Puzzel Administration Portal

Puzzel is a flexible customer contact and switchboard solution based on cloud technology. It 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
- 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

> Note
>
> In this section, most of the available functionality in Puzzel Administration Portal is described. Your company has 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] section.

Puzzel Administration Portals main features are available on tablets, for example iPads.

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

For full version of the User guide in all languages, please download here:

puzzel_admin_portal_-_user_guide_-_2020-10-06.pdf

puzzel_admin_portal_-_user_guide_-_2018-10-31_no.pdf

puzzel_admin_portal_-_user_guide_-_2018-10-31_sv.pdf

puzzel_admin_portal_-_user_guide_-_2018-11-14_da.pdf

GDPR and the Administration Portal

The General Data Protection Regulation (GDPR) imposes additional requirements for companies that collect or store personal data of EU residents. This, obviously, includes Puzzel. We understand the importance of your personal data, and we take steps to secure and protect it whenever it is stored in our platform in accordance with our ISO27001 certified Information Security Management System. For more general information about what Puzzel is doing in relation to the new GDPR requirements, we refer you to our Trust Centre.

There is also a blog post on the same topic here.

In this article and sub articles, we will go over some practical issues relevant to contact centre managers and supervisors as they work with our Administration Portal.

- Personal information in Puzzel
- Archive
- SMS Survey
- Historical statistics
- Real-time information
- Login and password
- Logs and access control
- Information about agents (users)
- Anonymize an agent?
- Archive API

Personal information in Puzzel

The main types of *personal information* stored in Puzzel's platform are:

- Information about the end-customer in each **request** (call/chat/email) stored in the **Archive**
- Information about the Puzzel **users**
- Historical **statistics** per agent user (number of calls, speaktime, wrap-up time etc per agent)
- **Real-time statistics** per agent (number of calls, speaktime, wrap-up time etc per agent
- Information about Surveys (caller's number/chatter's ID, agent ID, score and comment)

Archive

The main information per request stored in the Puzzel Administration Portal's Archive:

Media type	General information	Content	Survey
Phone	Caller's number, agent name, wait time, speaktime...	Call recording (1)	X
Chat	Chatter's name and email, agent name, wait time, speaktime...	Chat log (1)	X
Email	From-address, subject, agent name, wait time, speaktime...	- (2) *(Body/attachment not sent to Puzzel)*	
E-task	From-address, subject, agent name, wait time, speaktime...	- (2)	

1. The call recordings and chat logs *may* contain sensitive information
2. **E-mails/e-tasks** are not stored in Puzzel, only the From-address and the URL to the email/e-task that is queued

Social media content from Facebook/Twitter is not available in Puzzel Admin Archive.

About Survey data in Archive

The Survey data for a request (SMS Survey for calls, and chat survey for chats) contains a **score** (0-10) and a **comment** and the associated request's sessionId (the caller's phone number, or the chatter's name/email is shown in the General information part).

Caller's consent needed to record calls

Call recordings can be done automatically on one or more queues and/or on some or all agents ("*forced* recording"). If forced recording is configured, the Puzzel IVR solution should inform the caller and get approval for doing the recording (e.g. by pressing 1). If the caller does not accept recording or denies recording, the call will not be recorded (the system variable "deny_recording" is set to *true*).

If forced recording is not configured, agents can be given access to start recording (and stop it) for individual calls. In this case, the agent should not start recording unless the caller is informed and accepts it.

Chatter's consent to store chat-log

The Puzzel customer can in the chat start page/window show "I do not accept that this chat is stored" next to a checkbox. If the end customer checks "I do not accept...", the chat log will not be stored in the Archive (and the chatter is not offered to receive the chat log by email after chat end), but the general information about the chat will be stored in Archive (and in the Raw data).

Archive storage time

Each Puzzel customer decides the storage time in their own Archive for general information about requests (e.g. 180 days), call recordings (e.g. 14 days), and chat logs (e.g. 30 days). Puzzel automatically deletes general information/recordings/chat logs each night that are older than the defined storage time.

Find, see, export and delete content from Archive

In the Archive, the admin can search for requests based on the caller's phone number, chatter's name/email and/or other search parameters like time, queue, agent, etc.

In the Archive, the Puzzel admin can...

- See **General information** about each request
- Play (listen to) a call recording
- See the chat log
- Download a call recording as an MP3 file

- Download a chat log as an XML file (or copy the text to the clipboard)
- Delete a call recording (but not the general information about the call)
- Delete a chat log (but not the general info about the chat)
- Download general information about calls (th an XLSX file)

The administration can e.g. search for calls from a given number (for the last 3 months if general information is stored at least 3 months), and then select all (or some of the) found calls, and then select Download recordings and/or Deleted recordings.

When the content (recording/chat log) for a request is deleted, the request's will still be shown, that is, the time the call/chat happened, the caller's number/chatter's name and email, queue name, wait time, agent name, and speaktime.

Archive Audit log

Audit logging is from June 20th 2018 by default turned on.Each time a user plays/downloads/deletes a call recording or sees/downloads/deletes a chat log in the Archive, an Audit log entry is generated.

If Puzzel support is given access to the content related to a support issue (e.g. call quality or recording), it is logged each time Puzzel support accesses content.

All or selected administrators can be given access to see the Archive Audit log in the Administration Portal.

All entries in the Archive Audit log (e.g. user X listened to recording for request Y at yyy.mm.dd hh:mm) are deleted when the associated request's general information is deleted.

Mask digits from IVR

If the Puzzel IVR solution tells the caller to enter personal information, like e.g. a social security number, to be used for external look-ups and/or routing/agent screenpop, this menu module should be configured with "mask digits", which means that the entered digits will not be stored in raw data to prevent it from being shown in Archive and in Raw data.

Anonymization (deleting the caller's number/chatter's ID in Archive)

If an end-customer wants to be "forgotten", the Puzzel admin can **anonymize** all requests (calls/chats/emails) in Puzzel Archive and in SMS Survey results lists from this person by entering the person's phone number and email address on the Anonymize page.

The administrator can delete call recordings and chatlogs **and/or** anonymize the calls/chats/emails from a person. If the admin only anonymizes requests from a person, the call recordings/chat logs will be kept. Since this person's calls/chats now are without a phone number/chat ID, you can not find them when you search. If an anonymized call (with or without a recording) appears in the Archive search result, you do not see the caller's number.

SMS Survey

A Puzzel customer can turn on (and off) SMS Survey. If SMS Survey is turned on, an SMS is sent to the caller (e.g. How satisfied are you with our service?) after the conversation with an agent has ended.

The results from SMS Survey is shown in the Puzzel Admin Portal (*and in interactive.intele.com*). For each caller that received an SMS Survey, there is a row in the Result list containing the callers phone number and the received score and comment (if any). There might be 0, 1 or several rows with a specific phone number in the SMS Survey Result list.

From June 2018, the admin can anonymize an end-customer in the SMS Survey result list, that is, delete the callers number. This is done from the page Archive Anonymize by entering the persons phone number and select anonymize in SMS Survey.

The default storage time for SMS Survey is 25 months, but each night all rows that are older than 4 months are anonymized, that is, the caller's phone number is deleted.

Historical statistics

Historical statistics on overview/queue level and on agent level are stored 1200 days as default. Storage time can be set per customer, and agent statistics can be stored shorter than queue/general statistics, e.g. 1200 days for overview/queue statistics and 365 days for agent statistics.

The incoming callers number is not shown in statistics reports on overview, queue or agent level.

The plan is to make it possible for the admin to anonymize a caller's number/chatter's name/ID in these Survey list reports, but currently the SMS/Chat Survey list report shows one row for each caller and chatter that participated in a Survey, including the caller's number (chatter's ID / email). This list report can be generated for up to 3 months into the past (since Puzzel stores raw data (CDRs) for 3 months).

Real-time information

- **Real-time statistics** per agent (Ticker Agent) are deleted each week
- The agent's **My log** (in the Agent Application) contains the last X requests handled

Login and password

- The basic password requirement is 6 characters including at least 1 letter and at least 1 digit
- The customer's admin can configure that **strong password** must be used for all or selected users. A **strong password** must contain at least 8 characters, including at least 1 uppercase letter, 1 lowercase letter, 1 digit, and 1 special character.
- The customer's admin can turn on **two-factor authentication** for all or selected users. If turned on, the user receives a 5-digit one-time code as SMS or email for each login.
- The customer's admin can configure that passwords must be changed every N days

Logs and access control

In addition to the Archive Audit log, Puzzel contains a **Change log** (3 months storage time) and an **Access log**.

Access log

- Each time a user logs on to Puzzel, we store information about the login (time, IP address, username, browser, client type)
- Both successful logins and failed login attempts are logged
- The entries in the Access log are stored for 14 days

Access control - Who can see what?

Most users (the agents) do not have access to the Admin portal (they can log in but they will only have access to the Home tab).

Admin users can be put in one or more admin user groups. Each user group is given access to the relevant admin functionality (main tabs and sub-tabs), e.g. access to the Archive or not. In addition, access rights can be set on individual users.

Resource filters can be used to limit what usergroups/queues (rows) each usergroup's users should see in different parts of the Administration Portal, including in the Archive.

A user (with access to see the Archive) can be given access to see only general information about calls/chats in the Archive (no access to recordings or chat logs), or also access to recordings/chat logs.

Information about agents (users)

All registered Puzzel users are listed in the Administration Portal on the page Users - Users. For each Puzzel user, the following information can be entered:

- Firstname
- Lastname
- Username (required)
- Email address*
- Mobile number*
- Numeric ID
- Usergroup (required)
- Language (required)

Email or Mobile is required

In agent statistics we show the number of calls, avg. speaktime, time logged on and in pause etc, per agent for the selected time period. Here only agent name (or username if name is missing) is shown (not agent's phone number or email address).

In the **Archive**, we show that the **name of the agent** that answered a call/chat/email as a part of the general information for a request.

Anonymize an agent?

If an agent (employee) leaves your company and you for some reason want or need to remove this agents name from Puzzel historical agent statistics and from the Puzzel Archive, this can be done.

Find this agent on page *Users Users* in the Admin portal and click on his name to open the *Edit user* page. Here **you must change this agents firstname and lastname to something that can not be associated with this person, e.g. John Doe, and then save.**

When this is done, this (use-ids) agent name is updated to the new name in the agent tables both in Statistics and Archive the following night.

- If someone from now on generates a historical **statistics** report on agent level, the calls answered by the agent you changed name on will show the new agent name (e.g. John Doe).
    - Under Customize, in the agent list, you will find the new agent name but not the old.
- If someone finds a call in the **Archive** that was answered by the agent you renamed, the agent name will be the new one (e.g. John Doe).
    - In the Agent list box under Search, you will find the new agent name but not the old.

If you want, you can also and **delete this agent** user (on page Users Users) after you have changed his/her name. If you do not delete the Puzzel user (for a former employee), you should delete the users email address/mobile number and change the password so that the former employee cant reset his/her password and log on to Puzzel.

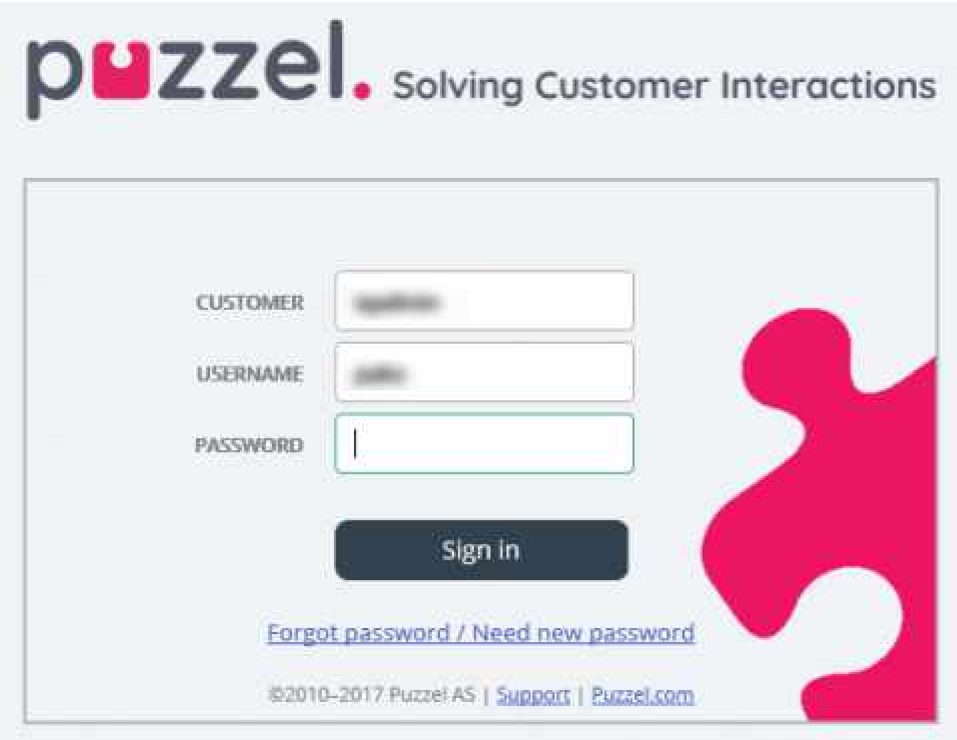
Archive API

A user with access to use Puzzel web services and with access to the Archive can:

1. Retrieve general information about a request based on session ID
2. Play/stream a request's call recording
3. Download a request's call recording
4. Download a request's chat log
5. Delete a call recording
6. Delete a chat log

