports subscriptions page. The

reason is that users can see and edit each other's Report subscriptions, and resource filters do not apply to report subscriptions.

You can create multiple report subscriptions. Each subscription contains one standard or one customised report to be sent to one or more email recipients. The report will be attached to the email as a mhtml file or excel file.

In the Report Subscriptions tab, you can create these report subscriptions for you and your colleagues, and you can see a list of report subscriptions that have previously been created and by whom.

Subscription name	Report	Enabled	Last edited by	Delete
▶ Monday Report	Details for agents (ID) incl. time logged on	Yes		
▶ Paal's test	Details per agent per queue	No		

+ Add Subscription

A report subscription must be *Enabled* to result in emails being sent.

8.4.1 Existing Subscriptions

All users in your company with access to this page can see and edit each other's subscriptions. Before you create a new subscription, please check if the relevant report is not already sent to other recipients at the desired time intervals. If it is, you can just add a new recipient to the existing subscription.

To see how an existing subscription is configured, you simply click the green flag and the details for the subscription will appear.

8.4.2 Create Subscription

To create a subscription, you simply click the *Add Subscription* button. A new subscription with 3 different tabs will appear.

8.4.2.1 Report and email recipients

In this tab you need to choose a report, fill out information like Subscription name, report description, email recipients, and choose file format.

Subscription name	Report	Enabled	Last edited by	Delete
▼ Monday Report	Details for agents (ID) incl. time logged on	Yes		
<div style="display: flex; justify-content: space-between;"> Report and email recipients Parameters Scheduling </div>				
Subscription name*	Monday Report			
Report description	Report for each Monday			
Select report*	Details for agents (ID) incl. time logged on			
Email To*	john@myfirm.com;jane@myfirm.com			
Email Cc	david@myfirm.com			
Email Subject	Monday Report			
Email Body	Hi this is report we will discuss during our Monday morning meetings.			
Report language	EN			
Report file format	Excel			
Save				

8.4.2.2 Parameters

These are the same parameters as can be used when a report is customised (Columns, Rows and Default parameters). If you have chosen a customised report in this report subscription and this customised report has defined any Default parameters, they will appear here. If you change some of the parameters here, e.g. the opening hours (Limit time range), the new time range will be saved with this report subscription only.

For reports used in report subscriptions, we recommend defining *Limit time range* only in the report subscription to avoid maintaining time ranges in two places or having different time ranges in the report and the subscription.

Subscription name	Report	Enabled	Last edited by	Delete
▼ Monday Report	Details for agents (ID) incl. time logged on	Yes		
<div style="display: flex; justify-content: space-between;"> Report and email recipients Parameters Scheduling </div>				
Service Number:	81511567			
From Date:	< Last week >	Monday	00:00	
To Date:	< Last week >	Sunday	24:00	
Limit time range	<input type="checkbox"/>			
Group By Time Element:	(no grouping)			
Include agents without traffic but with logon time	<input type="checkbox"/>			
Save				

If you want a daily report for weekdays, you should select Parameters From Yesterday 00:00 To Yesterday 24:00 (and under Scheduling you should check days Tuesday - Saturday and select a Time between 03:00 and 07:00, since statistics for a whole day (until 24:00) is usually ready just after 02:00 the next day).

If you want daily reports for the time interval 08:00-17:00, you can under Parameters select From Today 08:00 to Today 17:00 (and under Scheduling check Monday-Friday and choose Time 20:00).

8.4.2.3 Scheduling

Here you configure when the report should be generated and sent. This must correspond to the report's defined parameters. Examples:

A daily report for Monday to Friday (Yesterday 00:00-24:00) only needs to be scheduled for Fixed days Tuesday – Saturday, e.g. at 04:00:

Report and email recipients Parameters **Scheduling**

Fixed day(s) each week Mo Tu We Th Fr Sa Su

Fixed date(s) each month Day number(s):

Time (hh:mm): Date first time: Date last time: Enabled

A weekly report (Last week) only needs to be scheduled for Fixed day Monday:

Report and email recipients Parameters **Scheduling**

Fixed day(s) each week Mo Tu We Th Fr Sa Su

Fixed date(s) each month Day number(s):

Time (hh:mm): Date first time: Date last time: Enabled

A Monthly report (Last month) only needs to be scheduled for Fixed date 1st:

Report and email recipients Parameters **Scheduling**

Fixed day(s) each week Mo Tu We Th Fr Sa Su

Fixed date(s) each month Day number(s):

Time (hh:mm): Date first time: Date last time: Enabled

If you want to send the report for several fixed dates, use a semicolon between dates.

To activate a subscription, please tick the *Enabled* checkbox and then save.

8.4.2.4 Which rows are included?

Resource filters can be used to limit what reports or what queues/user groups a user can see in Statistics, but **resource filters are not used for Report subscription**. If you want to distribute an agent report that only contains specific agents, you must save a custom report with these agents and then select it in a report subscription.

8.4.3 Categories for custom reports

If you have many customized reports, you can categorize them to get a better overview, and to make it easier to limit which reports to show for different administrators. Ref. resource filter for [Statistics report categories](#).

You can create the categories you want under accordion Report Category. To put an existing customized report into a category, click on the edit pen on the report row and

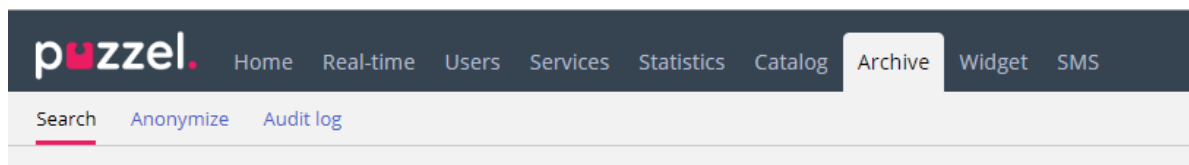
select the correct category. When you create a new custom report, you can select a category when you define name and description before you save it.

The screenshot displays the 'Reports' management interface. At the top, the navigation bar includes 'Home', 'Real-time', 'Users', 'Services', 'Statistics' (active), 'Catalog', 'Archive', 'Widget', and 'SMS'. User information for 'Paal Kongshaug' and 'Andreas Demo' is visible in the top right. The main content area is titled 'Reports' and contains a 'Filter' input field. A table lists custom reports with the following data:

Report name	Based on	Category		
My Details per queue ?	Details per queue	Category X		
My traffic report for Monday mornings ?	Details for agents (ID) incl. time logged on	Category Y		
Special very interesting report ?	Enquiry Registration			

Below the table, the 'Report Category' section allows for adding and managing categories. It features two input fields labeled 'Category X' and 'Category Y', each with a delete icon. At the bottom, there are three buttons: '+ Add category', 'Save changes', and 'Undo changes'.

9 Archive

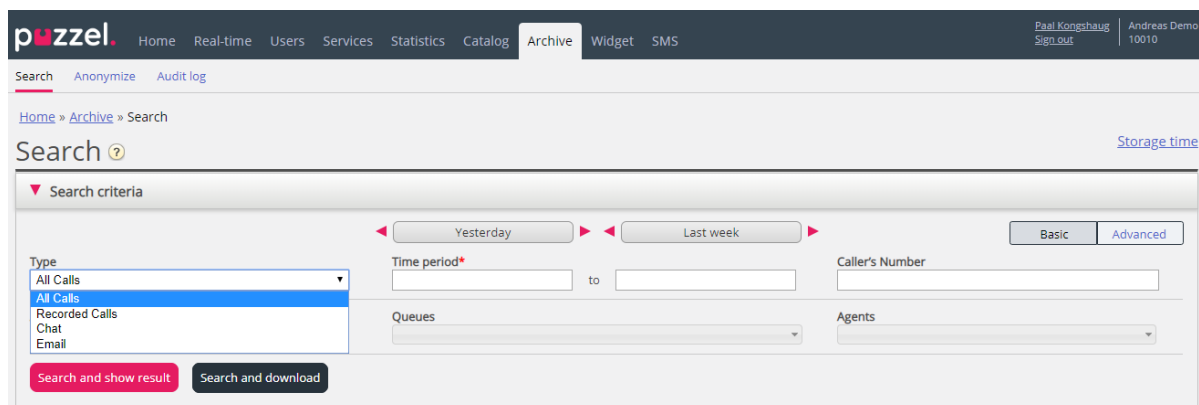


The Archive has 3 pages:

Search	This is the actual Archive where you can find information about single calls (and recordings), chats (and chat logs) and emails (including etask and Scheduled tasks).
Anonymize	Here you can enter the phone number and email address for a person that requires to be forgotten, if you want Puzzel to delete this person's phone number/email address in calls/chats/emails in the Archive.
Audit log	Here you find one record for each time a user listened to/ downloaded/ deleted a <u>call recording</u> or opened/downloaded/deleted a <u>chatlog</u> .

9.1 Search

On page *Archive – Search* you can find information about calls (and recordings), chats and emails (incl. e-task and Scheduled tasks) processed in Puzzel, and Enquiry registrations done by agents linked to these requests. In addition, SMS Survey and Chat Survey results can be shown. The actual email text/body and attachment is not available in Puzzel Archive.



To see what is included in your Archive and how long General information about requests, call recordings and chat-logs are stored, click on *Storage time*.

If the storage time for General information is longer than for recordings/chatlogs, you will find “old” calls/chats without a recording/chatlog. Each night Puzzel deletes calls/chats and recordings/chatlogs which are older than the defined storage time.

Different storage time per queue for call recordings?

If you must store call recordings from different system queues for different number of days, this is possible to configure. Two options:

- *A default Days to store call recording (e.g. 90 days) and a shorter storage time for some selected queues*
- *Only a few selected queues with a (very) long storage time for recordings, and most queues with a shorter storage time for recordings.*

To see the current storage time in your Archive, click Storage time in the upper right corner on the Archive page. Please contact Puzzel support if you want to change it.

Requests (calls/chats/emails) that are finished are transferred to the Archive every minute, with a small delay. General information about a request will usually be available in the Archive 3-5 minutes after it ended, and it usually takes a bit longer before the recording file and chat log appears. The Enquiry registration information might appear much later since the agent can do this a long time after call/chat end, and the Survey score/comment might also appear a long time after call/chat end since the end-customer might not answer right away.

9.1.1 Basic Search Parameters

Required fields:

- **Type:** Choose *All calls, Recorded calls (a subset of All calls), Chat or Email*
- **Time Period:** Use the *From/To* fields to define the time period, or use the *Time helper buttons and the green arrows.*

Optional basic search fields:

- *Access point (Phone number/Email address etc)*
- *Queue (the system queue)*
- *Agent*
- *Caller's number/Chatters Name/From.*

In list boxes (Access point, Queues, Agents) you can select one or more entries.

9.1.1.1 Wild Card Search

* can be used as a wild card in the beginning, in the middle and/or in the end of your search string in Caller's number, Chatter's Name/Email and From (email), and in the Advanced search fields Comment and Tags.

If you search for *petter* in Chatter's Name/Email you will find chats that contain petter in the chat fields Name or Email (id)

If you search for 214906* in Caller's number you will find calls that have a number that begins with 214906.

9.1.2 Advanced Search Parameters

When *Advanced* is clicked (instead of *Basic*), more search parameters are available.

- You can search for calls/chats/emails with a value for a given **Variable**.

- For Type **All calls/Recorded calls**, you can search based on e.g. Speak time, Recording time, Time before answer, Enquiry registration Categories/Topics, Survey Score/Comment and more.
- For Type **Chat**, the Advanced parameters are Speak time and Time before answer, Enquiry registration Categories/Topics and Survey Score/Comment. Speak time is the duration of the chat conversation with the agent(s), while Time before answer is the time in queue until the agent click Accept.
- For Type **Email**, the Advanced parameters are Handling time, Time before answer and Answer status (Answered/Not yet answered), in addition to Enquiry registration Categories/Topics.
 - *Handling time* (previously called *Answer time*) is the time from the agent clicked Accept until closing the email dialog tab in the Agent application. If the agent worked on an email more than once (due to time in Personal queue), Handling time is the sum of the Handling times.
 - *Time before answer* is time in queue until first agent clicked Accept. Please note that an agent may accept the email and then put it in personal queue, and pick it up the next day and then send an answer to the customer. The column *Total Time* might give an indication on how long time it took before the agent actually sent an (email) answer to the customer.

9.2 Search Results for All Calls/Recorded Calls

After defining search parameters, click the *Search and show result* button and your search results will appear.