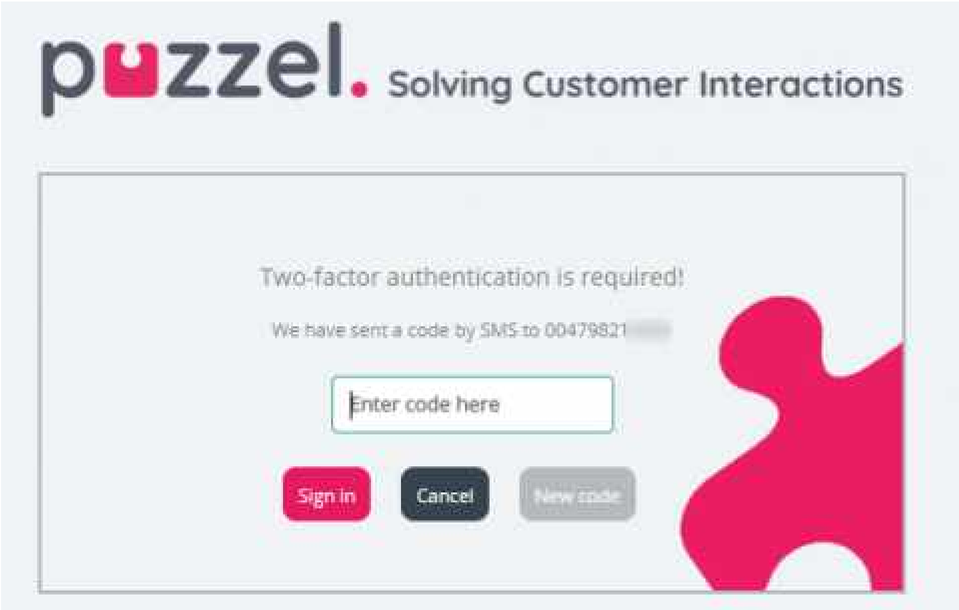
Sign in and password

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

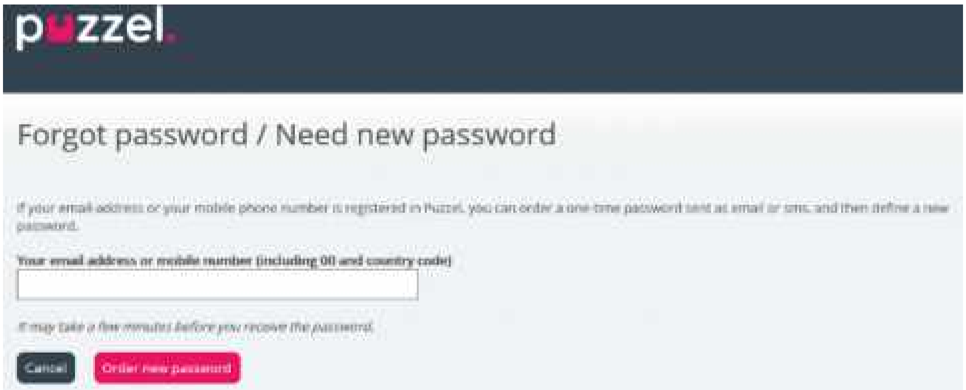


If an incorrect password is entered 4 times in a row, the user account will be blocked. The user can re-open the account by ordering a one-time password (by email/SMS) and define a new password.

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 only supported in admin.puzzel.com, agent.puzzel.com and in the Puzzel app.



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 new (one-time) password.



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.

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 dont 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.

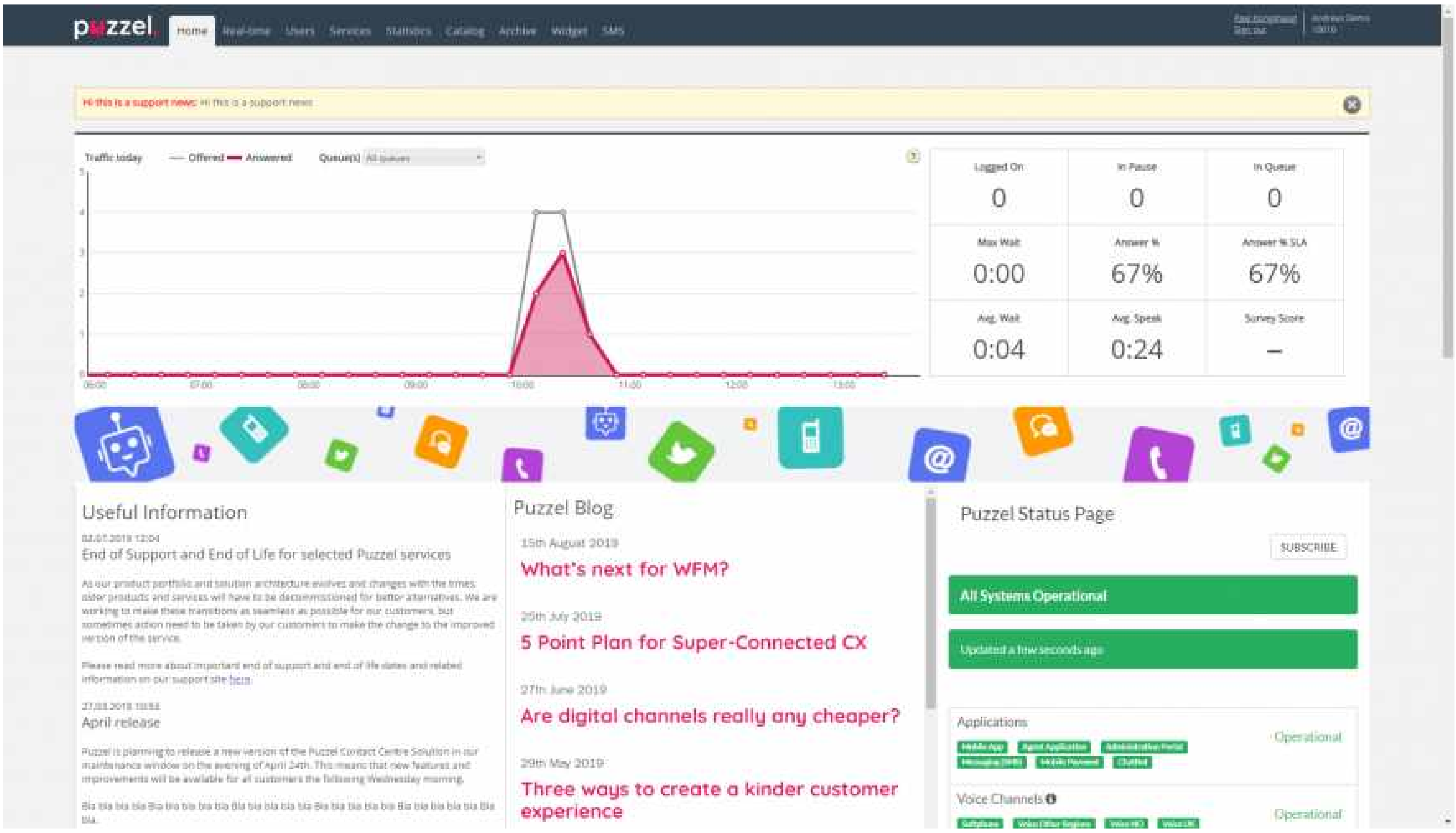
Note

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

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.

Note

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.

Overview

Sign in to Puzzel Administration Portal here:http://admin.puzzel.com

Puzzel Administration Portal has various tabs each containing sub-menus that give you access to different functionality. Not all customers have access to all 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 statistics reports, customise reports, and configure what reports to be sent to which recipients at what time intervals
Catalog	See catalog content and configure fields, departments, and mappings

Tab	Short description
Archive	Search for and analyse calls, recordings, and chat logs
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 corner, below the menus. 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.

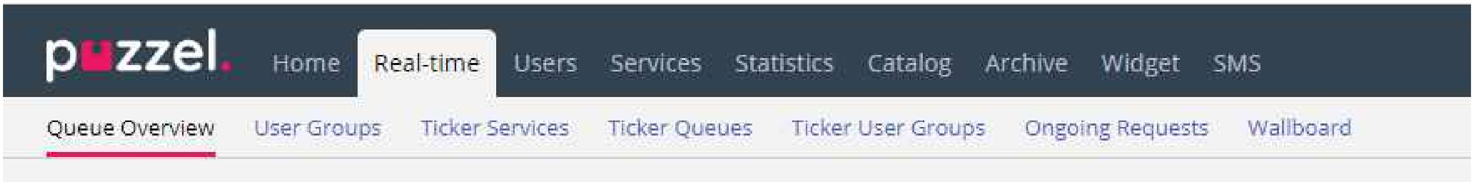
Example: Show rows (users) that contain ***tho*** in any field except e-mail address:

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.

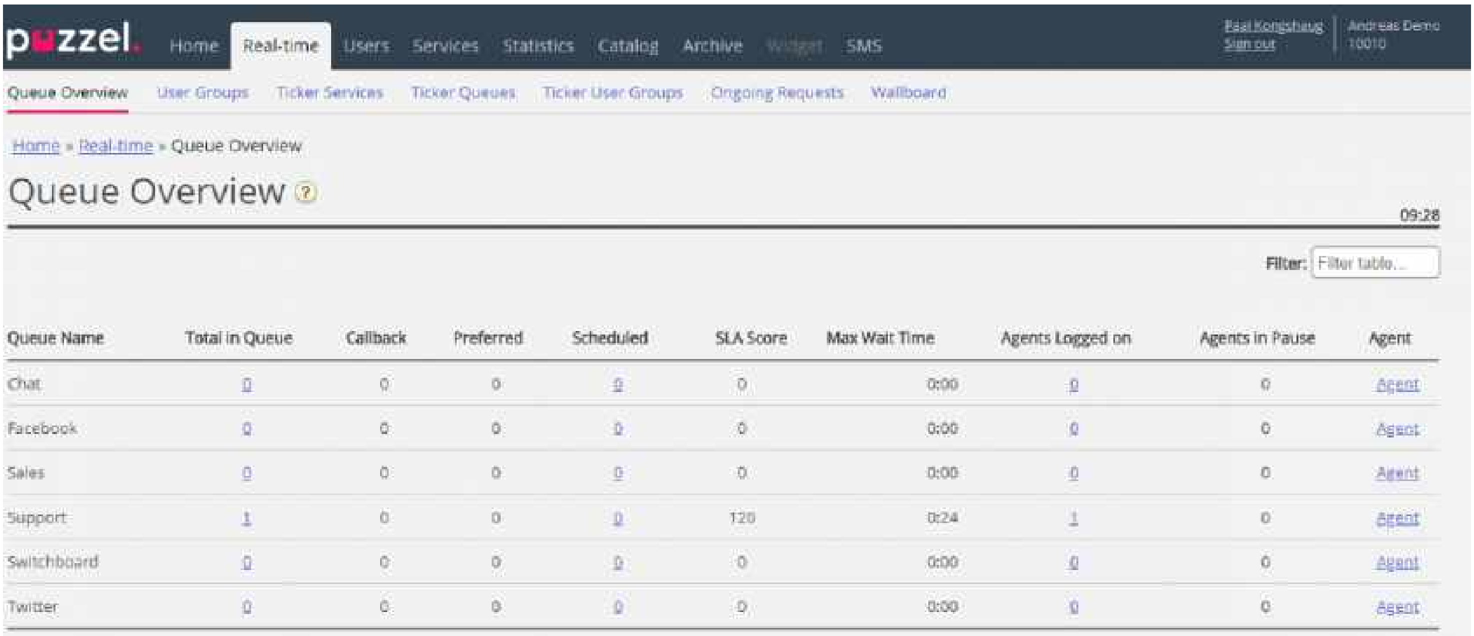
Real-time

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



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.



- ***Total in queue:****Total number of requests currently queued (in this Display Queue)*
- ***Callback:****Number of requests in the queue that are callbacks*
- **Preferred**: Number of requests in the queue that 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" in the "Services" article*
- ***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*

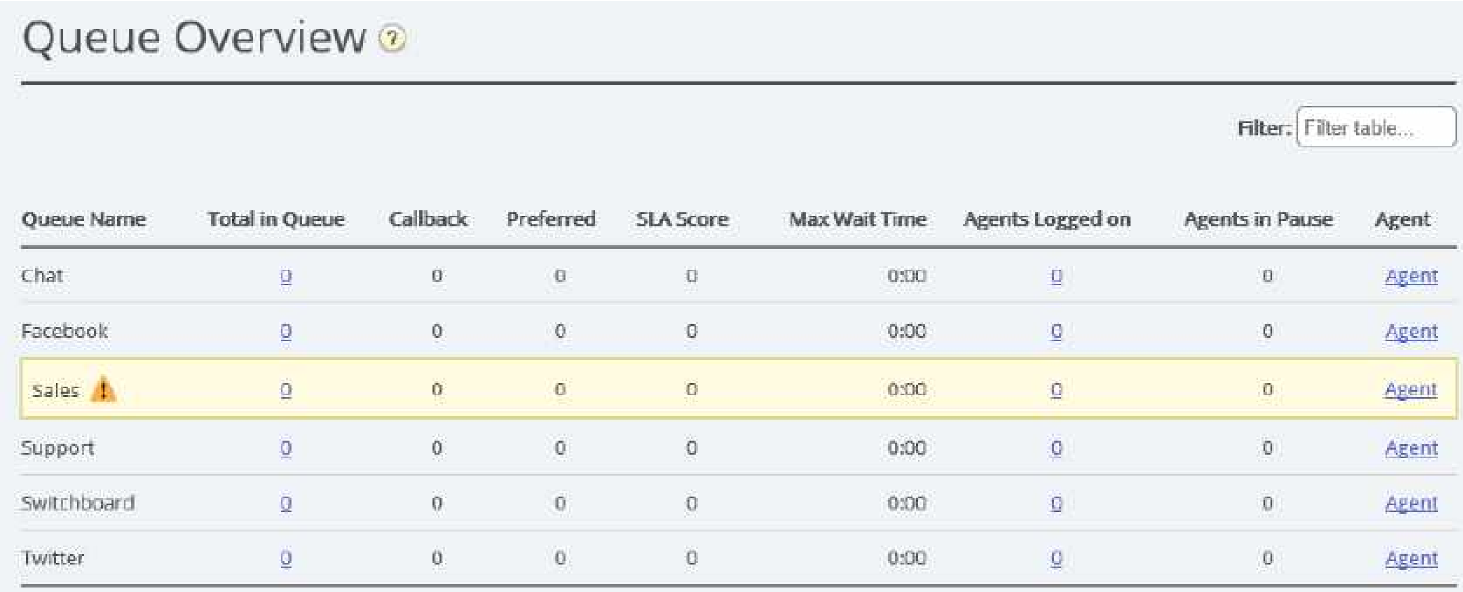
- ***Agents in Pause:****Agents that are in Pause*
- ***Agent:****Clicking on the Agent link, a new window will open giving more information about agents that are logged on to that queue*

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 the Agents Logged on column, Agent status opens*
- *By clicking on Agent in the Agent column, the Agent details opens*

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.

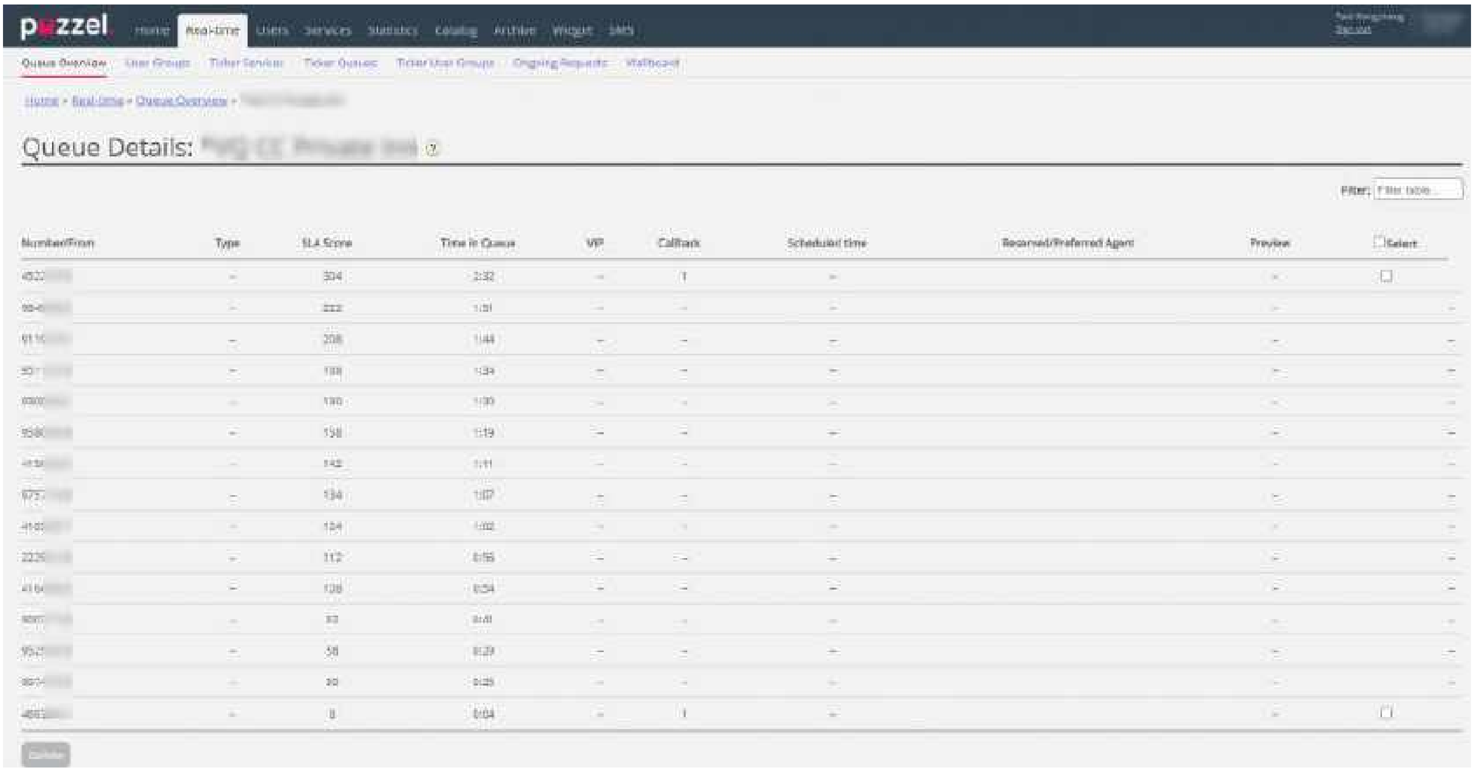

Queue Overview

Filter: Filter table...

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

Queue details

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



This page is updated automatically and contains the following data:

- ***Number/from****: Phone number/e-mail 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 requests 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*
- ***Call-back****:*

    - Normal request
    - 1, 2, 3: Call-back 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/e-mail/chat has a reserved/preferred agent*

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

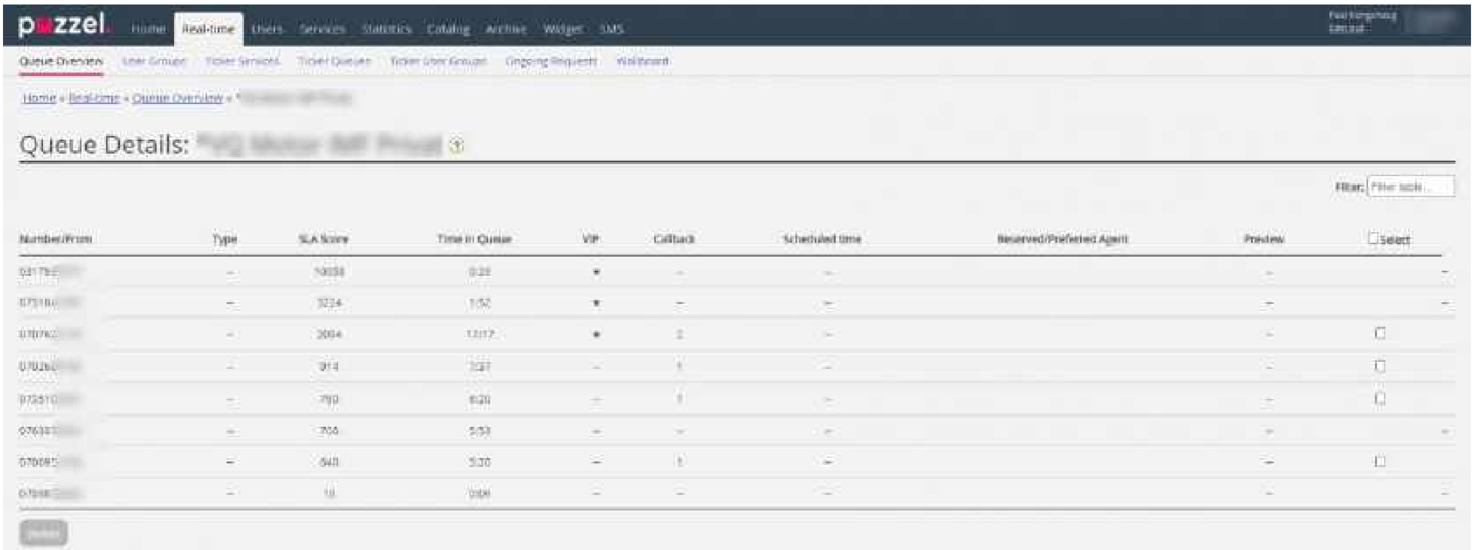
If you click on the *Preview* link for a request with media type email, you will see the request's From, To, Subject and Sent time, and if you click on *Preview* for a Scheduled task, you will see all the task's details entered except the Description.

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 or by **voicemail**, a new call will not be done.
- If the call is **not answered** by the customer or voicemail, the default is that no more calls will be done (1 callback 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 is 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 (parameter name 'secBetweenRetries')) can be configured, e.g. 1 minute. This quarantine is to prevent doing the 2nd callback a very short time after the 1st callback in the special case none or very few are now waiting in the queue. If you only offer callback when the estimated wait time is quite long, the wait time is probably still quite long after the 1st callback attempt is done, so a quarantine is usually not needed (or could be very short).

For a customer waiting for the 2nd or 3rd callback attempt, 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 (and quarantine)). 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.

Agent Status

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

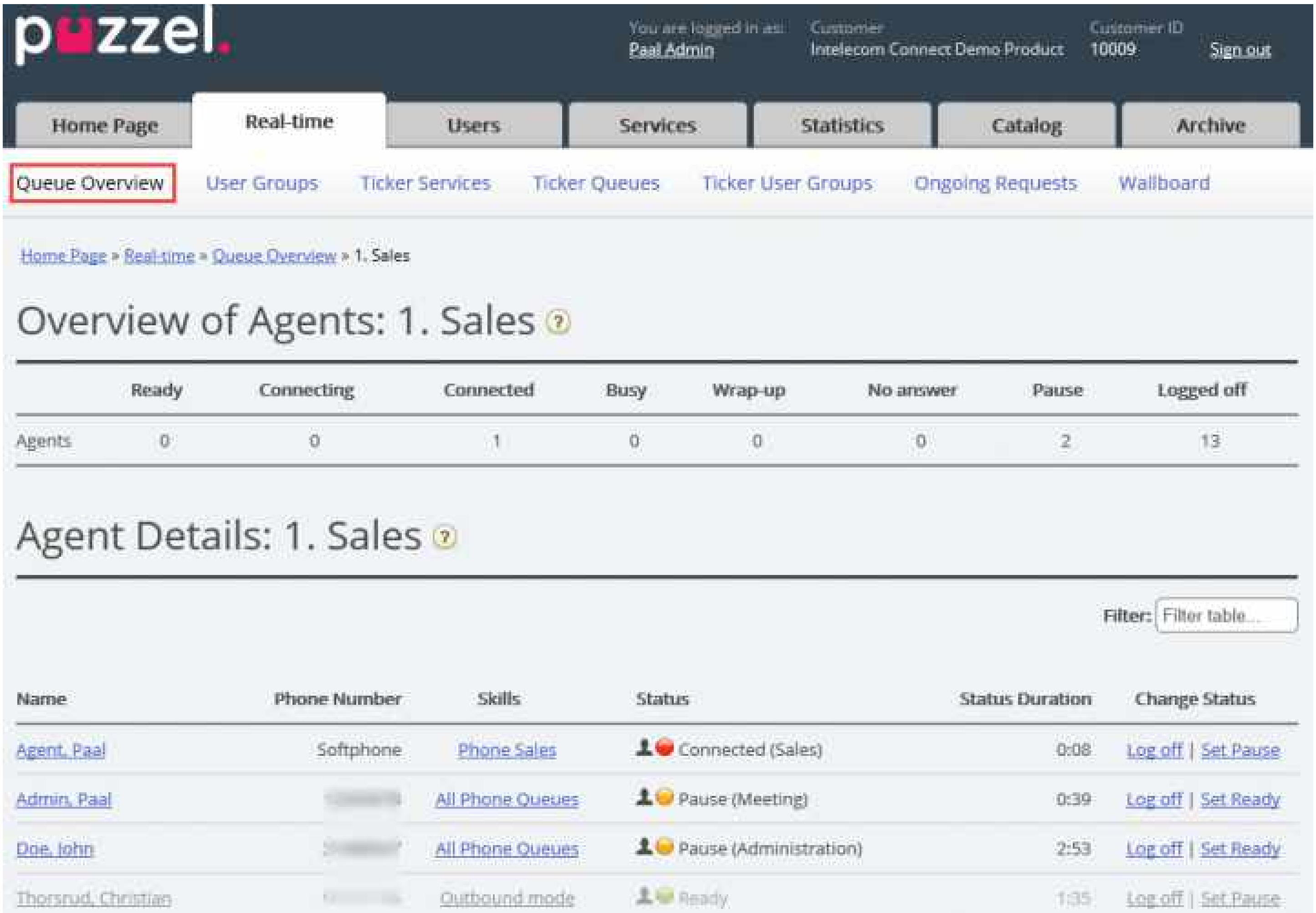
1. Sales

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.