The screenshot shows the 'Search' page in the Puzzel administration portal. The top navigation bar includes 'Home', 'Real-time', 'Users', 'Services', 'Statistics', 'Catalog', 'Archive', 'Widget', and 'SMS'. The user is logged in as 'Paal Admin' with a 'Sign out' option. The search criteria are set to 'All Calls' for the type, 'Friday' for the day, and '12-10-2018 00:00' to '12-10-2018 24:00' for the time period. The search is completed, showing 2 records found.

Start	Access Point	Recording Time	Speak Time	Caller's Number	Time before answer	Agent(s)	Select
▶ 12.10.2018 11:33	95510009	0:00	0:00	[Redacted]	-	-	<input type="checkbox"/>
▶ 12.10.2018 12:39	81511569 (Main...)	15:05	15:05	[Redacted]	0:35	Andreas Wallin	<input type="checkbox"/>

If you want to download the general information about calls, click *Search and download*. See [Download General information about requests](#) for more details.

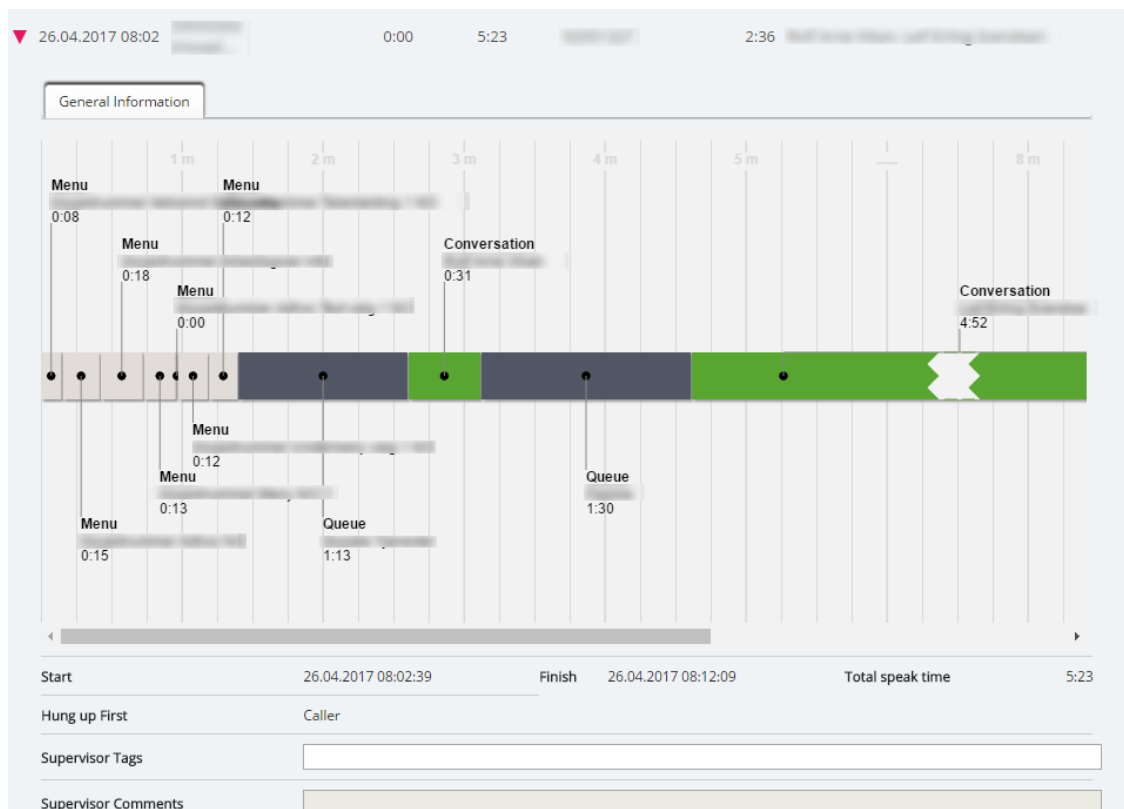
If you are looking among All calls you can distinguish calls that have not been recorded by the fact that they have 0:00 Recording Time and they will not have a play button next to them.

If you see more than 1 name in the Agent(s) column, the recorded call was handled by 2 separate agents, meaning the call was transferred to another agent at some point during the conversation. If both “conversations” were recorded, then the play button will have a + within it indicating that 2 recordings are available.

By clicking the green play button next to the call, you can see the graphical flow of the chosen call/recorded call.

9.2.1 General Information for Calls

In the tab General information, you can see the graphical flow of the call, i.e. how long the caller was in queue, agent(s) he/she spoke to, speak time etc. If the bar in the chart is “broken”, the caller has spent more than 3 minutes in that activity (in queue or in conversation).



In this example, you can see that the caller has had a conversation that lasted more than 3 minutes to demonstrate that we have “broken” the conversation bar.

In the Supervisor Tags field, you can enter a tag (e.g. “Complaint”), so that it will be easier to find it later. You can also add a comment (if a Tag is entered).

If you want to find this call (recording) or other calls you have tagged “complaint”, you simply write the word “complaint” in the Supervisor Tag (Advanced) search field.

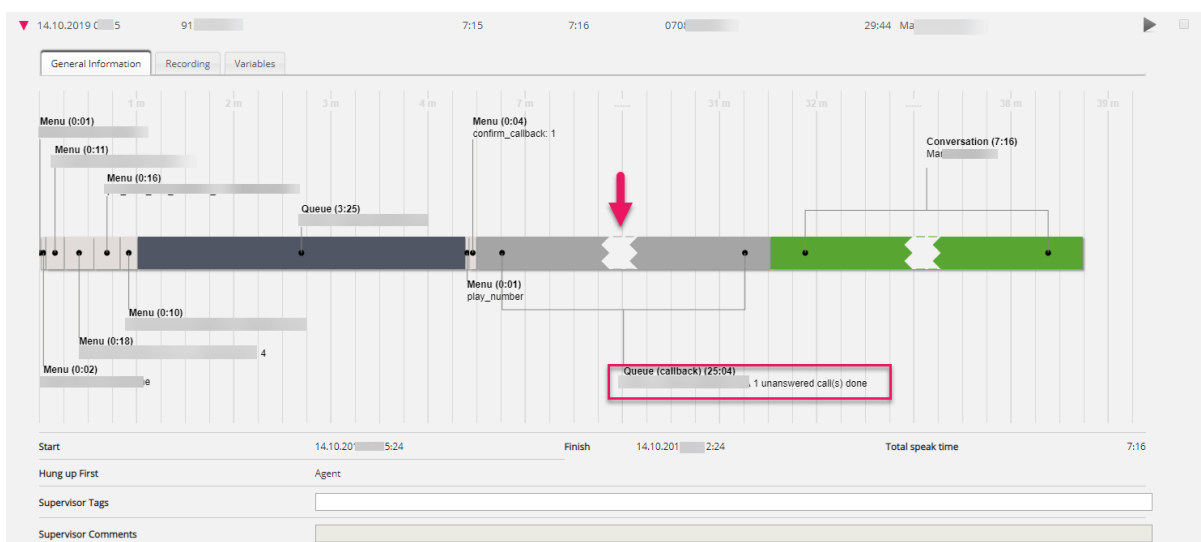
9.2.1.1 Callback in queue, outbound calls and Dialler

Callback in queue

When a customer orders callback in queue, it takes some time from callback is ordered until the callback is done. When the customer is first in queue, the agent is called, and when agent answers, the customer is called, but it’s not sure the customer answers. It is possible to configure that a 2nd and a 3rd callback attempt is done.

For an incoming call where the caller ordered callback, there will usually be 1 or more menu events first, and then a queue event, and then 1-2 menu events where callback is ordered/confirmed. For the time between the callback was ordered and the time when agent answered, we create a special event called “*Queue (callback)*”, with label “1 unanswered call done” (or 2 or 3).

Example:



If the callback was answered by the customer’s voicemail, the duration of the conversation event will be short (even if agent left a message).

If you find a call in Archive after callback is ordered but before the actual callback call is done and has ended, you will only see the menu events and the queue event, not the “Queue (callback)” and the Conversation event.

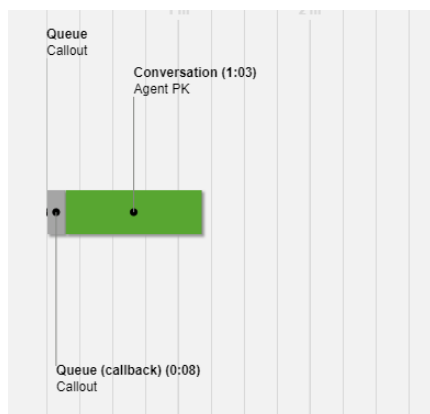
If the callback is deleted from queue, there will be a red Deleted event.

Outbound calls

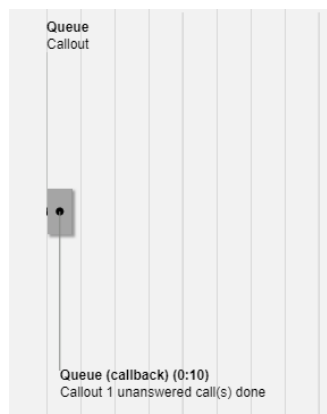
When an agent makes an outbound call to a phone number (possibly from the catalog), this will be shown in the Archive in a queue called e.g. Callout or Outbound, and the called number will be shown as “Caller’s number”.

For outbound calls, the Archive shows:

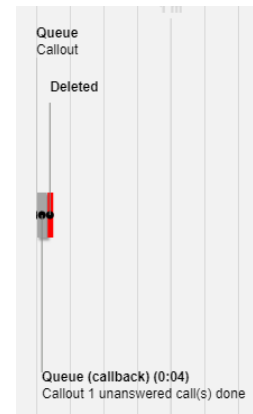
- 1 **Queue** event with no duration, when call was ordered
- 1 **Queue (callback)** event with duration from call ordered until destination answer (this is the ring time experienced by the agent), or until busy/reject/error or until agent hangs up while it’s ringing
- 1 **Conversation** event only if the destination answered. This event has duration from destination answered until the call ended.



Answered outbound call



Unanswered outbound call



Cancelled call

For an unanswered outbound call, the **Queue (callback)** event also shows the text “1 unanswered call done”.

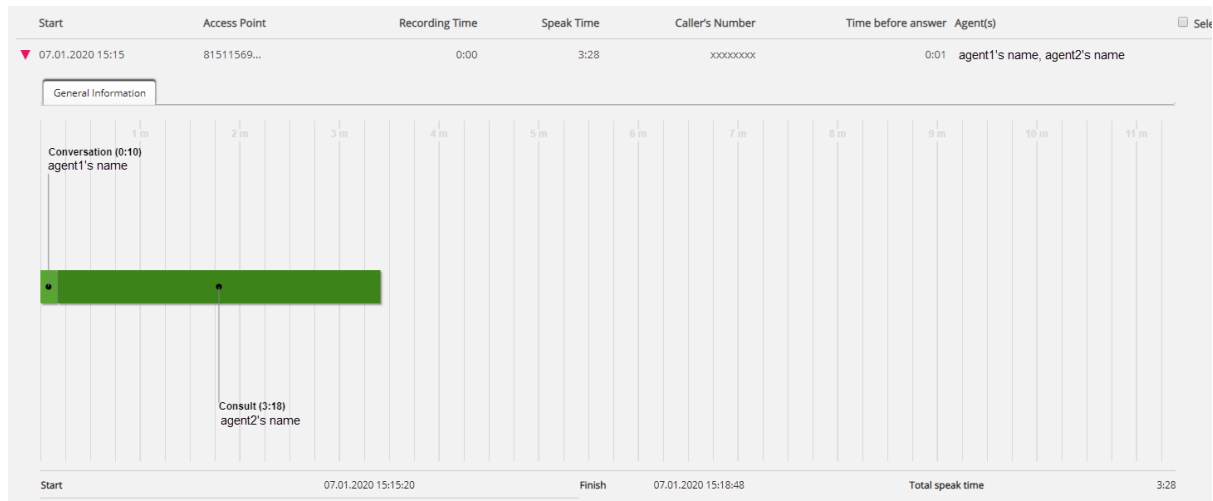
If the agent stops an already started outbound call by clicking *Cancel/Hang-up* in the Outbound call tab instead of clicking *Softphone Hang-up*, there might be an extra red event with text *Deleted* since the call was “deleted” from queue.

Agent-to-agent calls

If agent1 makes an outbound call to agent2, this call may be answered by agent2 or not. Such an agent-to-agent call will be shown in the Archive with agent1 as the Agent and

“xxxxxxx” as the Caller’s number, and there will be no queue event. If agent2 answered, this will look like a **consult call** initiated by agent1, that is, a short *Conversation* event for agent1 and a longer *Consult* event with agent2.

In this example agent1 called to agent2, who answered after 10 sec ringing, and the conversation lasted 3:18, so agent1’s total Speakttime was 3:28.



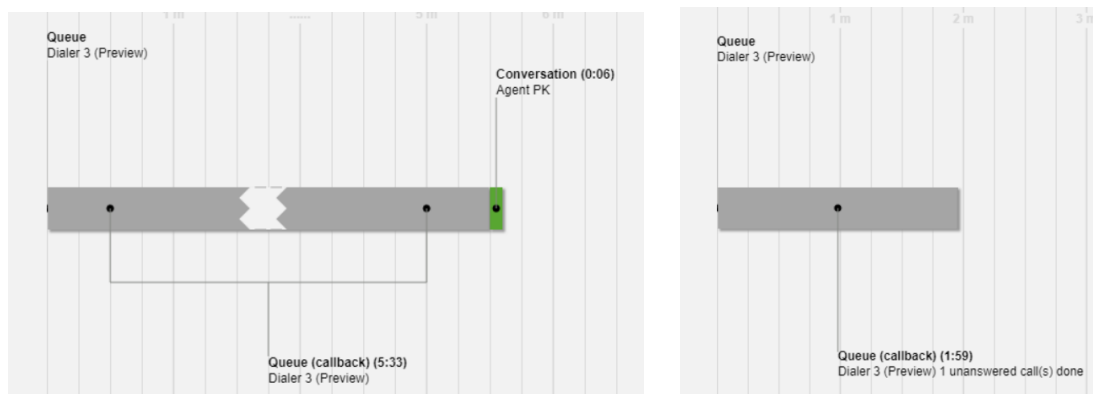
Time before answer is only 1 sec, since agent1’s softphone auto-answered.

If agent1 called to agent2 and agent2 did not answer, there will only be a short *Conversation* event for agent1 (e.g. 30 sec) and no *Consult* event, and agent2 will not be listed as an involved Agent since he did not answer.

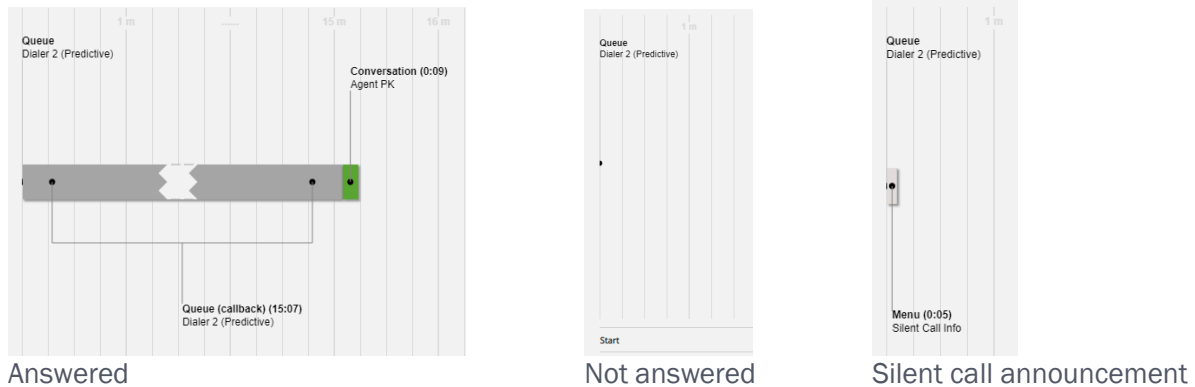
Dialler

Preview Dialler calls are shown in Archive in the same way as outbound calls, that is, we show a *Queue* event (with duration=0), a *Queue (callback)* event and possibly a *Conversation* event.

The *Queue (callback)* event’s duration represents the time from the contact was put in Dialler queue until contact answered (or call end due to no answer).



With **Predictive/Power/Progressive** mode, the Dialler calls the contact first, and an agent is called only if the contact answers (and agent is available). If the contact did not answer, there will be a *Queue* event with no duration, a *Queue (callback)* event and a *Menu* event only if a silent call announcement was played to the contact.



Welcome message to caller and agent when agent answers

When an agent answers a call from queue, we join the caller and the agent immediately. If your solution is configured to play a short message to the caller and the agent when the agent answers, this short message might be shown as a *menu event* after the conversation event in the chart, since the conversation event started first.

9.2.1.2 Who hung up first

For incoming calls connected to an agent we will show who hung up first (agent or caller). Please note that the standard behaviour for a Puzzel solution is that when the caller hangs up first, the agent is disconnected, and when the agent hangs up first, the caller is disconnected. If the caller and the agent were finished speaking and said goodbye, it's not unusual that the agent hangs up first. And, remember that the connection to the caller's phone or to the agent's phone may be lost due to network problems without the caller or the agent hung up on purpose!

9.2.1.3 Caller's number for calls forwarded to Puzzel

If your company has an access number (B) forwarded to a Puzzel access number (C), Puzzel might not receive the caller's number (A) as 'Calling party number', but instead as 'Additional Calling Party number' or as 'Redirecting number'. In such cases, it looks as if all callers have the same number; the called access number (B).

When you enter a number as Caller's number and click Search, we look for match in Calling party number, Additional number and Redirecting number. This means that we may show calls in the result list with Caller's number (e.g. B) not matching your search

(for A). If an incoming call has Additional and/or Redirecting number, we will show these extra number(s) (that may match your search) under the call graph in the General info tab.

9.2.1.4 Silent Monitoring

When a supervisor orders silent monitoring on an agent, he or she enters the phone number or selects a user's Softphone to be called on (the listener's number). When the selected agent answers a call, the listener's number is called. If a call has been silently monitored, the listeners number and start and end time for the listening is shown for the call. In addition, you can search for calls that have been silently monitored by entering the listener's number or just * in the Advanced search field *Monitored by*.

9.2.1.5 Call variables

If it's configured that your solution stores the value for a specific variable in the call's raw data, this variable is searchable and visible in the Archive. Example: If the solution behalf of the caller does an external look-up in your CRM system with the caller's number as parameter, and your CRM system returns the customer number or a case id, this returned value can be stored in a variable.

If a variable is configured, you can choose the Variable name in the search list box and optionally enter a string (with * as wildcard) as Value and search. In the result part, a call that has a variable value will have a new tab called Variables where the call's variable(s) and belonging value(s) are shown.

Time	Variable Name	Variable Value
29.01.2020 12:40:00		
29.01.2020 12:40:00		
29.01.2020 12:40:00		
29.01.2020 12:40:00		

9.2.2 Recordings in Archive

Puzzel can record all calls from a system queue (forced on queue), or all calls to agents in a specific user group (forced on user), if configured. In addition, agents can click Start recording in the Agent application when needed. If the caller has not accepted (or denied) to be recorded, we will not record the call even if forced recording is configured. If the selected call was recorded, you will see a Recording tab in addition to the General information tab.

Start	Access Point	Recording Time	Speak Time	Caller's Number	Time before answer	Agent(s)	Select								
▼ 26.04.2017 10:00	81511569 (Main...	0:32	0:32	21490672	0:24	Paal Agent	▶ <input type="checkbox"/>								
<div style="display: flex; border-bottom: 1px solid #ccc;"> <div style="border: 1px solid #ccc; padding: 2px; margin-right: 5px;">General Information</div> <div style="border: 2px solid red; padding: 2px; margin-right: 5px;">Recording</div> <div style="border: 1px solid #ccc; padding: 2px;">Enquiry Registration</div> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Start</th> <th>Finish</th> <th>Queue</th> <th>Agent</th> </tr> </thead> <tbody> <tr> <td>26.04.2017 10:01:21</td> <td>26.04.2017 10:01:53</td> <td>Sales</td> <td>Paal Agent</td> </tr> </tbody> </table>								Start	Finish	Queue	Agent	26.04.2017 10:01:21	26.04.2017 10:01:53	Sales	Paal Agent
Start	Finish	Queue	Agent												
26.04.2017 10:01:21	26.04.2017 10:01:53	Sales	Paal Agent												

In the Recording tab you can see the start and finish time of the recording.

If the recorded call was transferred and the conversation with the next agent also was recorded, you will see the name of 2 or more agents in the Recording tab.

Please note that the start time for a recording is different from the start time for the incoming call in the general information tab. In the recording tab, start time is when a caller was connected to an agent if 'forced' recording is configured for the system queue or the agent. If the recording did not start automatically, the start time is the time the agent clicked *Start recording*.

9.2.2.1 Playback/Download a Recording

In the Archive, we use MP3 files for call recordings. If you click on the play button next to a recording, the MP3 sound file starts playing in your browser, unless access to playback recordings is turned off for your user. You can pause the recording at any time. Some browsers (e.g. Microsoft Edge and Firefox) also support fast forward/rewind using the 'slider'.

If you have access to download recordings from Archive, you can download the MP3 recording file by checking the select box next to the recording, and then select Download at the bottom of the page.

Start	Access Point	Recording Time	Speak Time	Caller's Number	Time before answer	Agent(s)	Select
▶ 09.04.2018 10:32	81511569 (Main...	1:00	1:09	98214836	0:08	Agent PK	▶ <input type="checkbox"/>
▶ 10.04.2018 14:24	81511569 (Main...	1:00	1:00	90020509	1:06	Andreas Wallin	▶ <input checked="" type="checkbox"/>

Select Action ▼

- Select Action
- Download
- Delete Recording(s)

If you choose to download one or more recordings, the sound files will have file name on this format: 'queuename_yyyymmdd-hhmm_accessnum_anum_sessionid_nr.mp3'. 'nr' will usually be 1, but if there are 2 recordings for the same call, there will be files with nr=1 and 2. The sound file(s) are zipped, and the zip-file gets a unique name (a GUID).

A user can be given access to delete recordings from Archive. If a recording is deleted, all Archive users will see that there was a recording for this call but that it's now deleted.

9.3 Search results for Chats

Select Type = Chat and enter your search criteria. When you click “Search and show result”, chats that match your search will appear.

The screenshot shows the 'Archive' section of the Puzzel interface. The search criteria are set to 'Type: Chat', 'Time period: 15-10-2018 00:00 to 17-10-2018 24:00', and 'Chatter's Name/Email: *petter*'. The search results table is as follows:

Start	Access Point	Speak Time	Chatter's Email (id)	Chatter's Name	Time before answer	Agent(s)	Select
▶ 17.10.2018 09:13	Chat_10009_q_ch...	0:53	petter@smart.no	Petter Smart	0:39	Agent PK	<input type="checkbox"/>

9.3.1 General Information for Chat

In the General information tab, you will find time spent in queue and chat conversation time with agent(s). This is the same structure as with phone calls.

The screenshot shows the 'General Information' tab for the chat conversation. It features a timeline chart with the following data points:

- Queue (0:38):** Chat Sales
- Conversation (0:53):** Agent PK

The timeline shows the chat starting at 17.10.2018 09:13 and ending at 17.10.2018 09:15:06. Below the chart, there are fields for 'Supervisor Tags' and 'Supervisor Comments', along with 'Save Changes' and 'Undo changes' buttons.

9.3.1.1 Who ended the chat first

For chats connected to an agent we will show who ended the chat first (*Hang up first*). The normal situation is that the chatter disconnects first, and that the agent a bit later closes the chat dialog tab in the Agent application. If the agent tries to close a chat tab in

the Agent application before the chatter has disconnected, a warning is given but the agent can close it.

9.3.2 Chat Tab

Under the Chat tab, the actual chat text is shown. If you need a copy of the text, select the text and copy it to your computer's clipboard, and then paste it into a document or email. Or, select the chat in the right margin and choose *Download* to get an xml-file with the text.

The screenshot shows a chat interface with a table at the top listing chat sessions. The selected chat is from 17.10.2018 09:13, with Access Point Chat_10009_q_ch..., Speak Time 0:53, Chatter's Email (id) petter@smart.no, Chatter's Name Petter Smart, Time before answer 0:39, and Agent(s) Agent PK. Below the table are tabs for General Information, Chat, Enquiry Registration, and Survey. The Chat tab is active, showing a conversation:

- Header: Name Petter Smart, ID petter@smart.no
- Petter Smart 09:13: 09:13 Home, 09:13 Contact us
- Agent PK 09:14: Hi! You are chatting with Agent PK. How can I help you?
- Petter Smart 09:14: just testing
- Agent PK 09:14: ok
- Agent PK 09:15: Thanks for your request. Have a nice day!
- Agent PK 09:15: Thanks for your request, and have a great day! Best regards Agent PK. You can also find answers to frequently asked questions on <https://help.puzzel.com/>

At the bottom right, there is a 'Select Action' dropdown menu.

If a chat agent sends a **file (chat attachment)** to the customer during the chat, this file name is shown as a text entry/link from the agent in the Chat text. Since the file was only temporarily stored, the link only works a short time after the attachment was sent.