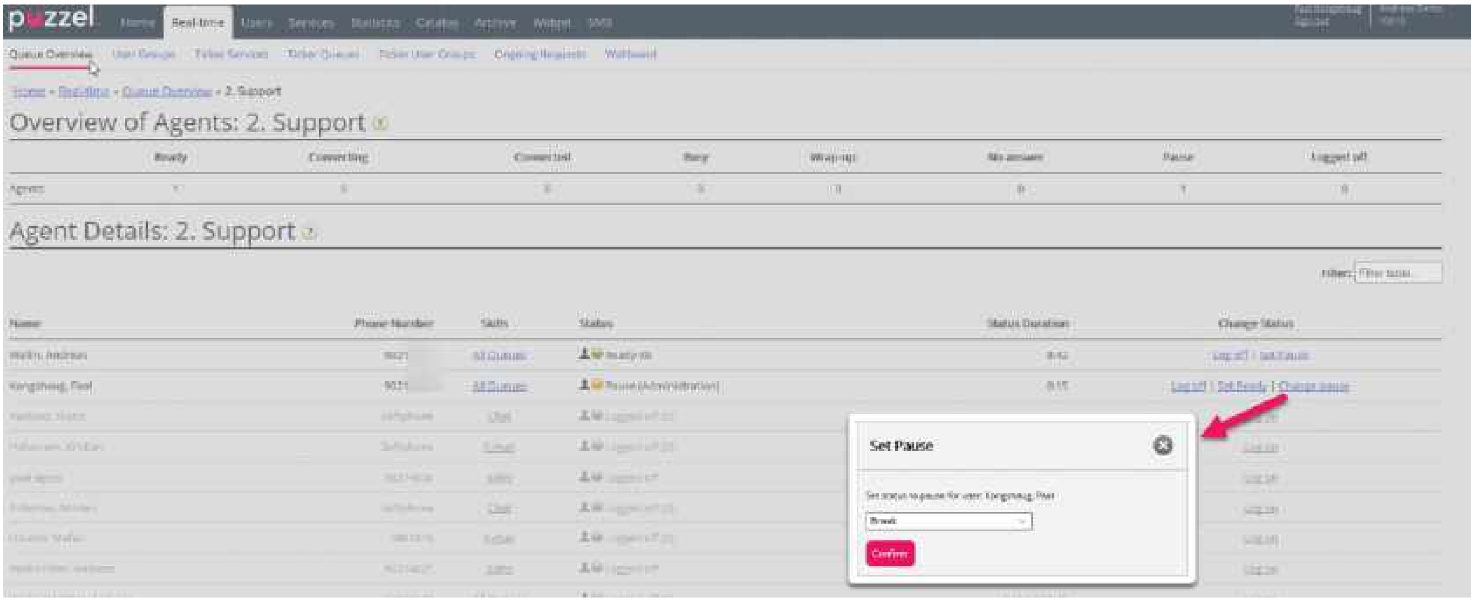
Agent Details

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



The page is divided into two 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.*



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 cant 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.

Scheduled tasks/calls

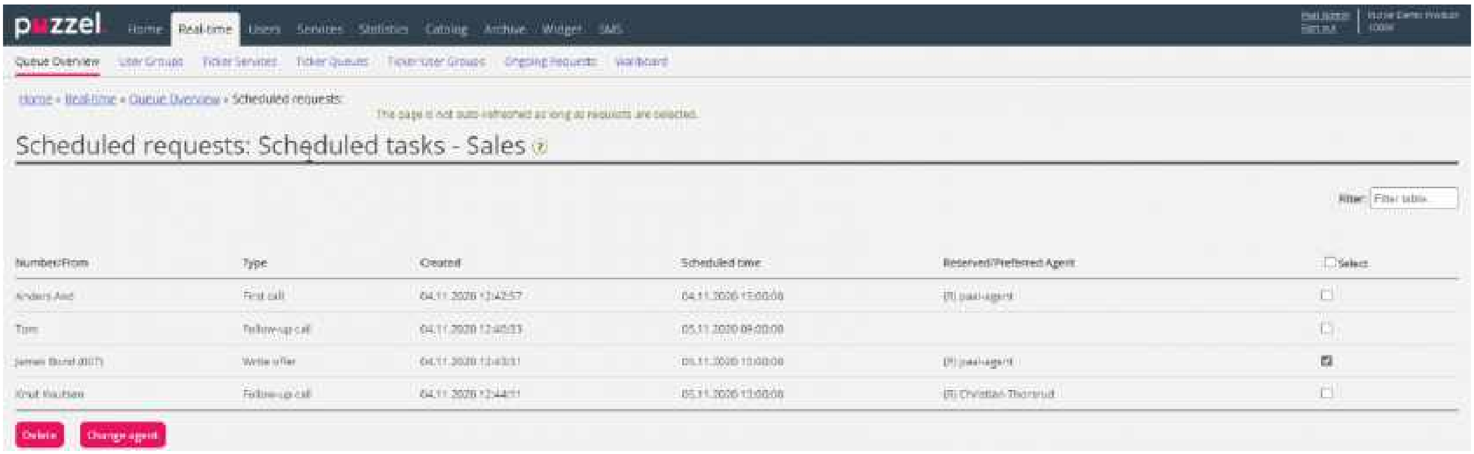
If scheduled callback is offered to your end-customers (ordered from a web page) or if your agents can Schedule tasks from the agent application, a column called *Scheduled* can be shown in the Queue overview (*Users Products Queue: Show Scheduled requests*).

When a scheduled callback/call/task is ordered (e.g. at 08:58) with a scheduled time (e.g. 12:00), this call/task is put in the queues 'waiting room' and is shown in column *Scheduled* until the scheduled time, and then its moved into queue and shown as 'In queue' (In Queue Details).

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 queues 'waiting room' is 1000.

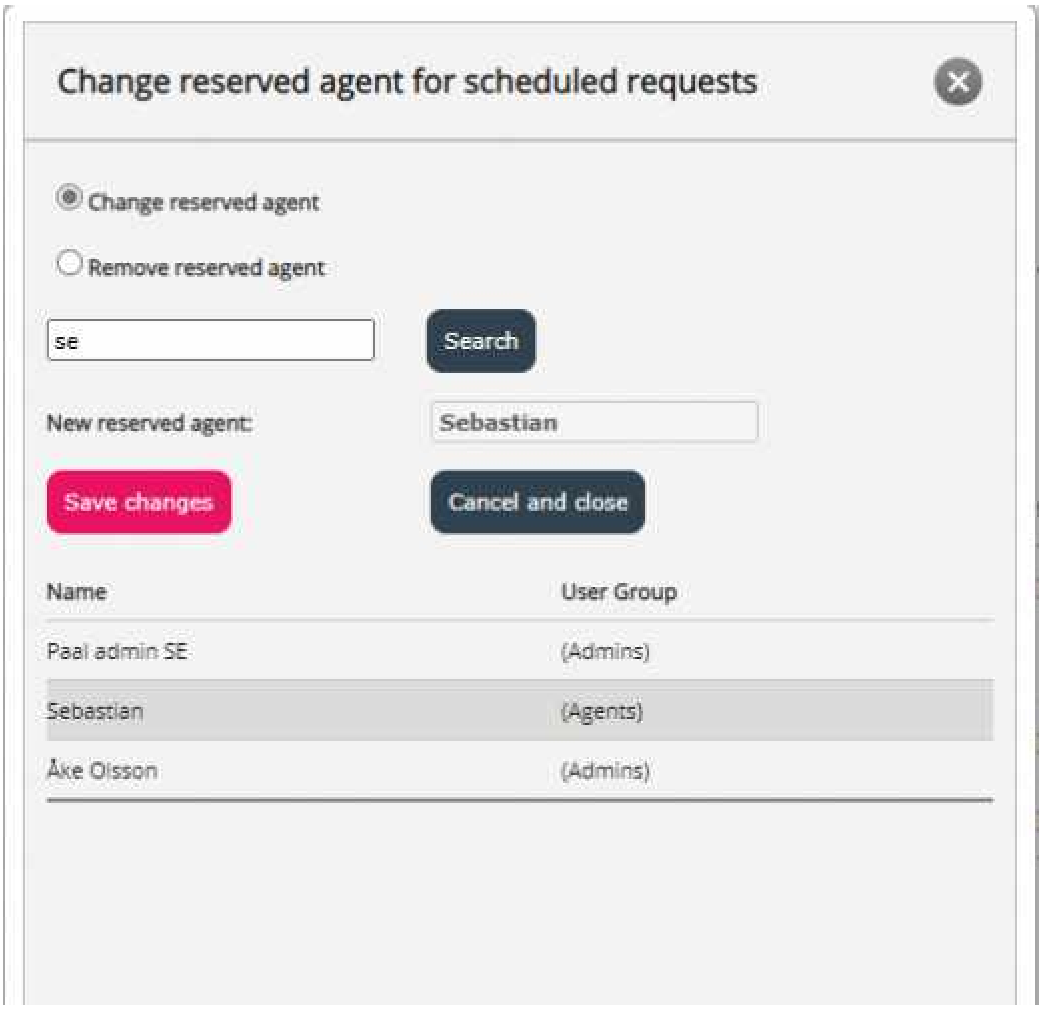
If you click on a number in column *Scheduled* in the Queue overview, the page *Scheduled requests* is shown for the selected queue. Here we show one row per request currently in this queue's 'waiting room'.



A user who has access to delete requests (emails/callbacks) in queue in the Admin Portal (Users - Products - Queues), will also have access to delete scheduled tasks and edit the reserved agent for scheduled requests/tasks here.

You can select one or more Scheduled tasks (requests) and click *Delete* or *Change agent*.

- If *Delete* is clicked, you are asked to confirm before these requests are deleted,
- If *Change agent* is clicked, a new window opens, and here you can add, change or delete reserved agent.



If you select *Change reserved agent*, search for and select an agent, and then click *Save changes*, we will set the selected agent as the new reserved agent for the selected request(s), and we will use the new agent's predefined reserved time (Users Products – Agent application - Scheduled task reserved time in minutes).

If you select *Remove reserved agent* and click *Save changes*, we will remove the reserved agent for the selected request(s).

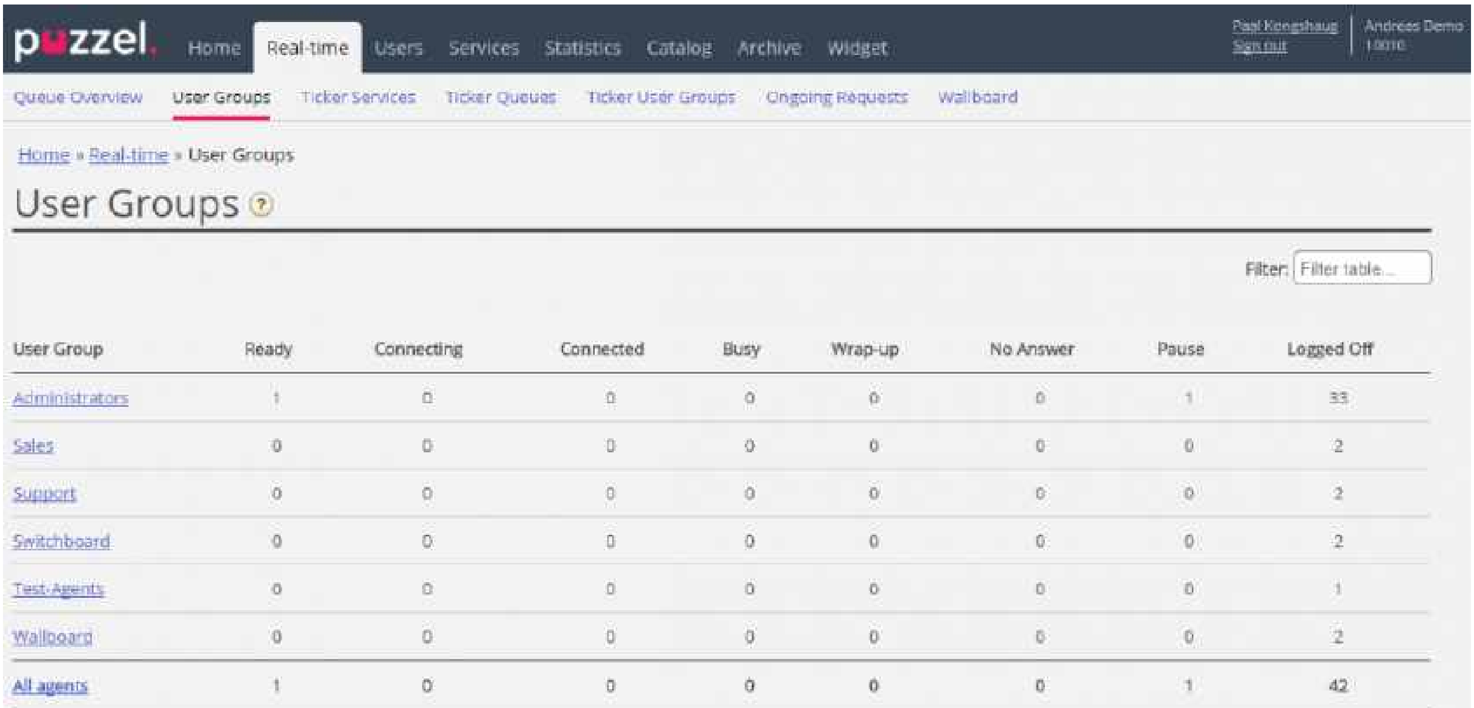
If you click the *Preview link* for a Scheduled task, we will show all its details except the

Description.

puzzel. Solving Customer Interactions

User Groups

Under Real-time User Groups you can see the 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
Test-Agents	0	0	0	0	0	0	0	1
Wallboard	0	0	0	0	0	0	0	2
All agents	1	0	0	0	0	0	1	42

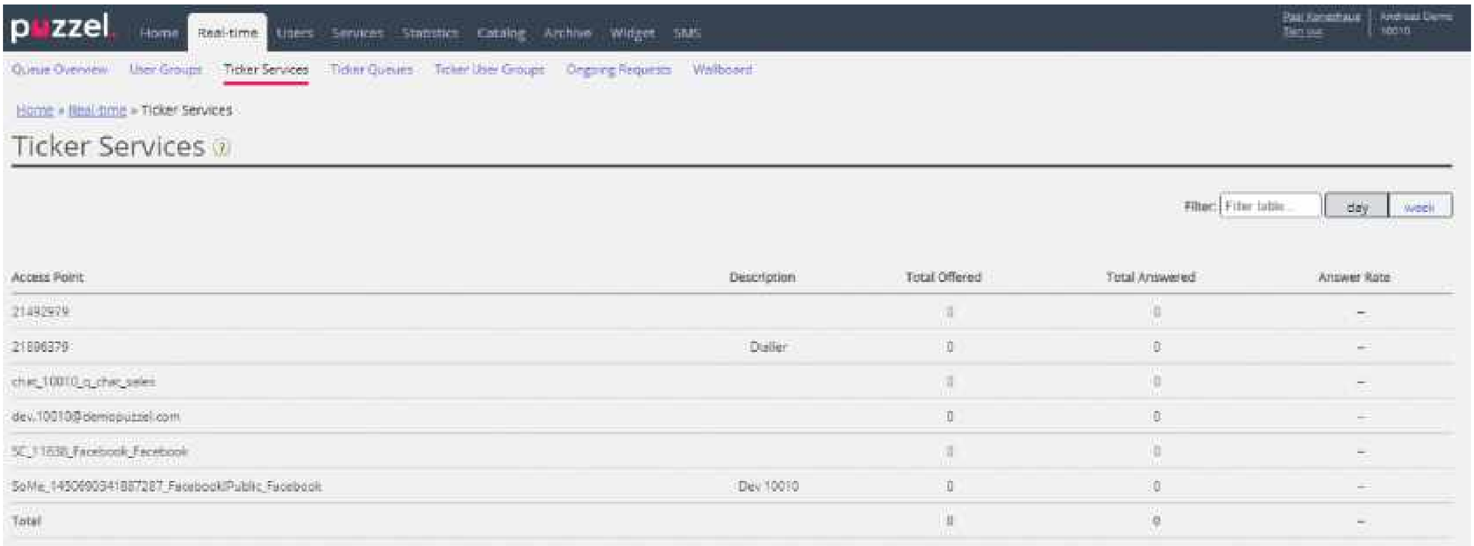
By clicking on a hyperlink in the User Group column, you will see all the agents that belong to the selected user group, their status and the profile they now are using.