If you have configured one or more (custom) chat **variables** to be used, the variables that are given value in a chat will be shown in the Variables tab for the chat.

The screenshot shows the same chat session as above, but with the 'Variables' tab selected. A red arrow points to the 'Variables' tab. Below the tabs is a table with the following data:

Time	Variable Name	Variable Value
19.12.2019 15:37:00	ip_address	195.159.166.34
19.12.2019 15:37:00	isMobile	False

An admin can be given access to delete recordings and chat logs from Archive. If a chat log is deleted from Archive, you will see the Chats General info and that there was a chat log but that it's now deleted.

9.4 Search results for Email

Media type Email in Puzzel can be ordinary emails or written requests from any system queued in and distributed by Puzzel (often called e-task). Media type Email also includes Scheduled tasks.

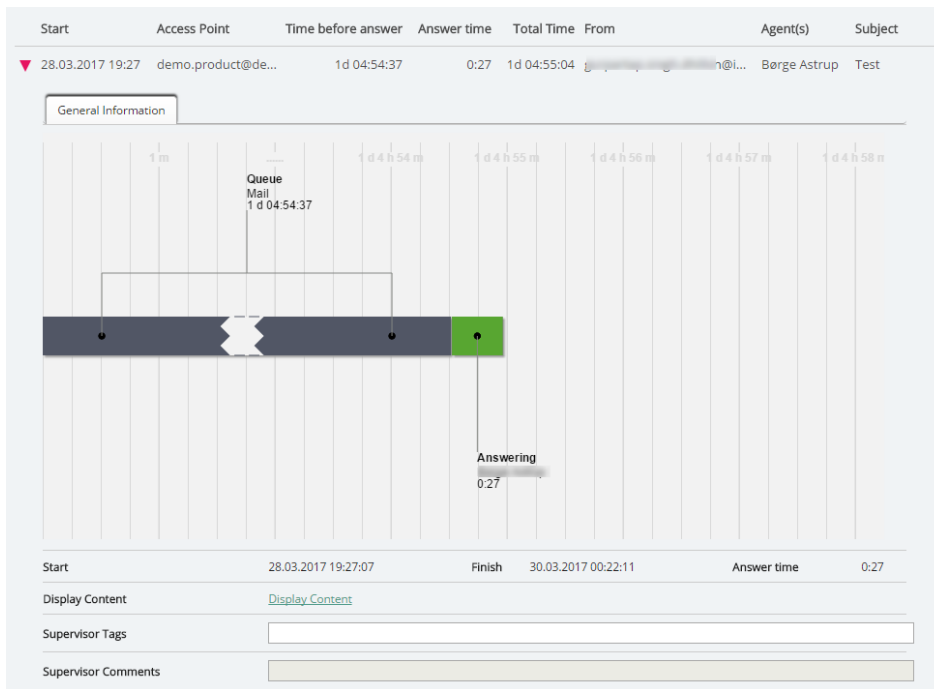
When you search, requests with media type Email that match your search will appear.

The screenshot shows the Puzzel search interface. At the top, there is a navigation bar with 'puzzel.' and 'Solving Customer Interactions'. Below that, there are tabs for 'Home', 'Real-time', 'Users', 'Services', 'Statistics', 'Catalog', 'Archive', 'Widget', and 'SMS'. The 'Archive' tab is selected. The search interface includes a search bar with 'Search', 'Anonymize', and 'Audit log' options. Below the search bar, there are filters for 'Type' (set to 'Email'), 'Time period*' (from '01-10-2019 00:00' to '15-12-2019 24:00'), 'From', 'Access Points', 'Queues', and 'Agents'. There are buttons for 'Search and show result' and 'Search and download'. Below the search criteria, there is a table of search results with columns: Start, Access Point, Time before answer, Handling time, Total Time, From, Agent(s), and Subject.

Start	Access Point	Time before answer	Handling time	Total Time	From	Agent(s)	Subject
▶ 02.10.2019 10:29	dev.10010@demop...	0:06	0:26	0:32	custo...@...m	[redacted]	Request fo...
▶ 18.11.2019 12:45	dev.10010@demop...	2:11	0:13	2:24	stefar...@...com	[redacted]	test email...
▶ 18.11.2019 12:45	dev.10010@demop...	2:31	0:14	2:45	stefar...@...com	[redacted]	test email...

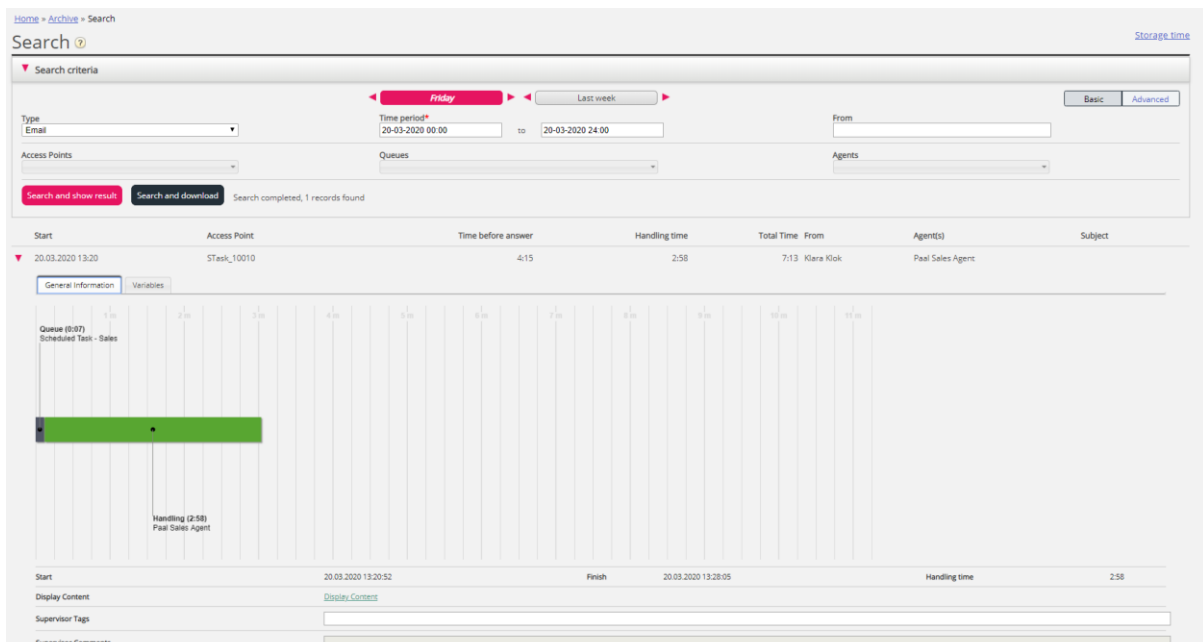
In the General information tab for emails, you will find *Time before answer* and *Handling time*. Handling time is the time the agent has had the email dialog tab open in the agent application.

Below the graph, you'll find a "Display content" link, which is a link to the actual email (etask) stored in your system. This is the link Puzzel received when the email was put in queue. (This link is not used for Scheduled tasks). Please note that if the email/etask is moved to another folder in the source system, the link may no longer be valid.



An email in queue not yet sent to an agent will appear in the Archive, but we only present queue arrival time, since we do not know when it will be sent to an agent and how long time the agent will use to handle it.

Scheduled tasks in Archive



A Scheduled task is shown with type “email”, and with the contact’s name as “From”. The scheduled task will appear with very limited information in Archive some minutes after it’s created (as an email received but not yet answered), and when the scheduled

task is done by agent (hours or days later), the rest of the information about the scheduled task will appear in Archive.

The different input parameters like subject, contact id, phone number, URL will be shown in the **Variables tab**, including changes done on these variables.

Time	Variable Name	Variable Value
06.01.2020 08:24:00	api_etask_created_by	Paal Sales Agent
06.01.2020 08:24:00	api_etask_description	My description
06.01.2020 08:25:00	api_etask_description	My description 2
06.01.2020 08:25:00	api_etask_last_updated_by	Paal Sales Agent
06.01.2020 08:25:00	api_etask_scheduled_datetime_updated	2020-01-06T07:32:00+00:00

9.5 Enquiry Registrations in Archive

In the Agent Application, agents can register what the call/chat/email was about using Enquiry registration. When an agent answers a call/accepts a written request, a new Enquiry registration tab appears (if configured). Since calls can be transferred to other agents and Enquiry registration is optional, there might be 0, 1 or more Enquiry registrations per incoming call, each containing 1 or more Topics in 1 or more Categories and/or a comment. You can search for calls/chats/emails with a Category/Topic or with a specified Comment.

Start	Access Point	Recording Time	Speak Time	Caller's Number	Time before answer	Agent(s)	Select										
03.01.2018 08:24	21496002 (Demo...	0:11	0:11		0:21	Paal agent	▶ □										
<div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; padding-bottom: 5px;"> General Information Recording Enquiry Registration Survey </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Time</th> <th>Agent Name</th> <th>Queue</th> <th>Category</th> <th>Topic</th> </tr> </thead> <tbody> <tr> <td>03.01.2018 08:28:36</td> <td>Paal agent</td> <td>Support</td> <td>Product</td> <td>General</td> </tr> </tbody> </table> <p>Comment: Nothing special</p>								Time	Agent Name	Queue	Category	Topic	03.01.2018 08:28:36	Paal agent	Support	Product	General
Time	Agent Name	Queue	Category	Topic													
03.01.2018 08:28:36	Paal agent	Support	Product	General													

Please note that only Enquiry registrations linked to a request are shown in the Archive.

If you use the Puzzel Dialler and an agent **reschedules** a Dialler call, the reschedule time and “to myself”/”to any agent” will be shown below the Comment. If the Dialler agent selects “Mark as unanswered”, this will also be shown here.

9.6 Survey results in Archive

If your company wants to see SMS Survey or Chat Survey results in the Archive, this can be turned on by Puzzel support. If an SMS Survey or a Chat Survey is offered to the customer, the question, the score and the comment will be shown in a tab called Survey.

Search [?](#)

▼ Search criteria

◀ Yesterday ▶ ▶ Last week ▶ Basic Advanced

Type: Chat Time period*: 06-11-2017 00:00 to 14-01-2018 24:00 Chatter's Name/Email:

Access Points: Queues: Agents:

Speak Time (seconds): 0 to 999999 Recording time (seconds): 0 to 999999 Time before answer (seconds): 0 to 999999

Service Numbers: Country: Supervisor Tags:

Categories: Topics: Answer Status: <All>

Enquiry registration comment: Survey Score: 5 Survey Comment(s):

Hung up First: Variable Name: Variable Value:

Silent Monitored by:

Search Search completed, 8 records found

Start	Access Point	Speak Time	Chatter's Email (id)	Chatter's Name	Time before answer	Agent(s)	Select
▼ 09.11.2017 10:18	Chat_10009_q_ch...	0:30	petter@smart.com	Petter Smart	0:03	Paal agent	<input type="checkbox"/>

General Information Chat Enquiry Registration **Survey**

Time	Question (Message(s) sent)	Score	Comment
09.11.2017 10:19:17	Please help us improve our service by rating this chat.		
09.11.2017 10:19:18		5	

The question will be shown, and if an answer is received, the answer (Score and/or Comment) will be shown. For SMS Survey, the customer usually sends an answer with a score (and/or comment) and then, if a follow-up question is sent, a comment is received (and/or possibly a new score). For Chat Survey, the customer can only answer once, with score and/or comment.

Relevant search fields under Advanced search are:

- **Survey score:** You can enter a number (e.g. 10) or a range (e.g. 0-2)
- **Survey comment:** Enter a text and use * as wildcard, e.g. *bad*

To list all callers/chatters for a day where any Survey comment is received, search for All calls/Chats with Survey Comment = *.

9.7 Related requests / All media types

If a call has a related request, or if an email has a related request, such a request will have a related icon the right margin in the search result table.


▼ Search criteria

Yesterday Last week Basic Advanced

Type: All Calls Time period*: 20-03-2020 00:00 to 26-03-2020 00:00 Caller's Number:

Access Points: Queues: Agents:



Search and show result Search and download Search completed, 5 records found

Start	Access Point	Recording Time	Speak Time	Caller's Number	Time before answer	Agent(s)	Select
▶ 20.03.2020 13:25	21492979 (Main...	0:00	0:00	98214	-		<input type="checkbox"/> 
▶ 24.03.2020 12:45	21492979 (Main...	0:00	0:00	98214	-		
▶ 25.03.2020 12:25	21492979 (Main...	0:00	0:00	98214	-		

If you click on such a related icon, the Archive searches for and shows this request and its related request(s). If the current request and the related has different media types, the Type listbox shows All media types.

ACCESS POINTS: Queues: Agents:

Search and show result Search and download Search completed, 2 records found

Start	Access Point	Recording Time	Speak Time	Request source	Chatter's Name	Time before answer	Agent(s)	Subject	Select
▶ 20.03.2020 13:20	STask_10010		2:58	Klara Klok		7:13	Paal Sales Agent		<input type="checkbox"/> 
▶ 20.03.2020 13:25	21492979 (Main...	0:00	0:00	98214		-			<input type="checkbox"/> 

You can also select Type *All media types* and then search for requests with e.g. one agent and a time period as search parameters, so that you can see all found requests in the same view.

▼ Search criteria

Yesterday Last week Basic Advanced

Type: All media types Time period*: to Request source:

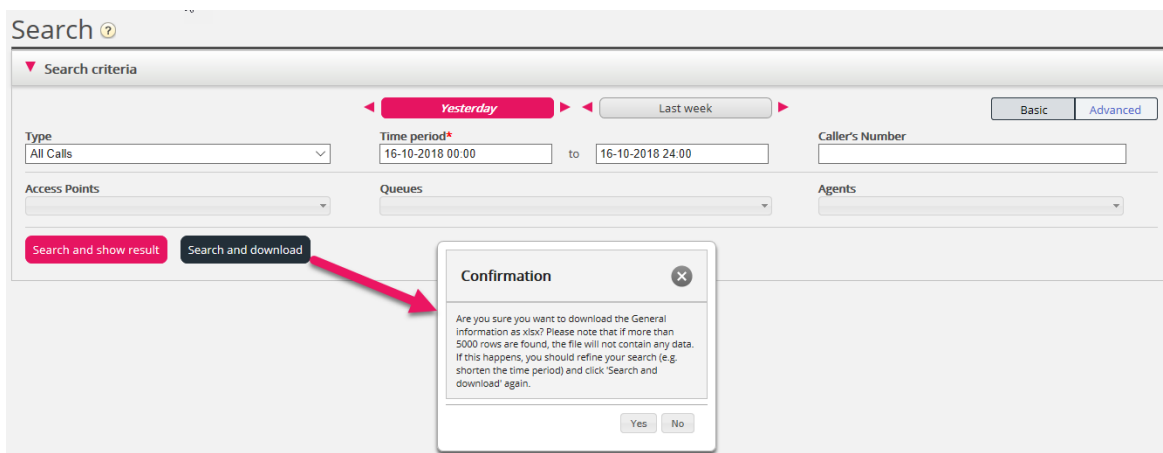
Access Points: Queues: Agents:

Search and show result Search and download

9.8 Download General information about requests

In the Archive, you can search for requests (calls/chats/emails), and you can study the found request's General information and access the request's content, that is, play the call recording or see the chat log. You can also download call recordings (mp3-files) and chat logs from the Archive.

If you want to download the General information for a selection of calls/chats/emails found in the Archive as an Excel file, you can enter your search criteria and click "Search and download". If you confirm in the popup window, the search will be done and an xlsx file will be generated and downloaded.



General information about a request is “metadata” like the Caller’s number/Chatter’s name/email’s From address, Access point, Start time, (system) Queue name, Time in queue, Agent name, Agent speaktime etc.

If you click “*Search and show result*”, we present max 100 requests in your browser even if the search returns more records (“*Search completed. Too many records found, 100 records shown*”). If you click “*Search and download*”, we now allow max 5000 requests/rows in the file. The downloaded file will have file name “Puzzel Archive data yyyy.mm.dd hh_mm_ss.xlsx” If the search returns more than 5000 rows, we will generate a file with no data and filename “Too many rows – please narrow search.xlsx”

There will be one row in the xlsx file per call/chat/email. The columns in the xlsx file:

Column name	Description
StartTime	The date and time the request arrived in the Puzzel platform
ANO	The caller's number, the chatter's id or the email's From address
AddANO	If an additional calling party number is received by Puzzel, it will be shown here.
BNO	The Access number for calls (B-number), the To-address for emails and the Access point for chats.
SessionId	The request's session-id in Puzzel (used in call recording files)
TimeBeforeAnswer	Number of seconds from the request arrived in Puzzel until the first agent answered the call/accepted the written request
TotalSpeaktime	Total number of seconds agents were connected to this request.
Queue	The name of the first system queue this request was in
QueueStartTime	The date and time the request arrived in the first queue
TimeInQueue	How long the request was in the first queue (in seconds)
AgentId	The id for the first agent that answered/accepted the request
AgentName	The name for the first agent that answered the request

Column name	Description
AgentSpeakStart	The date and time the first agent answered/accepted the request
AgentSpeakTime	How long (seconds) the request was connected to the first agent
Queue2	The name of the last queue this request was in
Queue2StartTime	The date and time the request entered the last queue
TimeInQueue2	How long (seconds) the request was in the last queue
Agent2Id	The id for the last agent that answered the request
Agent2Name	The name for the last agent that answered the request
Agent2SpeakStart	The date and time the last agent answered/accepted this request
Agent2SpeakTime	How long (seconds) the request was connected to the last agent
Recordings	For calls: Number of call recordings in this call For chat: 1 if the chatlog exist. For email: The value will usually be 1, but for emails arrived in queue but not yet answered by agents the value will be 0.
EnqReg	0 if no Enquiry registration records exist for this request. 1 if at least one Enquiry registration records exist.
SurveyOffered	0 = Survey not offered. 1 = offered 2 = offered and answer received.

Please note

The Archive's General information is NOT Raw data. The Archive contains quite detailed information about calls/chats/emails, but this is **simplified** information and less detailed than what is found in Raw data. The main differences between Raw data and Archive visualization is explained in the "Puzzel Raw Data detailed description" document on help.puzzel.com

If you want to have more detailed information about calls or if you want detailed information for lots of calls every day/every week, stored in your own system, the recommended solution is to export data from Puzzel Raw data SQL database into your own database.

9.9 Anonymize

On page *Archive – Search* you can search for calls/chats from a person's phone number/email address and then you can download and/or delete the found call

recordings and the chatlogs, but not remove the traces (in General information) that this person called, chatted or sent an email to your Puzzel solution.

On page **Archive - Anonymize**, you can add a row with phone number and/or email address for each end-customer (person) that requires to be forgotten, and then you can select where (SMS Survey and Archive) this person should be anonymized.

Phone number	Email	To Date (including)	Comment	Archive	SMS Survey	Status
<input type="text" value="22222"/>	<input type="text" value="espen@test.com"/>	<input type="text" value="05-06-2018"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Done
<input type="text" value="98214"/>	<input type="text"/>	<input type="text" value="24-05-2018"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Partly done
<input type="text" value="98765"/>	<input type="text" value="username@mail.ser"/>	<input type="text" value="24-05-2018"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Partly done

When a record is entered, Puzzel will (the coming night) replace this phone number in existing calls and this email address in existing chats/emails with 'Anonymized', in the Archive and/or in the SMS Survey result list. A new record will have status *Waiting* until the anonymization is done the coming night, and then its status will be *Done*.

When the actual anonymisation is done, the phone number/email address entered on the Anonymise page will be anonymised (Most digits/characters are replaced ***).

Please note that if a person calls in or initiates a chat to your Puzzel solution after the day you entered his number/email address here, this call/chat will not be anonymized.

Phone number format

- National phone numbers should be entered without country code.
- Foreign phone numbers (numbers not belonging to this Puzzel solution's country) must be entered with 00 and the country code before the national number.

If someone searches for requests in the Archive from a phone number or email address which is anonymized, no requests will be returned.

If a user searches for requests in the Archive and an anonymized call/chat/email appears in the result (e.g. when searching for all requests to queue X yesterday), the anonymized call/chat/email will not include caller's number/chatter's id/email From address, but instead 'anonymized'.

Please note that if you anonymize calls/chats in the Archive, you will not be able to find these requests in the Archive later, so if you really need to delete the call recordings or

chat logs and remove the caller's number/chatter's id (email address) from the request's General information, you must delete the recordings/chat logs first.

9.10 Archive Audit Log

Each time a user listens to, downloads or deletes a call recording, or sees, downloads or deletes a chat log from Archive, a log entry is created to the Audit log. Puzzel does not create a log entry when a user opens the General information tab, the Enquiry registration tab or the Survey tab for a call/chat.

All or selected admin users can be given access to the see the Archive Audit log page, where you find one record for each time a user accessed a call recoding or a chat log.

The screenshot shows the 'Audit log' page in the Puzzel administration portal. At the top, there's a navigation bar with 'puzzel.' logo and menu items: Home, Real-time, Users, Services, Statistics, Catalog, Archive (selected), Widget, SMS. On the right, there are user options: Paal Kongshaug Sign out and Andreas Demo 10010. Below the navigation, there's a breadcrumb trail: Home » Archive » Audit log. The main heading is 'Audit log' with a help icon. A search criteria section includes a dropdown for 'Type' (set to 'All'), a dropdown for 'Action done' (set to 'All'), a 'Time period' section with 'Yesterday' and 'Last week' buttons, and a 'User name' input field. A red 'Search' button is present. Below the search form is a table with the following data:

Type	Action done	Date and time	User's name
Chat	Recording played / Chat log seen	08.03.2017 10:16:45	Yan's Wang'søæ Link to call/chat
Chat	Recording played / Chat log seen	08.03.2017 09:40:30	Paal Kongshaug Link to call/chat

When you search in this log, you can specify *Type* (Recorded calls or Chat), *Action done* (listen/download/delete), *User* that accessed the content and/or *Time period*.

When an “old” call's/chat's general information is deleted from the Archive at midnight (according to the agreed storage time), the Audit log entries for the deleted calls/chats (if any) are also deleted.

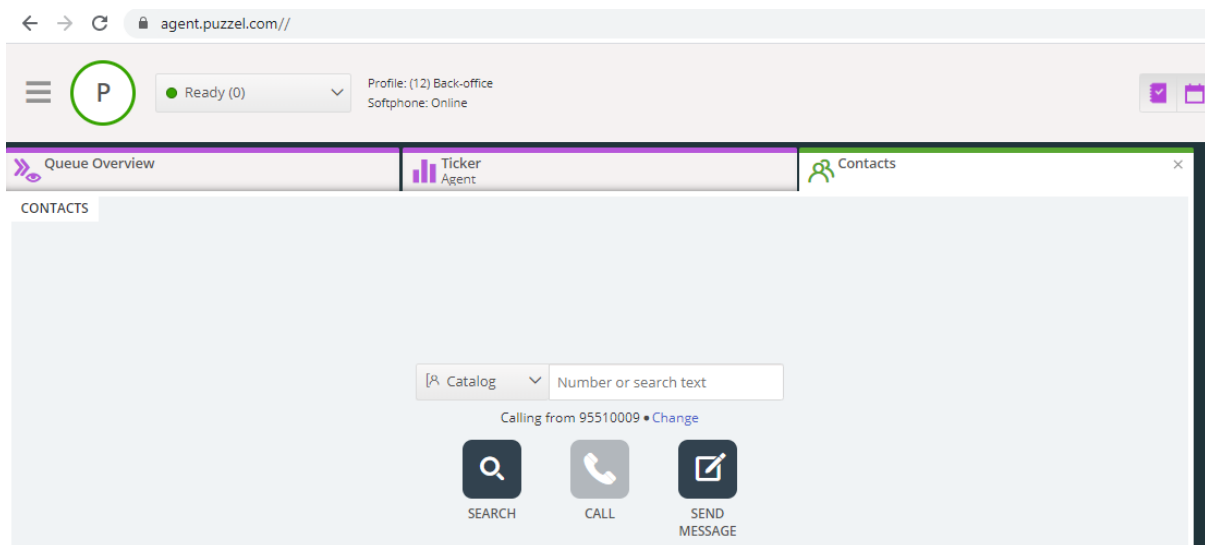
Puzzel support can't listen to your call recordings nor see your chat logs in the Archive unless you have given Puzzel access to the Archive content. It might be useful for Puzzel to have access to recording files when working with support issues related to call/sound quality or call recordings. If Puzzel is given access to Archive content and a Puzzel employee listens to a call recording or looks at a chat log, this will be logged in the Archive Audit log (if logging is turned on).

10 Catalog

10.1 Catalog Overview

In the Catalog tab in the Administration Portal you can manage your organisation's manually added or imported contacts and departments, and you can associate contacts with departments.

The contacts in the Catalog are searchable in the Agent application's Contacts tab:



There are 3 ways to add contacts in your organisation's catalog:

- **Manually** add and edit contacts in the catalog through the Administration Portal.
- Import a **file** with a list containing your contacts by uploading it to Puzzel's FTP server.
- Import contacts through a **sync client** installed in your Exchange or similar environment.