Agent	Phone Number	Profile	Status	Time in Status	Change Status
Admin, Paal	1234	All Phone Queues	Pause (Meeting)	1:21:22	Log off | Set Ready
Thorsrud, Christian	9572	Outbound mode	Ready	1:22:18	Log off | Set Pause
Doe, John	2149	All Phone Queues	Pause (Administration)	1:23:36	Log off | Set Ready
Redseth, Thomas	Softphone	Chat	Logged off (0)	16:42:23	Log on

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.

Ticker Services

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



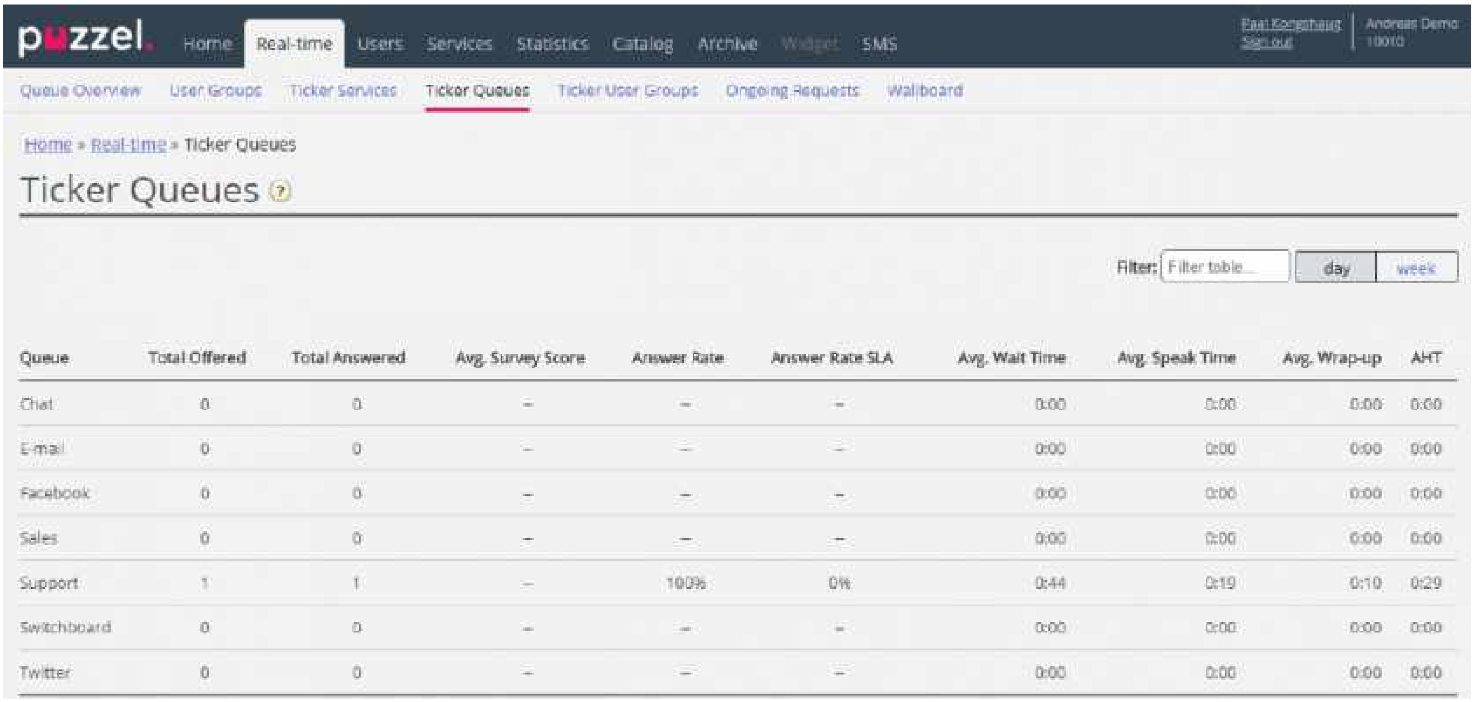
You can toggle between Day and Week view. Day view shows values so far this day (starting midnight), while Week view shows values so far this week (starting midnight between Sunday and Monday).

- **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.

puzzel. Solving Customer Interactions

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.



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. speaktime + 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 chats 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 the 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 callbacks in the queue are 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).

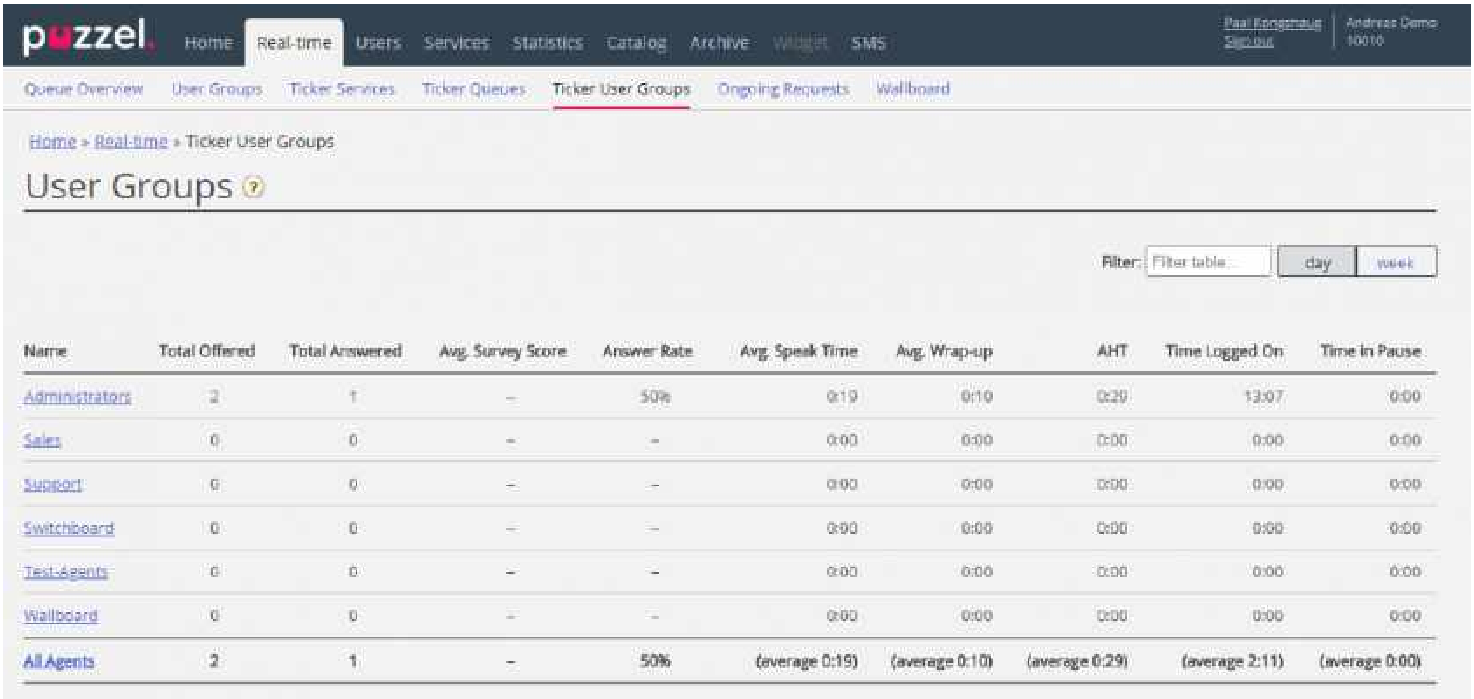
Agent-to-agent calls are not shown here since they are not linked to a queue.

Note

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%

Ticker User Group

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



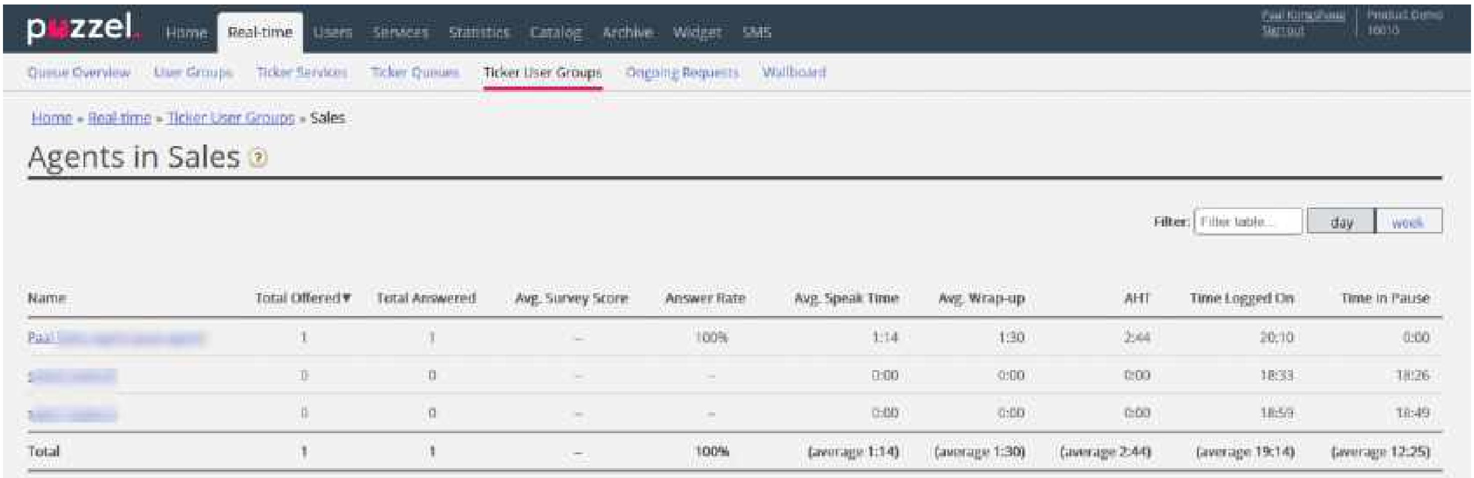
Name	Total Offered	Total Answered	Avg. Survey Score	Answer Rate	Avg. Speak Time	Avg. Wrap-up	AHT	Time Logged On	Time in Pause
Administrators	2	1	–	50%	0:19	0:10	0:29	13:07	0:00
Sales	0	0	–	–	0:00	0:00	0:00	0:00	0:00
Support	0	0	–	–	0:00	0:00	0:00	0:00	0:00
Switchboard	0	0	–	–	0:00	0:00	0:00	0:00	0:00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

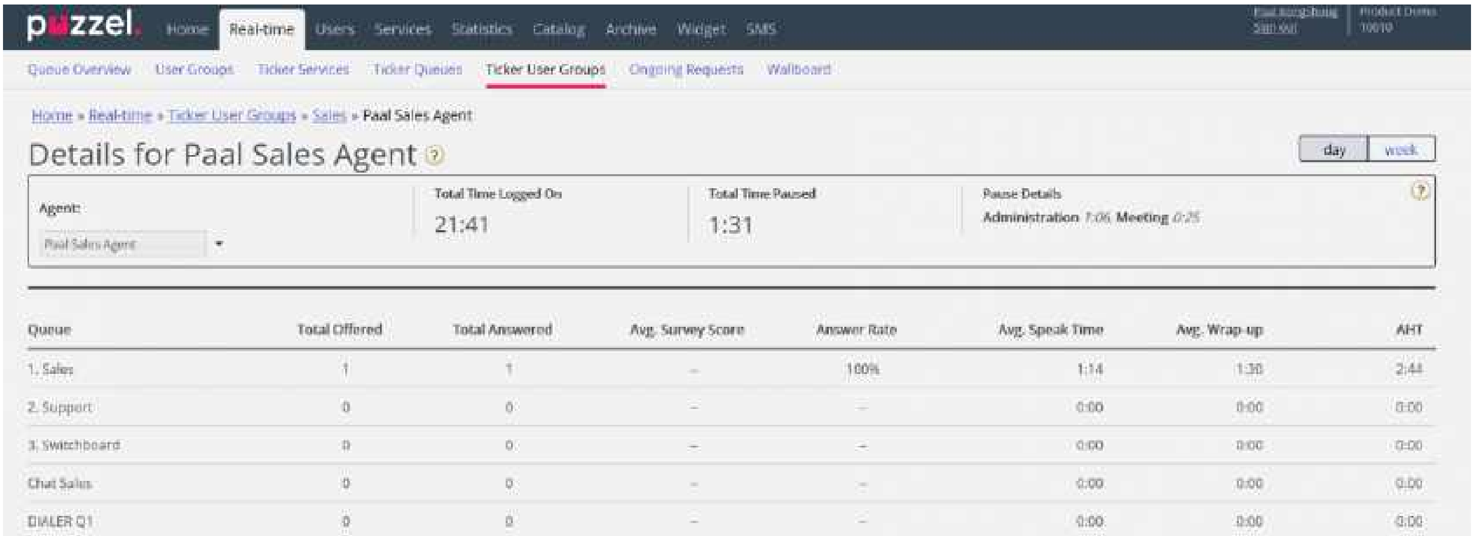
* The column ***Average Survey score*** is shown only if property *Show Survey score in Ticker Agent/User group* is ON. If a customer started a chat with agent 1 and this agent invites another agent into the chat (to consult and/or transfer), the Survey record will be linked to and reported on the last 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
Paul	1	1	–	100%	1:14	1:30	2:44	20:10	0:00
	0	0	–	–	0:00	0:00	0:00	18:33	18:26
	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 agents name opens this agents 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.