In addition to contact information, the contact's calendar appointments can be imported through the same sync client as the contacts. As with contacts, appointments can also be added manually.

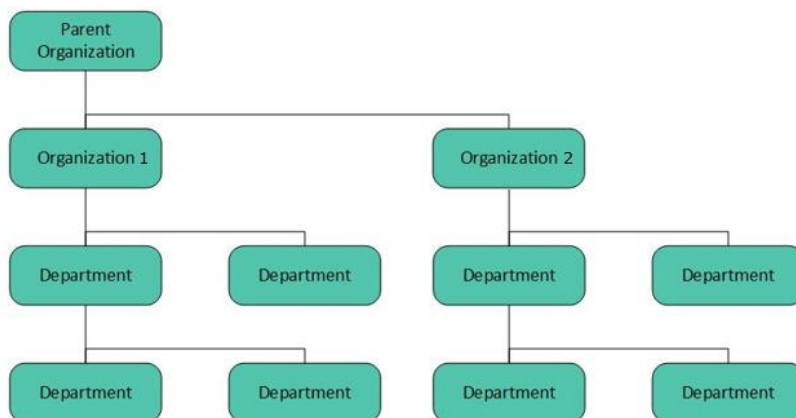
The contact detail fields used in your catalog is determined when support sets it up.

The catalog is built up with a hierarchy system of organisational units. There are 3 basic levels within the hierarchy: Parent organisation, Organisation and Department.

- **Parent organisation:** A parent organisation is the top level of the hierarchy, and contains one or more organisations. More than one organisation is relevant for contact centres that need to manage contacts from more than one organisation.

In most cases, the Parent Organisation will just have a single Organisation beneath it.

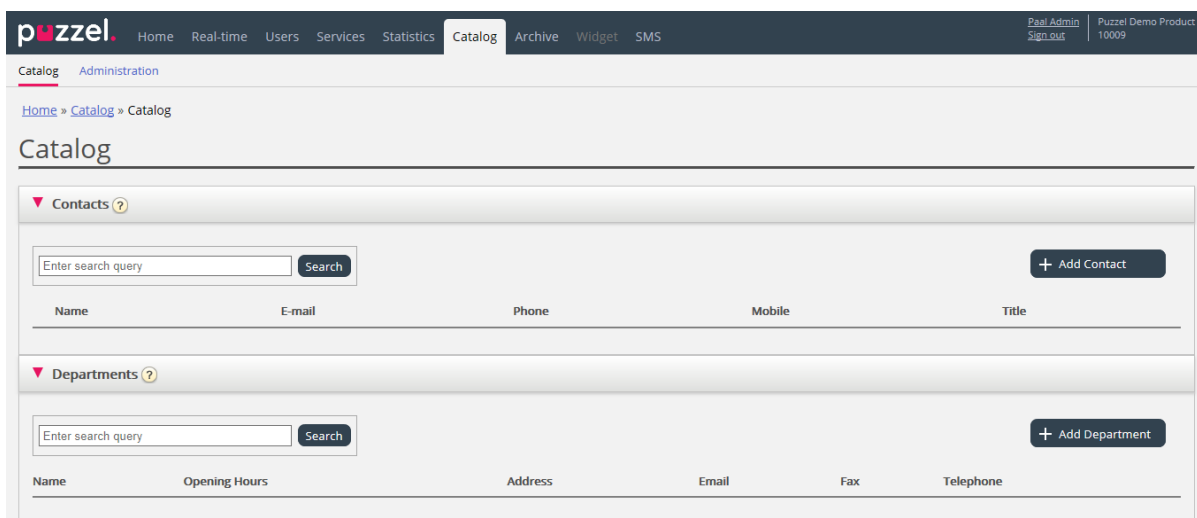
- **Organisation:** The organisation in the catalog typically contains all contacts and departments in your company. An organisation usually contains more than one department. For some customers there are more than one organisation, but usually there is only one.
- **Departments:** Departments are used to group contacts and generally represent an actual department in the organisational hierarchy. A department can have several sub-departments, and these can in turn have additional sub-departments. Basically, you can have as many department-levels as you want in the hierarchy.



A Puzzel technician must first create the *Parent organisation* and *Organisation* when setting up your catalog. With sufficient access rights, you can create the underlying departments and sub-departments, and which contacts that belong where.

10.2 Catalog

Under *Catalog – Catalog* there are two accordions: Contacts and Departments.

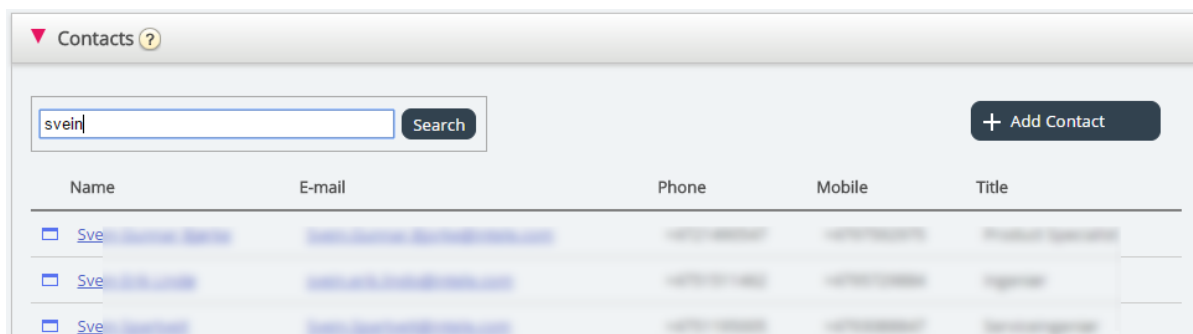


10.2.1 Contacts

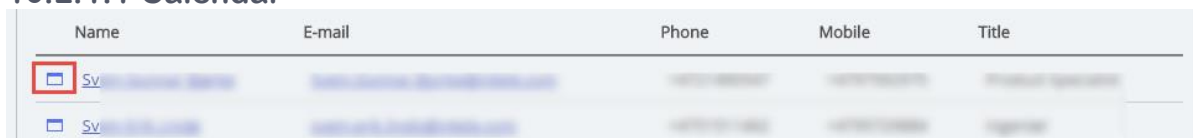
Under Contacts you can search for your company's contacts. You can search for match in all contact fields, e.g. name, e-mail address, phone, title, description and services, and you can search with multiple words separated with space. A search returns rows that begin with your entered text.

If you have access to more than one Organisation, you will see a dropdown list box where you can choose which organisation to search in. From the search result you can access a contact's details and calendar. With sufficient access, you can edit some of these details.

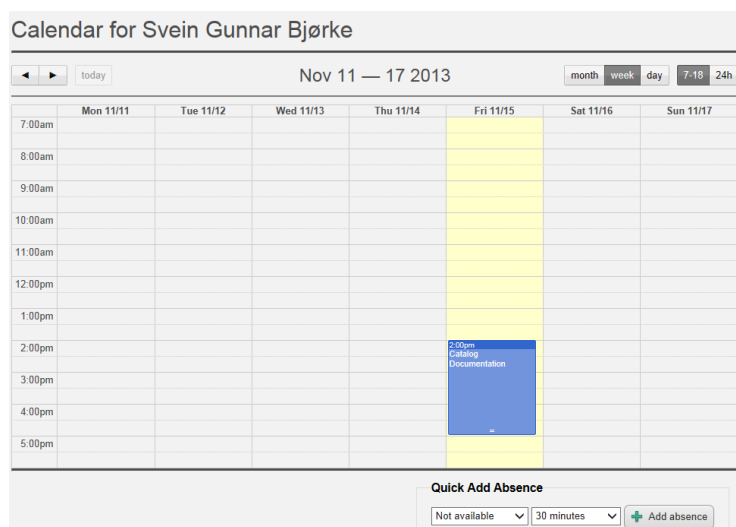
Maximum 500 contacts are listed in a search result.



10.2.1.1 Calendar



If you click on the calendar icon next to a contact name, the contact's calendar will appear.



You can change the view of the calendar (month, week, day or 7-18, 24h) by using the buttons in the upper right corner.

If you click on an appointment in the calendar, the appointment details will be shown. If you have sufficient access, you can Delete an appointment (an event).

10.2.1.2 Adding an appointment

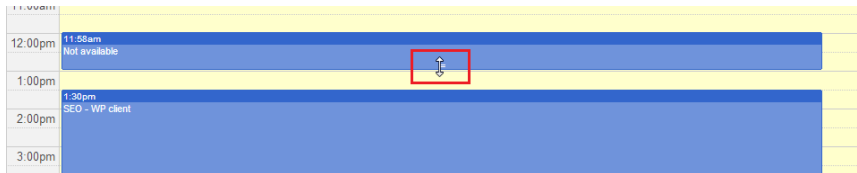
If you have sufficient rights, you can add an appointment to a contact's calendar by clicking on an empty slot inside the calendar. A new window will pop up, and here you can fill in the details, and then click Add event.

10.2.1.3 Quick Add Absence

To quickly add an absence/appointment, simply click the “Add absence” button in the calendar. This will create an appointment starting immediately with 30 minute duration.

You can of course change the reason (Not available/Meeting/Lunch/Gone for the day) and/or the duration before you click Add absence.

To make the appointment last longer than 30 minutes you can drag it by using the arrow in the middle of the appointment.



10.2.1.4 Modifying the calendar and sync with email/calendar systems.

Please note that the Puzzel calendar does not sync back to the source email/calendar system. If you add/delete an appointment in the catalog, these changes will not take effect in the source system. If you delete an appointment in the catalog and then a full sync with the source system is done, the appointment will re-appear in the calendar in the catalog. If you have sync with an email/calendar system, we recommend that you edit appointments in the source system.

10.2.1.5 Contact Details and Edit Contact

Name	E-mail	Phone	Mobile	Title
<input type="checkbox"/> Svein Gunnar Bjørke	svein.gunnar.bjorke@intelcom.no	+47214 10001	+47975 10001	Product Specialist
<input type="checkbox"/> Svein Gunnar Bjørke	svein.gunnar.bjorke@intelcom.no	+47214 10001	+47975 10001	Product Specialist

Under accordion Contacts, click on a contact name in the search result to see detailed information about the contact.

[Home Page](#) > [Catalog](#) > [Catalog](#) > Svein Gunnar Bjørke

Contact Details – Svein Gunnar Bjørke

First Name	Svein Gunnar
Last Name	Bjørke
Title	Product Specialist
Description	Intelcom Group AS Oslo
Phone Number	+47214 10001
Mobile Phone	+47975 10001
Fax	
E-mail	Svein.Gunnar.Bjorke@intelcom.no
Department	10001 » 10001 Intelcom NO » 517 - CCO: Product
Alternative Contact	
Services	Salesforce, Dynamics, Zendesk
External contact	No
Contact Source	File
Created	
Modified	28.04.2017 07:04:41

[Edit Contact](#)

Click on Edit Contact in Contact Details to edit the contact’s information (only possible with sufficient rights).

Home Page » Catalog » Catalog » Svein Gunnar Bjørke » Edit Contact

Edit Contact – Svein Gunnar Bjørke

First Name	Svein Gunnar
Last Name	Bjørke
Title	Product Specialist
Description	Intelecom Group AS Oslo
Phone Number	+4721 [redacted]
Mobile Phone	+4797 [redacted]
Fax	
E-mail	Svein.Gunnar.Bjorke@intele.com
Department	10001 » 10001 Intelecom NO » 517 - CCO: Product
Alternative Contact	Enter search query
Services	Salesforce, Dynamics, Zendesk
External contact	<input type="checkbox"/>
Contact Source	File
Created	
Modified	28.04.2017 07:04:41

Some organisations export their contacts from Active Directory or another source with a set of fields that they want to synchronise. By setting some fields with “web” as source, some flexibility is added since this allows Catalog administrators to edit these fields in Puzzel.

10.2.1.6 Add a contact

You can add a new contact by clicking the Add contact button.

▼ Contacts ?

Enter search query

Name	E-mail	Phone	Mobile	Title
------	--------	-------	--------	-------

Fill in the new contact’s information on the Add contact page and click Save changes.

After the contact has been added, it will behave as any other contact in the catalog with the same restrictions as previously created contacts.

10.2.2 Departments

Under accordion Departments you can search for existing departments in your catalog.

Home Page » Catalog » Catalog

Catalog

▶ Contacts ?

▼ Departments ?

oper

Name	Opening Hours	Address	Email	Fax	Telephone
519 - CCO: IT Operations					
UK: Operations					

You can search for match in all department fields (Name, Description, Manager and Services). If you have access to more than one Organisation, you can choose organisation in a dropdown list.