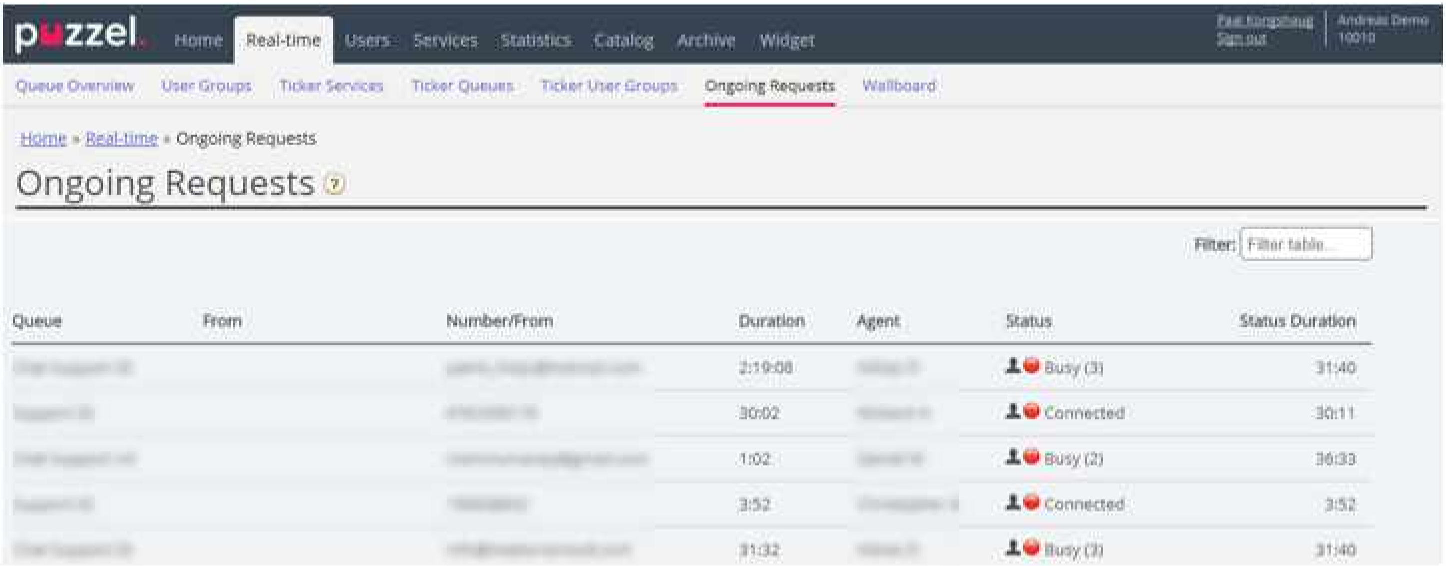


Note

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.

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.



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 agents Status duration since agents can handle multiple written requests (that don't start at the same time), and the agents 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.

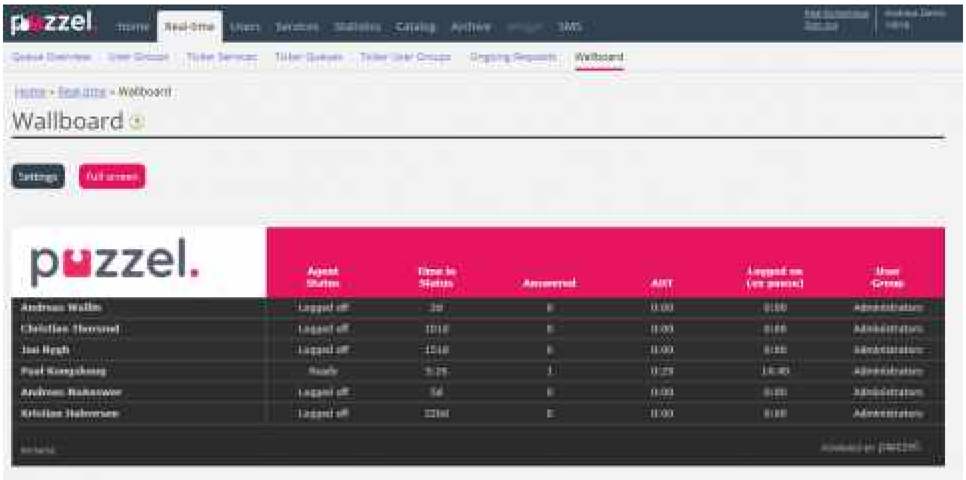
Ongoing chat.

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 its ended, the chat will be shown as ongoing, but you cant 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.

Wallboard

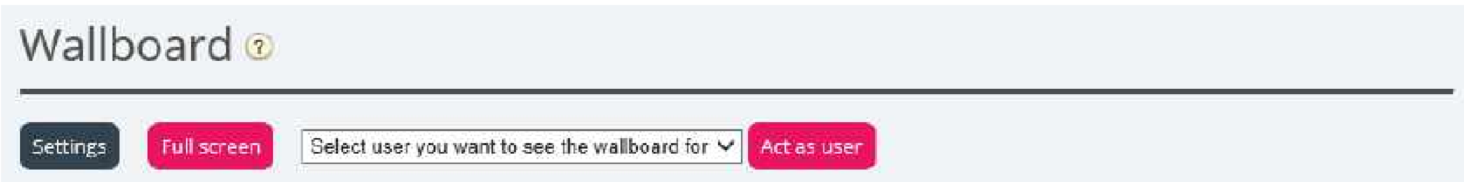
Wallboards are used to show information per display queue and/or agent information on a big screen, so that everyone in a room can have a clear overview. The information in a wallboard is as default updated every 5th second.

We recommend a user group called Wallboard with one user per wallboard you need. Users in this 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.



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

A user can deploy Wallboard settings on behalf of other users in the Wallboard area, if *Act as another user(wallboard)* is turned 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 the full screen mode, just click on the Full screen button.

	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%

14:21:43

Queue Wallboard

	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

14:28:30

Agent Wallboard

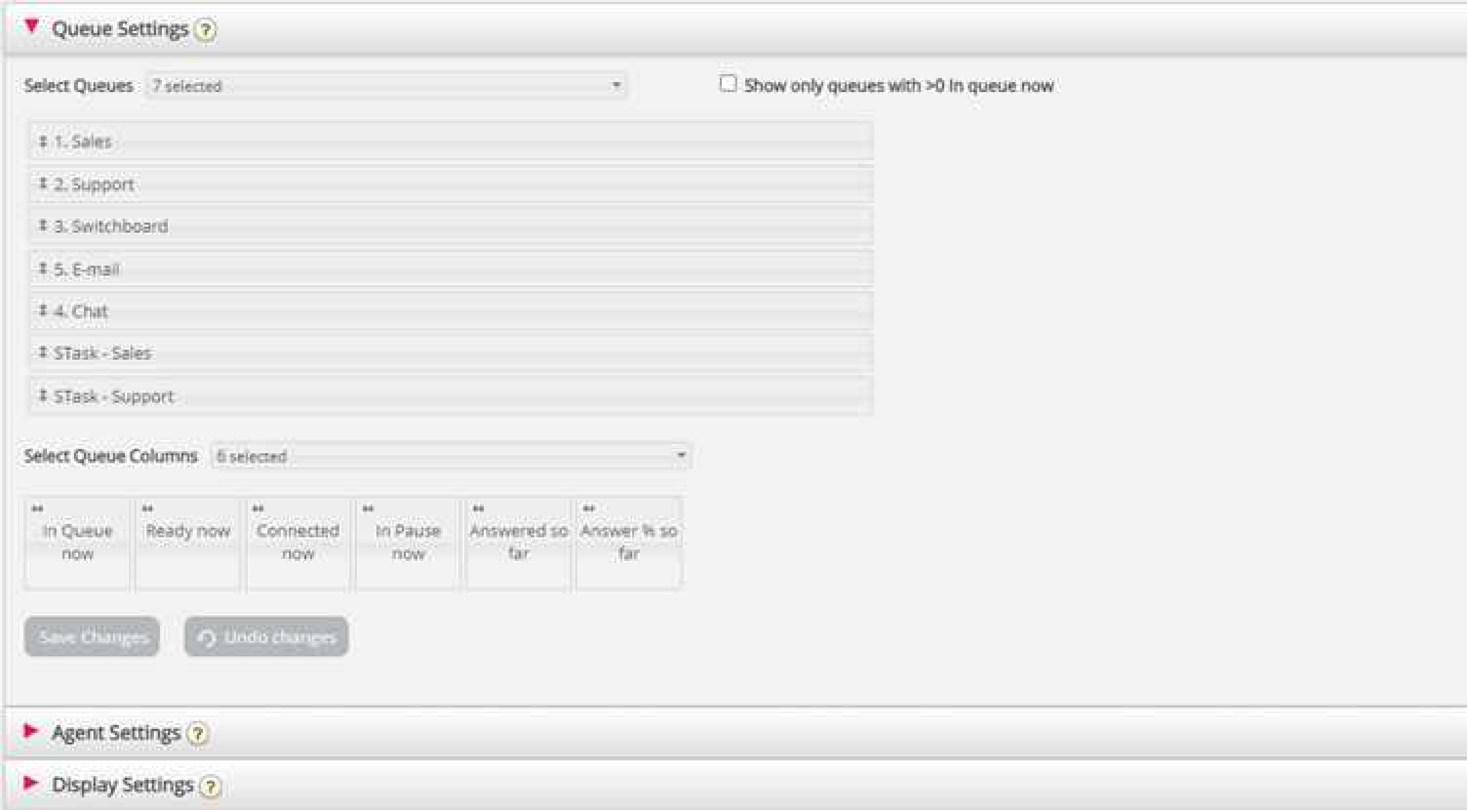
Wallboard Settings

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

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

Queue Settings

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



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
- wait time for answered so far
- speak time so far
- wrap-up so far
- AHT so far
- 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, its 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.

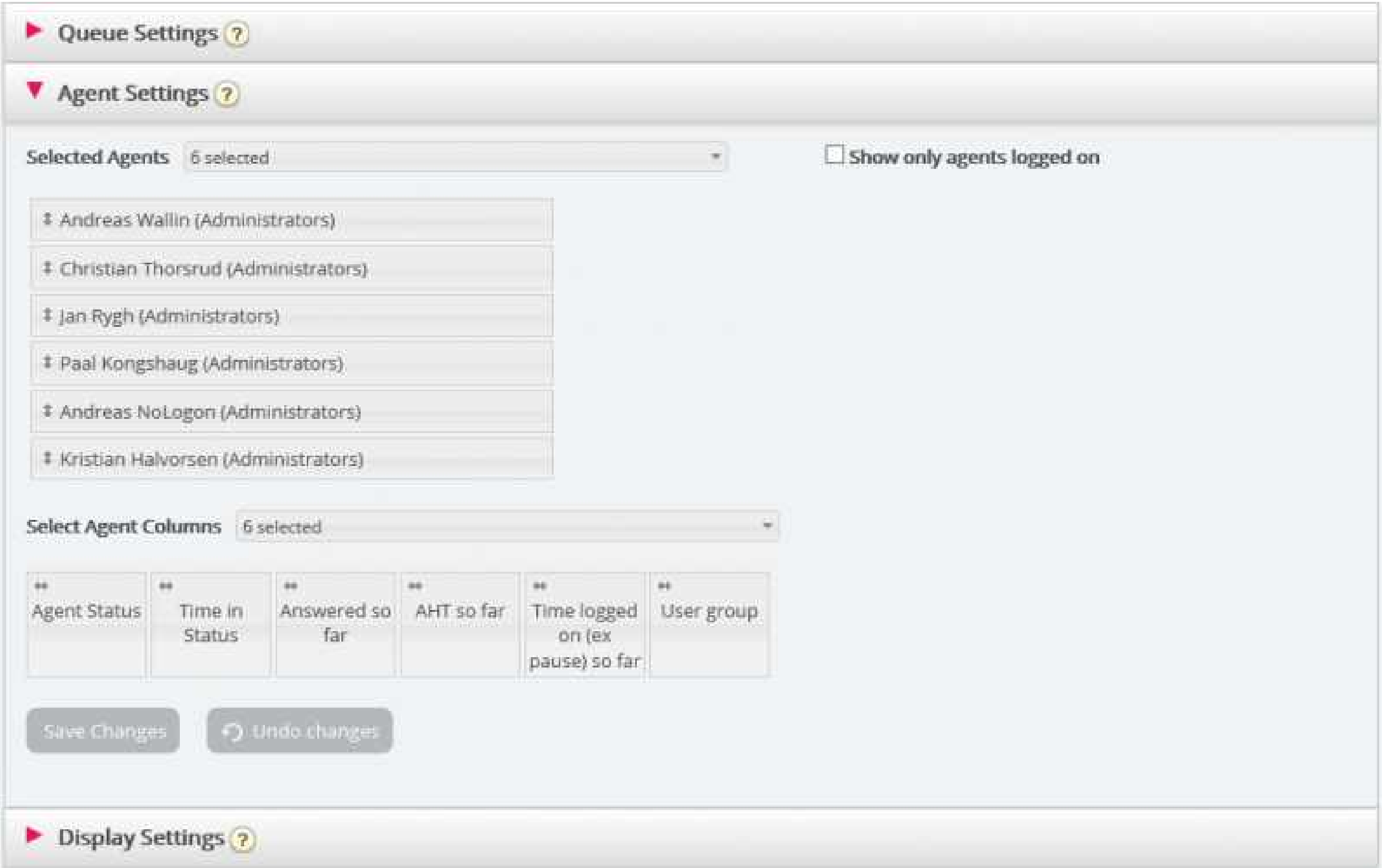
Also, please note that there are other queue exits than Abandon (=Hang-up) and Answered by agent, e.g. callback ordered, caller left queue due to pressing x, timeout, caller left queue since queue was full or no agents logged on. There are several columns for such exits available in the statistics report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

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.



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.

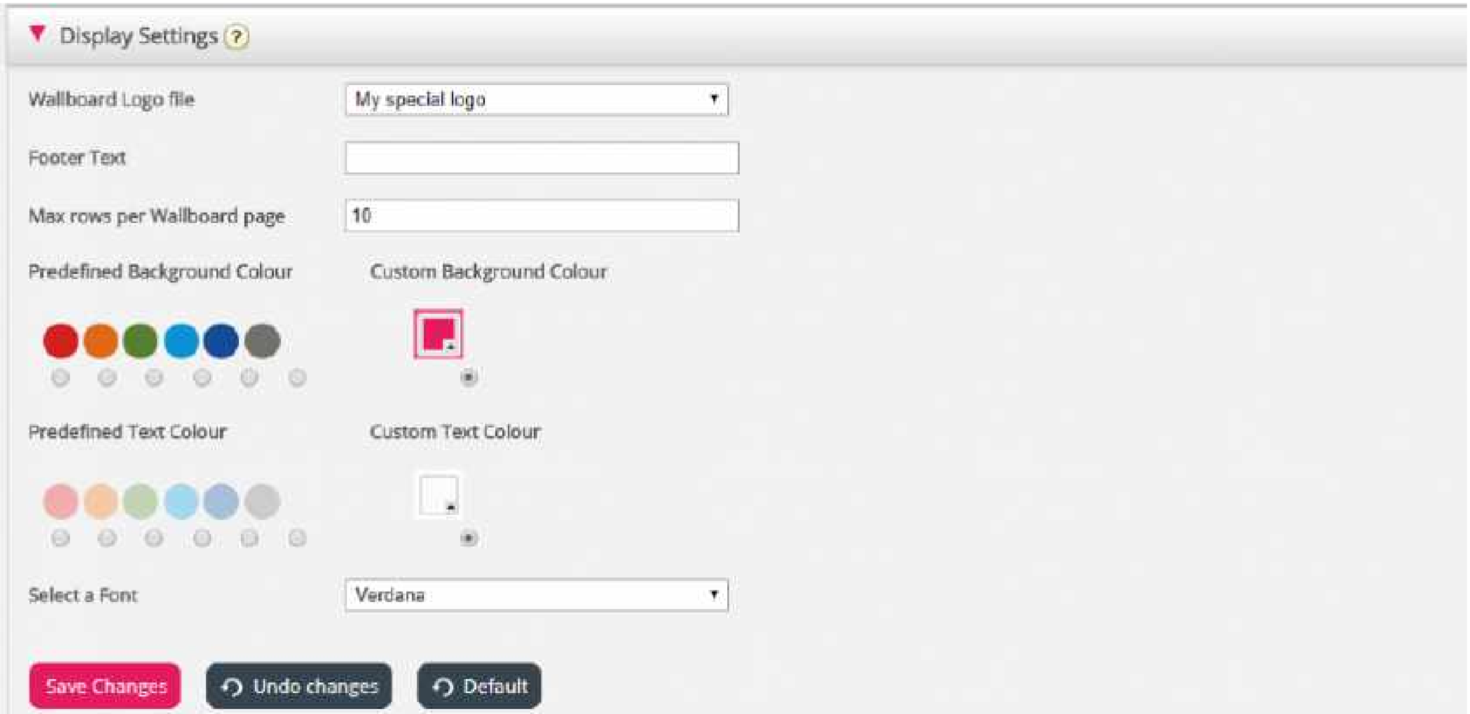
Available columns to choose from:

- Agent status
- Time in status
- Offered requests so far

- Answered so far
- speak time so far
- 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

Display Settings

If you want to personalise the wallboard with **your own logo** (instead of using Puzzels logo), you can **upload your logo file** to page *Services Content*, and then select it in the listbox *Wallboard logo file*.



If you want a **footer text** on the Wallboard, just type the text you want in the appropriate field 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 rigt 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 Puzzels default settings.

Details about Agent Statuses

For customer with only phone queues, the agents 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, its 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 agents 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 agents 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 agents status is shown in the same way in the Administration Portal.

How does it work?

- If the agents phone is *Ready (N)* (=not blocked due to >Y written requests), the agent can receive an incoming call.
- If the agents phone is blocked due to >Y written requests, the agents 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

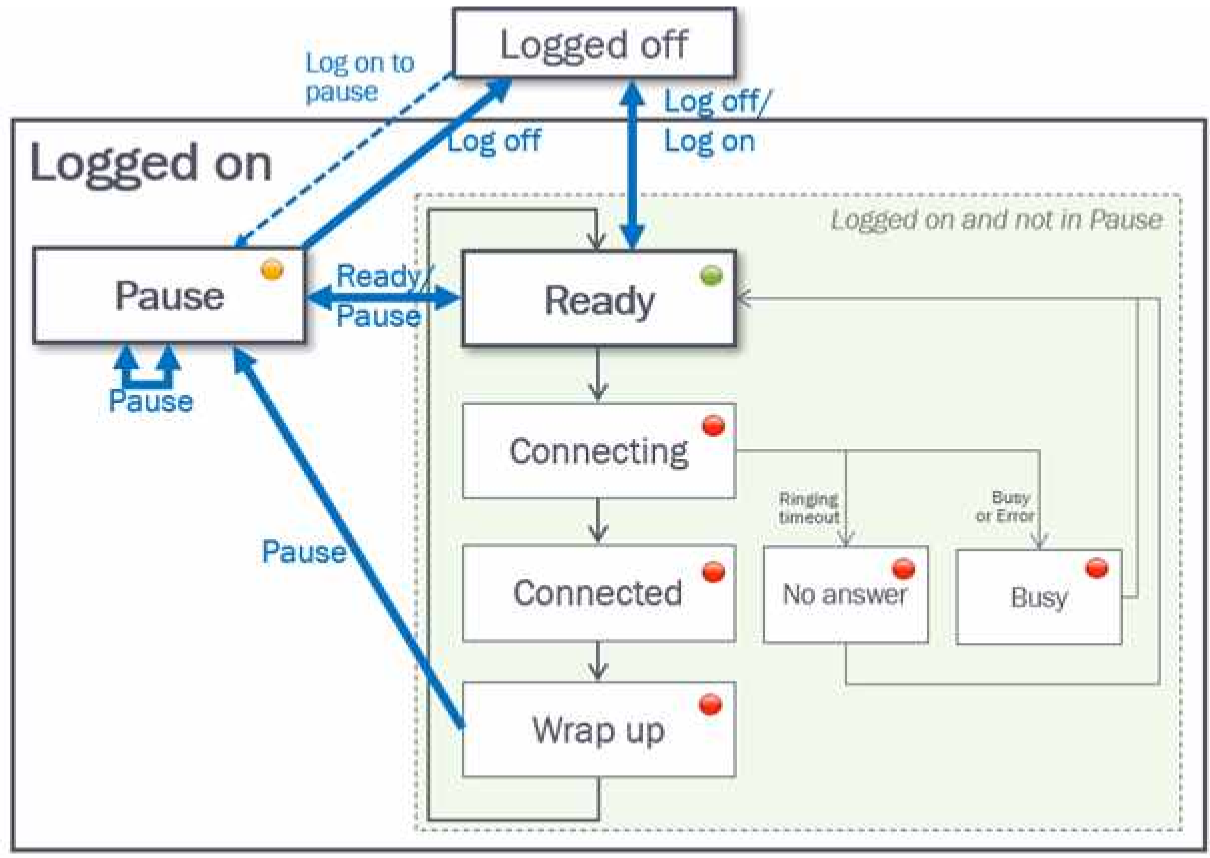
Parameter	A	B	C	D
Max **total** concurrent written requests	4	4	4	2
Max concurrent **email/eta**sk requests	1	1	1	2

Parameter	A	B	C	D
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 agents 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 *Block phone if >Y written requests* (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 out" but not answered within the predefined ringing time (default 30 sec), the agents 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

Solving Customer Interactions

Users

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

This is where you can manage the 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).

The user groups inherit the Puzzel customers 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.

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

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. the Queues they answer (skills), Department/role, or Location.

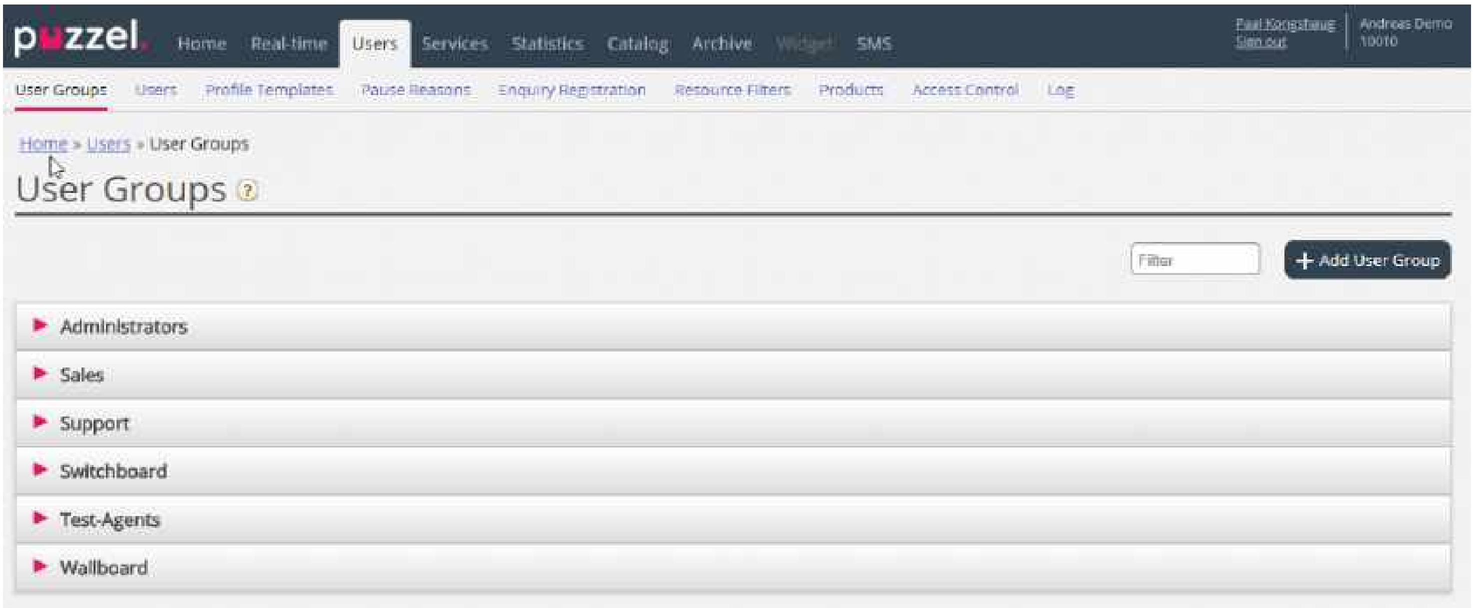
When defining your User groups for agents, remember that the profiles agents log on with are defined on a user group level, that settings are easiest to handle on a user group level, and that user group is used in statistics reports and in Ticker.

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.