10.2.2.1 Department details

Click on a department name (in the Department search result) to see details for the department.

Home Page » Catalog » Catalog » 519 - CCO: IT Operations

Department Details – 519 - CCO: IT Operations

Name	519 - CCO: IT Operations
Description	
Under	10001 » 10001 Intelcom NO » 519 - CCO: IT Operations
Reception	
Manager	
Opening Hours	
Telephone Hours	
Services	
Invoice Node	450 iLo
Contacts	Show contacts in this department Export a list of all contacts in this department
	Edit department

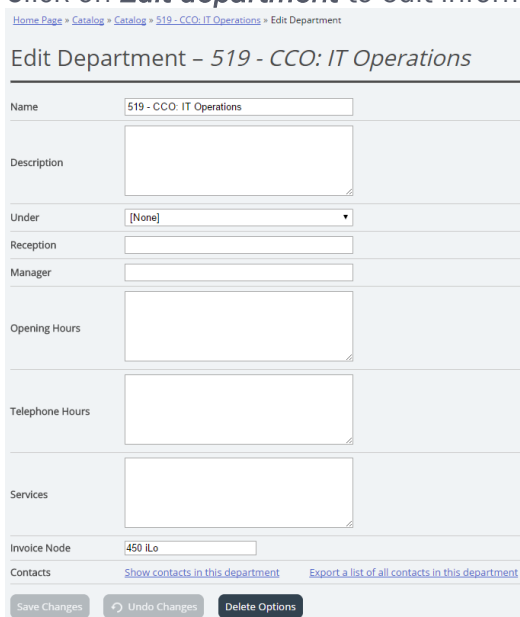
From the Department Details page you can:

1. Click on **Show contacts in department** to see all contacts registered.



In this List of contacts you can click on a contact’s calendar icon to see the contact’s calendar, or click on the contact’s name to see the contact’s details. If you want to export a selection of the contacts, select the relevant contacts and click Export a list of contacts.

2. Click on **Export all contacts** in department.
3. Click on **Edit department** to edit information about the department.



Only Name is required for a Department. If this department should be a sub-department under another department, please select which department this department should be *Under*.

10.2.2.2 Export contacts

If you want to export all contacts in a department, click *Export a list of all contacts in this department* on the Department Details page.

If you want to export a selection of contacts within the chosen department, click *Show contacts in this department*, and then tick the checkbox next to the contacts you want to export from the list, and then click *Export a list of contacts*.

In the Export details window you can choose the format of your export (Excel or CSV) and which fields that should appear in the exported list.

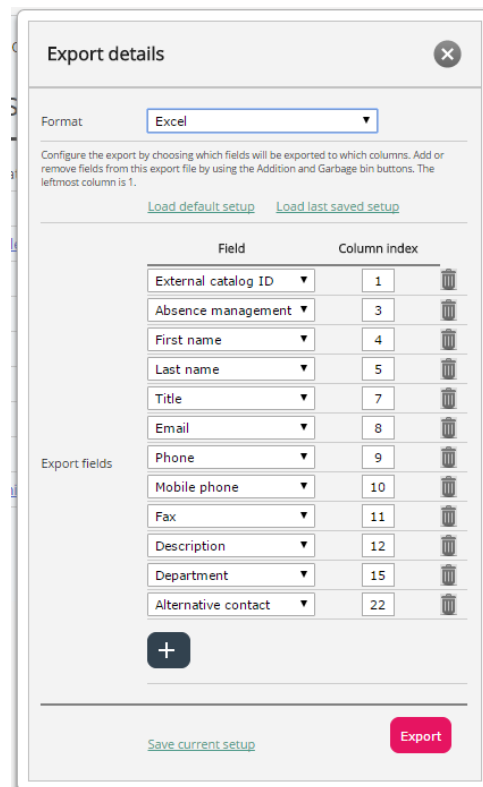
Your solution's default export fields are shown in the Field column, but you can also load the last saved field setup (from one of your previous exports) if you prefer that. You can add a field to the export by clicking the + button at the bottom of the window, and you can delete one by clicking on the garbage bin icon.

Please note that the default fields vary depending on how your catalog is configured.

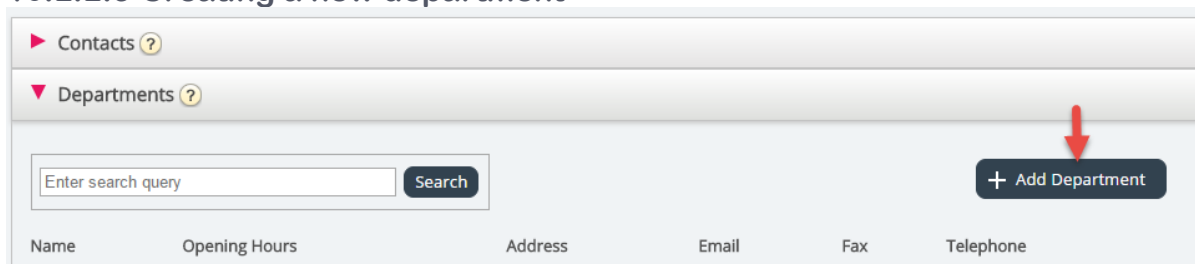
In the Column Index column, you can configure in which order the fields should appear in the export. The value for the first column to appear is 1.

If you for want a space between columns, you can do so by skipping a column index number. In this example we have not defined a column index 6 for any field. This means that in your exported list there will be an empty column after the 5th column.

You can at any time store your current export setup in order to load it again at a later time. In this way you will next time have the choice to export with your solution's default setup or the setup you last saved.



10.2.2.3 Creating a new department



Click the *Add Department* button under accordion Departments to add a new department.

The only mandatory field is Name.

If your catalog has more than one Organisation, you can choose Organisation in the Under field.

If you want to make this new Department a sub-department, you have to configure this afterwards by editing the department.

Home Page » Catalog » Catalog » Add department

Add department

Name

Description

Under »

Opening Hours

Telephone Hours

Services

Invoice Node

10.3 Administration

Under *Catalog - Administration* there are several accordions. Not all customers can see all accordions.

puzzel. Home Real-time Users Services Statistics **Catalog** Archive Widget SMS Paal Admin Sign out Puzzel Demo Product 10009

Catalog Administration

Home » Catalog » Administration

Administration

- ▶ Unconfirmed Departments ?
- ▶ Department Association ?
- ▶ Call Management ?
- ▶ Logs ?
- ▶ Alert Configuration ?

10.3.1 Unconfirmed Departments

If the department field is synced/imported automatically, you as an administrator need to confirm them for the departments to belong to the catalog and be added to the

hierarchy. These departments will automatically contain the contacts that have a specific synced department in their department field.

Unconfirmed Departments ?

Choose department

10001 (Parent Organization)

» 10001 Intelcom NO (Organization)

Unconfirmed Departments

Name	Confirm	Merge Into	Add Under
Intelcom Danmark AS	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

[Show Contacts](#)

You have 3 options when deciding what to do with a department:

- **Confirm:** Check this box to add the department to the hierarchy.
- **Merge into:** It is possible to merge a synced department with an existing department in the Catalog. The original department will then be shown and will contain the contacts of both departments.
- **Add Under:** Here it is possible to select which organisation or department to add the current department under. This allows an organisational hierarchy of synced departments.

10.3.2 Department Association

Department association allows you to manage what departments users belong to. You can move users between departments and associate users that don't belong to a specific department to a department.

Unconfirmed Departments ?

Department Association ?

Choose department

10001 (Parent Organization)

» 10001 Intelcom NO (Organization)

» 410 - Operational Support (Department)

After choosing the relevant department, a list of contacts will appear divided into two different lists/tables.

- *The first is a list of users that do not have any department association*
- *The second list will contain users that belong to the chosen department.*

Department Association ?

Choose department

10001 (Parent Organization)
 » 10001 Intelecom NO (Organization)
 » 410 - Operational Support (Department)

Users without department association

Name	Email	Title	Move
Eni Andersen	eni.andersen@tele.no	Deftingssek	<input type="checkbox"/>
Stig Steing		Konsulent	<input type="checkbox"/>

Users in Department "410 - Operational Support"

Name	Email	Title	Move
Andreia Valle	andreia.valle@tele.no	Product Specialist Contact	<input type="checkbox"/>
Jo Swens Linder	j.linder@tele.no	COO	<input type="checkbox"/>
Sigrid Samvold	sigrid.samvold@tele.no	Product Specialist Contact	<input type="checkbox"/>

Save Changes Undo Changes

To move users into a department, choose users from the first table (Users without department association) and then check the Move checkbox, and then click *Save changes*. The users will now belong to the chosen department.

If you want to move a user from today's department to new department, check the Move checkbox and click Save Changes. Now this user will not belong to any department, and the user will appear in the first table, so that you can move the user to correct department.

10.3.3 Call Management

Under Call Management you can enable and disable the Absence management feature for individual contacts. Absence management is mostly used in switchboard solutions where direct calls to contacts, usually employees, are forwarded to the Puzzel solution if not answered, so that the caller can hear 'spoken absence information' for the contact if available.

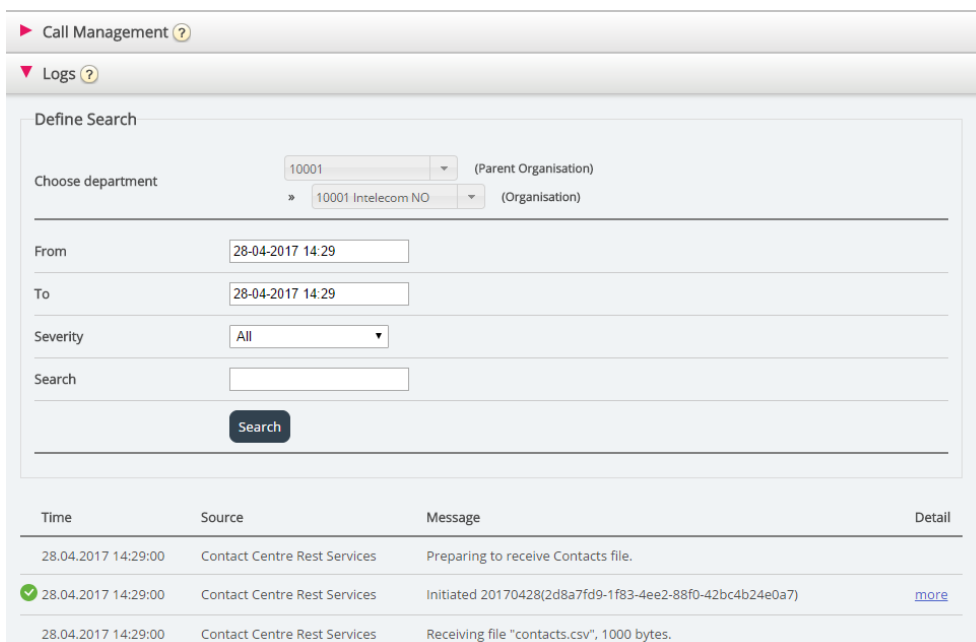


After choosing Organisation, mark the contacts you would like to activate spoken absence for.

Please note that this feature requires a separate setup in Puzzel and in the local PABX.

10.3.4 Logs

Here you can search for changes and alerts for the chosen organisation. Choose a timespan, the severity (Info, Change, Warning, Error or All) and some text and click Search.



10.3.5 Alert Configuration

In Alert configuration it is possible to add alerts for contacts and appointments. These alerts are triggered based on when contacts and appointments were last updated. This is useful for administrators that want to be notified if sync of contacts or appointments stops working.

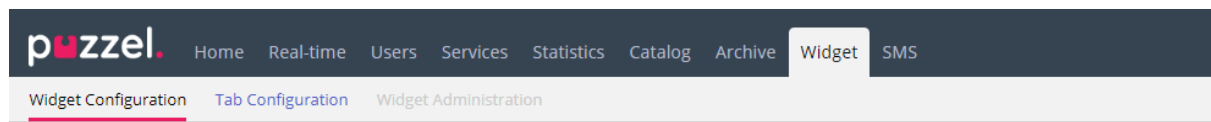
▼ Alert Configuration ?

Alert Name	Source	Organisation	Email	Time Setting	Interval	Threshold
<input type="text" value="Alarm 1"/>	<input type="text" value="Catalog"/>	10001 Intelcom NO	<input type="text" value="alamrecipient@mail.com"/>	<input type="text" value="08:00-16:00"/>	<input type="text" value="1 hour"/>	<input type="text" value="1 hour"/>

+ Add Alert Save Changes Undo Changes

- **Alert Name:** Name of the alert.
- **Source:** Catalog or Calendar.
- **Organisation:** The hierarchy must be considered since all departments beneath this organisation will be included and as a consequence trigger an alarm.
- **Email:** Email address that will receive the alert.
- **Time Setting (Recipient time):** “Opening hours” for the alert. Alerts will only be sent within these days/hours.
- **Interval:** How often the alert will be sent once it has been triggered. The system will continue to send alerts until synch is sending data again.
- **Threshold:** How old the configured data must be before the system starts sending alerts.

11 Widget



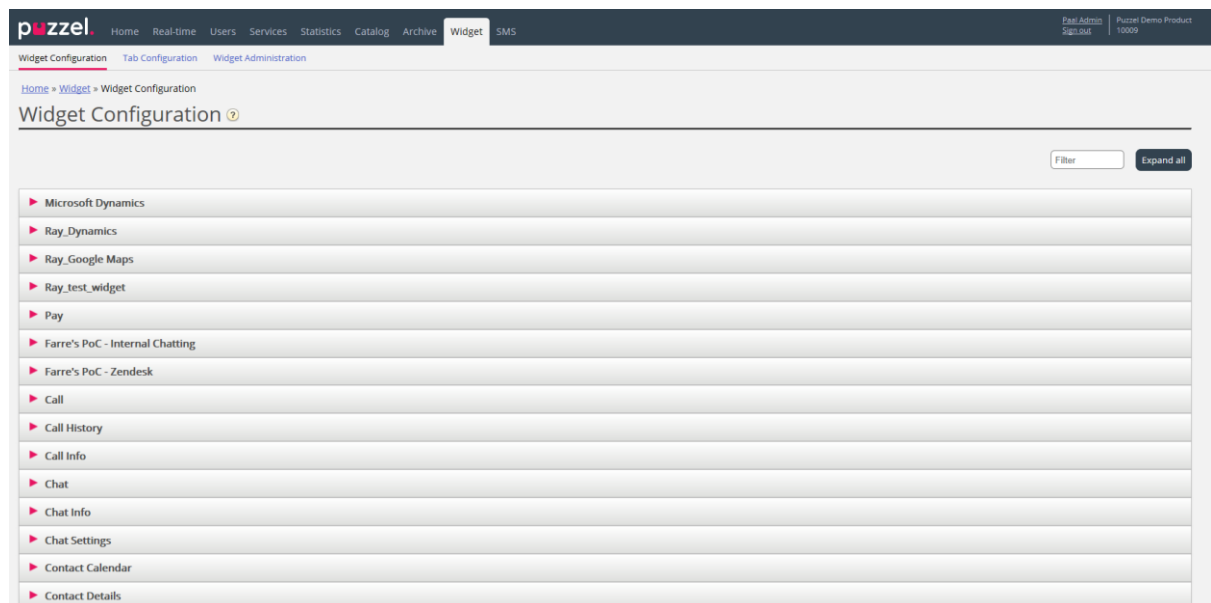
The Widget page provides an overview and configuration options for **Tabs** and **Widgets** to be used in the new Agent application (<https://agent.puzzel.com>). A detailed user guide for the Widget page in the Admin portal and the Widget API can be found in separate articles on help.puzzel.com:

<https://help.puzzel.com/hc/en-us/articles/115005429209-Widget>

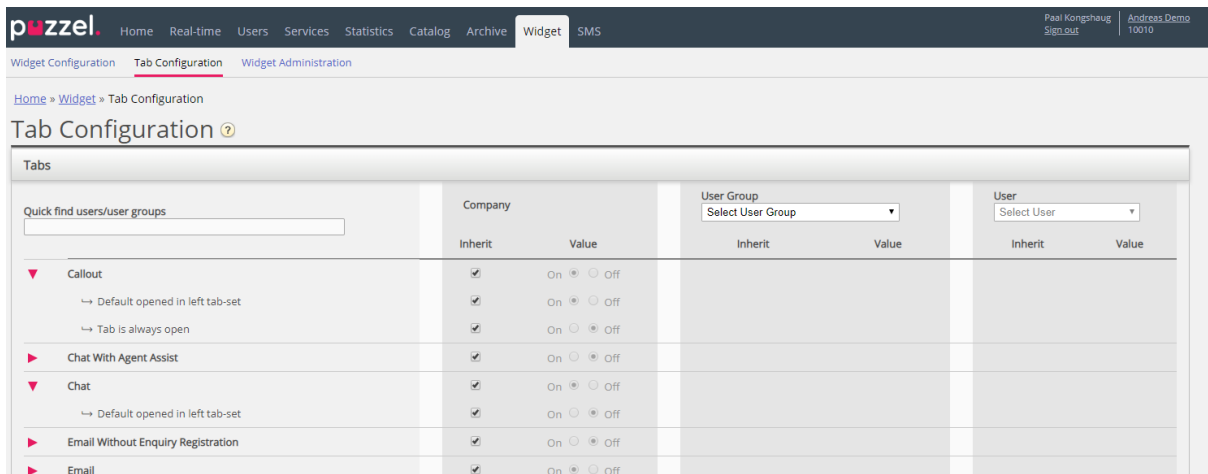
<https://help.puzzel.com/hc/en-us/articles/360000504917-Widget-API>

Here is the short version:

On page *Widgets – Widget configuration* you can see the widgets used in your Puzzel solution, and some of the Widgets have parameters that can be adjusted here.



On page *Widget – Tab configuration* it is defined what tabs that should be available in agent.puzzel.com for the different user groups.



To make it easier to have a “fixed” layout of agent.puzzel.com, the properties per tab can be adjusted.

- **Tab is always open:**
Function tabs (e.g. Queue overview) can be defined to be always open (agents can't close them). This property is by default set to "off".
- **Default opened in left tab-set:**
Both function tabs and request tabs (Call/chat/social/email) can be set to be opened in the left tab-set as default. Function tabs will have this property set to "on" as default.

12 SMS

12.1 SMS Survey

For customers with Puzzel SMS Survey we have a separate (old) admin page (<https://interactive.intele.com>) where the *question/reply/thank you* messages are defined, the deny list is maintained and where the results are shown. The same functionality is available in the Puzzel Admin Portal on page *SMS – SMS Survey*.

Name	Id	Active
Product Demo Survey NO	2604	Yes

Click on a Survey (you might have several) to open the details page.

On this page, the SMS Survey can be enabled/disabled, and you can define a quarantine time (minimum days between each time we send an SMS Survey to a mobile number, in case the caller calls the Puzzel customer several times during a week.)

SMS Survey vs SMS Web Survey

- A standard **SMS Survey** sends an SMS to the end-customer (after call end), and the end-customer answers by sending an SMS with a score. Sometimes a follow-up question is sent by SMS, and the end-customer may answer this SMS (a comment).
- In an **SMS Web Survey**, Puzzel sends an SMS to the end-customer (after call end), and this SMS contains a link to a mobile web-page. The end-customer clicks on the link to go to the web-page, and here the end-customer selects a score and optionally writes a comment. After having answered, a new message is shown on the web-page.

12.1.1 Result

All results from the Survey are found in the result accordion. The list is searchable by date, agent, queue name and score. If you have defined several user groups, this is also specified (“Team”). Instead of having the results from a Survey shown only on screen, it is possible to download the results directly to a xlsx file.

The screenshot shows a web interface for viewing survey results. At the top, there is a 'Result' header with a help icon. Below it are search filters: 'Time period*' (04-01-2018 00:00 to 04-01-2019 24:00), 'Queues' (None), 'Agents' (None), and 'Scores' (None). There are 'Search' and 'Search and download' buttons. The main area is a table with the following columns: Date, Phonenumber, Agent, Queue, Team, Score, Comment, Follow up answer, ventetid, samtaletid, lastCall, parameter4, parameter5, and Address. The table contains 10 rows of data, with the first row being: 14.08.2018 11:15:58 +479, followed by 9 rows of similar data. At the bottom, there is a 'Go to page' input field, a pagination link '1 2 3 4 5 6 7 > >|', and a 'Records per page' dropdown set to 10.

The score is added to the Score column. For replies where the caller has written something else or something in addition to a score, this is added to the column Comment. If a follow-up message is sent and the caller replies to this message, this will appear in the column Follow-up answer.

Each night Puzzel anonymizes the phone number for records that are more than 4 months old.

The (aggregated) SMS Survey results are also available in Wallboard (Avg, Survey score per queue so far today), Ticker (Avg. score per queue/user group and agent so far), Archive (score and comment per caller), Statistics (SMS/Chat Survey score per queue) and in Raw data.

12.1.2 Messages

For standard SMS Survey:

The screenshot shows a configuration interface for messages. It has a 'Messages' section with two columns of text input fields. The left column is for the 'Start message' (13 characters, 1 message) and the right column is for the 'Reply/Thank you message' (17 characters, 1 message). A 'Save Changes' button is located below the fields. Below the messages section are links for 'Follow-up messages' and 'Deny list'.

- **Start/Survey message:** This is the first SMS the caller receives. The message should contain a question and the allowed score range. Max 960 characters.
Example: *“On a scale from 0 to 10, how likely is it that you would recommend our company to others?”*
- **Thank you/Reply message:** This is the message Puzzel sends to the caller after having received the caller’s answer to the Survey message. Max 960 characters.

For SMS Web Survey there are some extra messages to be defined (which will be shown on the mobile web-page):

The screenshot shows a configuration interface for Web Survey messages. It has a 'Messages' section with two columns of text input fields. The left column contains: 'Start Survey message' (21 characters, 1 message), 'Question Web survey' (18 characters), 'Company signature Web survey' (28 characters), and 'Common follow-up message Web survey' (28 characters). The right column contains: 'Reply/thank you message' (23 characters), 'Welcome message Web survey' (26 characters), and 'Survey already completed' (24 characters). A 'Save Changes' button is located below the fields. Below the messages section are links for 'Follow-up messages' and 'Deny list'.

- **Question:** Here you ask the user to enter his score for what you want to measure.
Example: On a 0-10 scale, how likely is it that you would recommend our company to others?
- **Welcome message:** Welcome message after entering the mobile web page.
Example: Thank you for helping us improve!
- **Company Signature:** Here you enter a signature for the company that appears on the mobile web page after completion of a survey. Example: Contact us by telephone xxxxx or by e-mail support@company.com if you have questions.

- **Survey already completed:** Message displayed on the mobile web page if user clicks the link in the SMS message after the survey has already been completed
- **Common follow-up message:** To be shown on the mobile web page where you ask the End-user follow up questions. Individual follow-up messages can be created for each score, or you can define a Common follow-up message that will be shown independent of the score given by the end-user.

12.1.3 Follow-up Messages

Score	Follow-up messages	Activate message	Send mail	Send notice by URL
1	Characters: 29 Follow-up message for score 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	Characters: 0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Characters: 0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Characters: 0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Characters: 0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Characters: 29 Follow-up message for score 6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Changes

The administrator can choose to enable a follow-up message for one or more scores. If the follow-up message is enabled for a score, the follow-up message will be sent to the caller before the Thank you/Reply message.

- If you check *Activate message* for a score, the follow up message will be sent to callers sending this score.
- If you check *Send email* for a score, an email will be sent to the predefined email address for each time this score is received.
- If you check *Send notice by URL* for a score, a URL with given parameters is triggered for each time a caller gives this score. Example: Callback to user is automatically ordered at score 0 or 1.

It is also possible to configure a Common follow-up message for SMS Web Survey. This is done under accordion Messages.

12.1.4 Deny list

Enter a user's mobile phone number and add it to the deny list. Users in the deny list will not receive SMS from this Survey. You can also enter a short comment describing the background for why the user was added to the list.

End-customers that reply "NOSURVEY" or "-1" will also be put in the deny list.

12.1.5 SMS (Web) Survey "Unsubscribe"

SMS Survey and SMS Web survey has functionality that allows end-users to "unsubscribe". The end-customer has of course not subscribed to SMS Survey, so unsubscribe here means "stop receiving SMS from this Survey". If an end-user unsubscribes, her mobile number is put into the service's existing deny list.

SMS Survey uses the generic SMS Keyword NOSURVEY and score -1 to unsubscribe. If you want to inform about the SMS Survey unsubscribe option, you must write about it in the SMS Survey message itself, e.g. "Please tell us how you experienced our customer service by answering with a number between 1 and 6, where 6 is the best. If you don't want to receive SMS Survey after calling us in the future, please send answer NOSURVEY or -1"

After choosing to unsubscribe, the end-user receives a SMS receipt confirming that the unsubscribe was successful.

SMS Web Survey has a new red button where end-users can choose to unsubscribe. Instead of rating, the end-user simply presses the 'Stop Survey button. Clicking the button takes the End-user to a new page that confirms that the unsubscribe was successful.