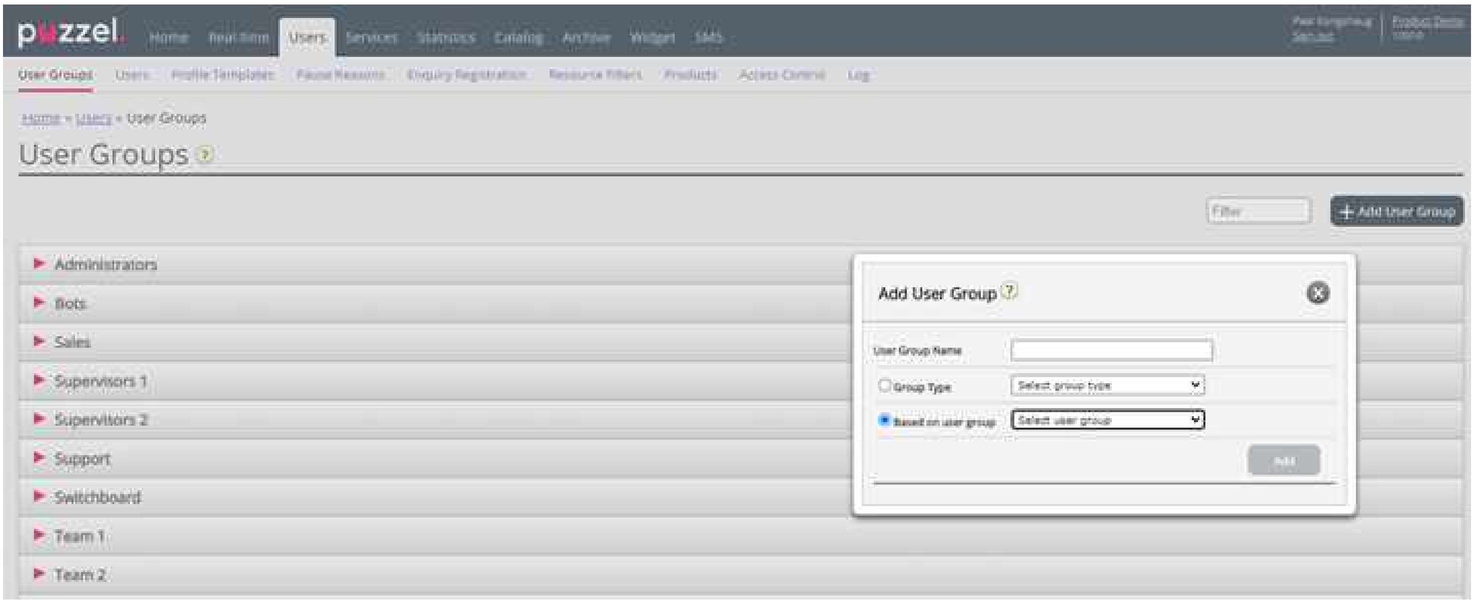
When you open the User Groups page, you will see a list of user groups in your solution.

Solving
Customer
Interactions



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-logoff 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 groups 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)

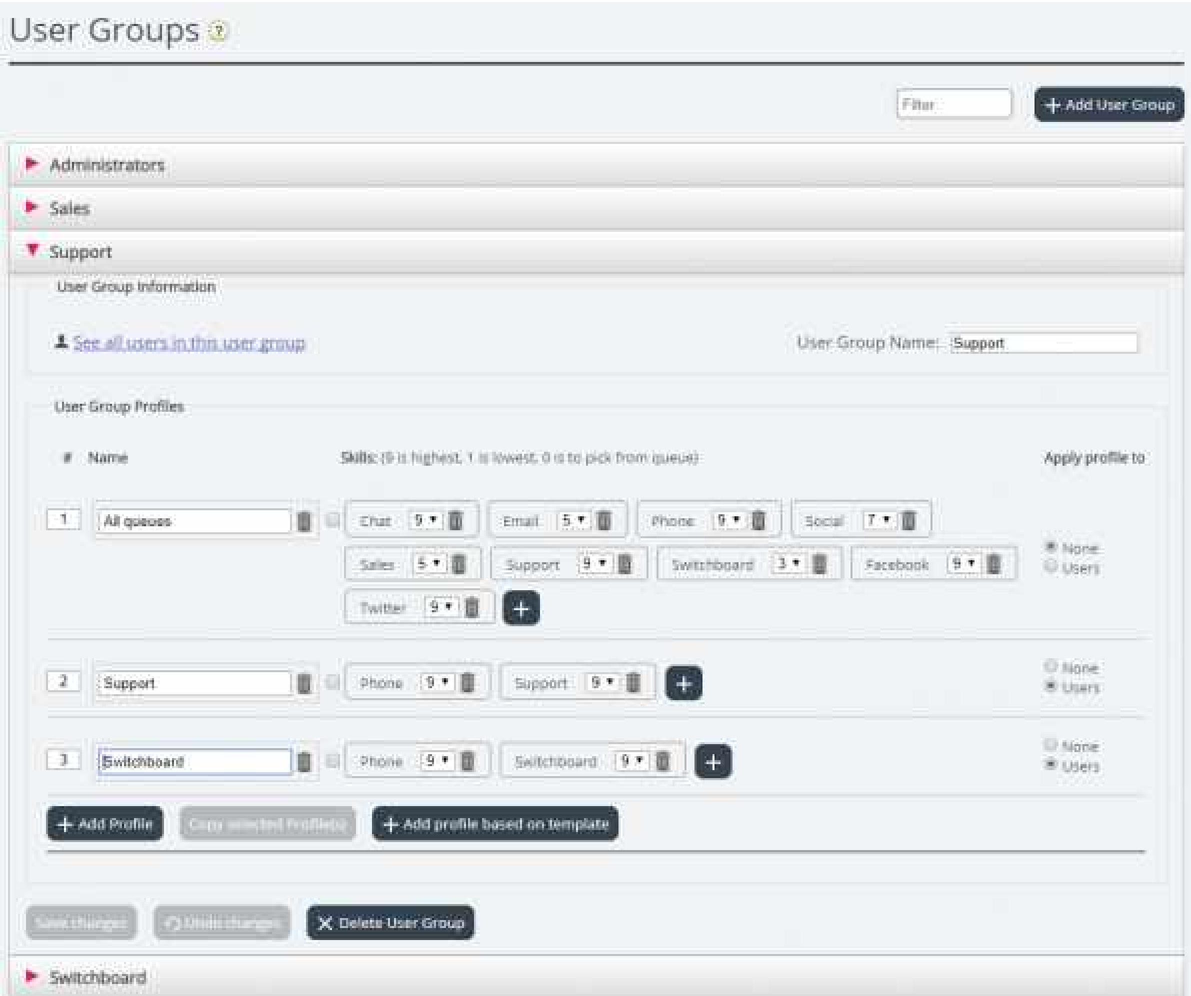
If a user in an Agent user group signs in to the Administration portal, he will only have access to the Home Page tab.

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.

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.



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:

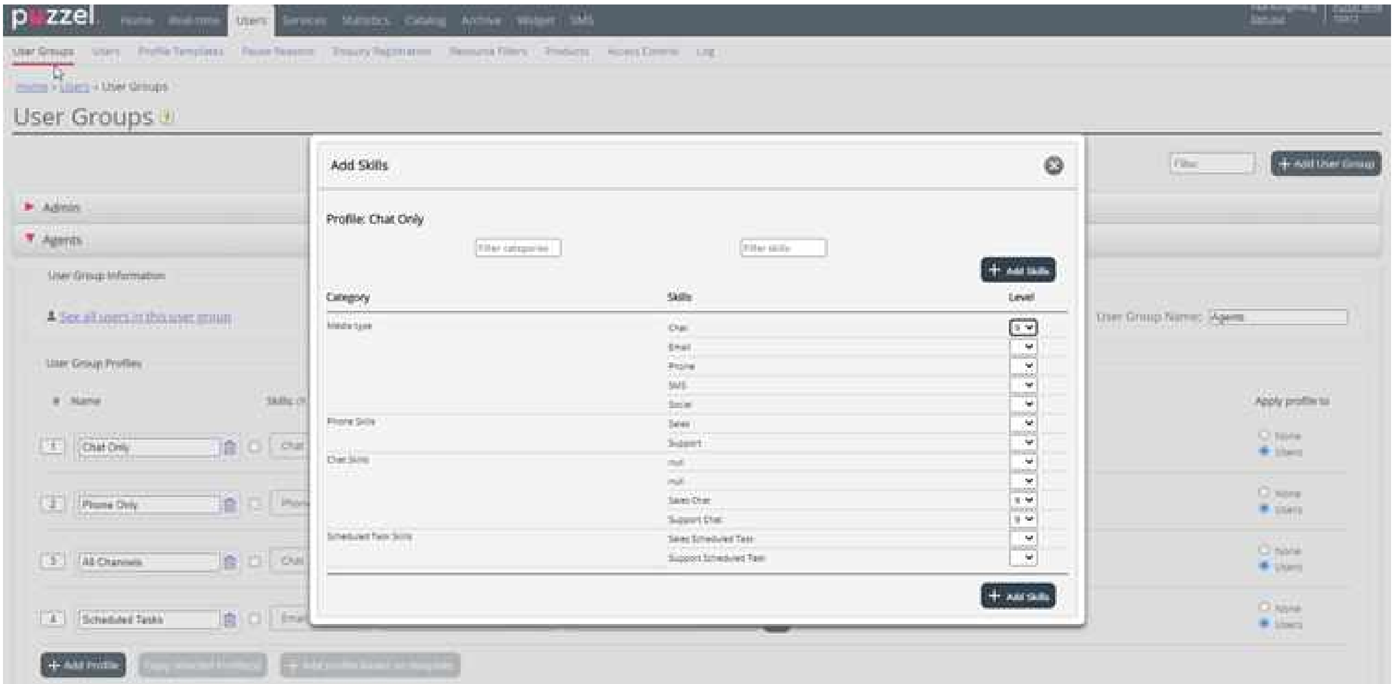
A. Add a profile and manually select the skills that should be included.

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 (edit) skills in the profile, clock 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 agents 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 agents 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 agents skill score is 18 on the Phone+Sales queue.

   You can use TAB (and Shift+TAB) to quickly navigate down (and up) the list.

   Click the + Add skills button when you are done editing skills in this profile.

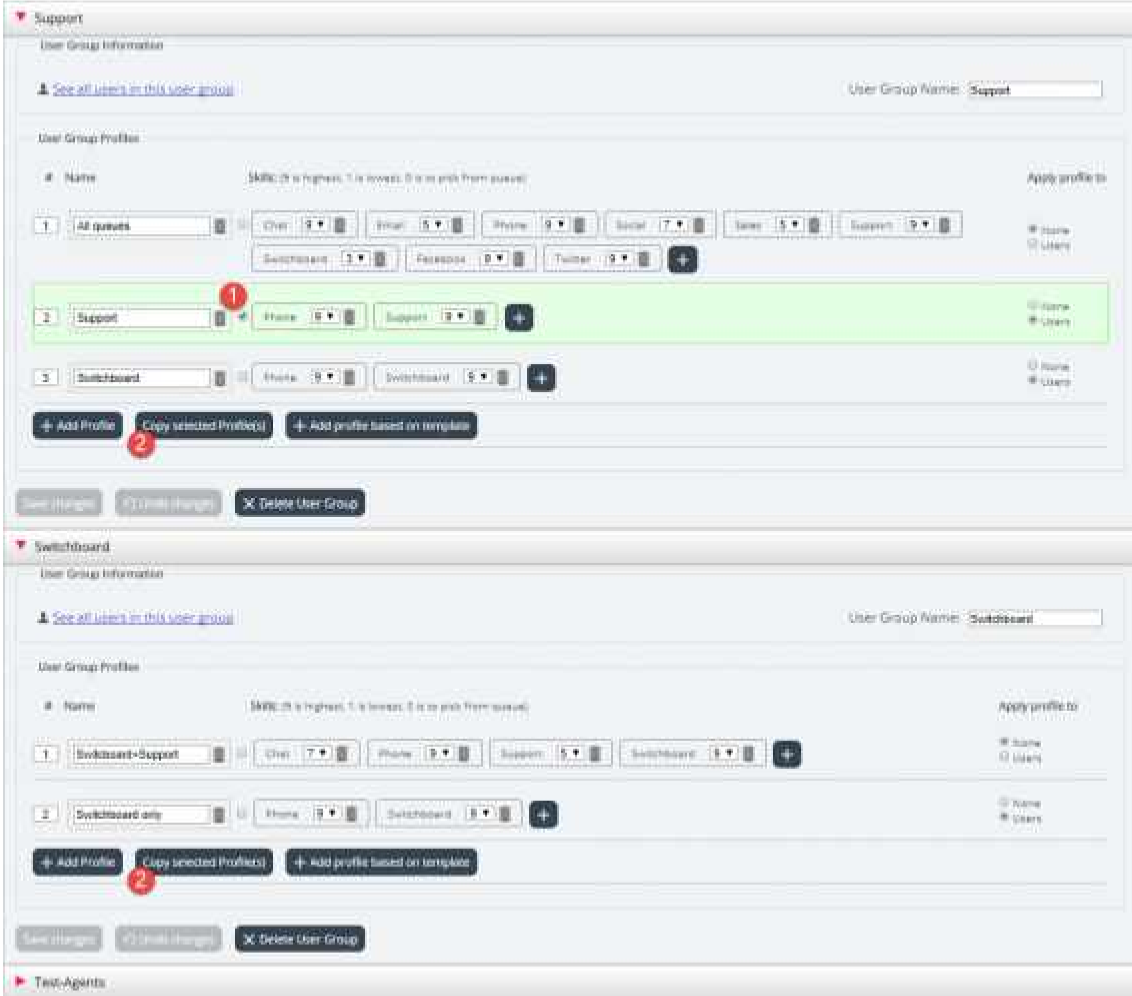
4. *Verify that the new/changed profile is OK before you click Save changes*

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 if.

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)).



When you click Copy selected profile, the profile is pasted into this user group. Before you save, you should change the new profiles 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 article [Users - Profile Templates] 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 templates name shown below the profile name.

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 todays profile number 3 to be number 1, you change its number to 1, and you must also change todays 1 and 2 to be number 2 and 3 before you click Save Changes.

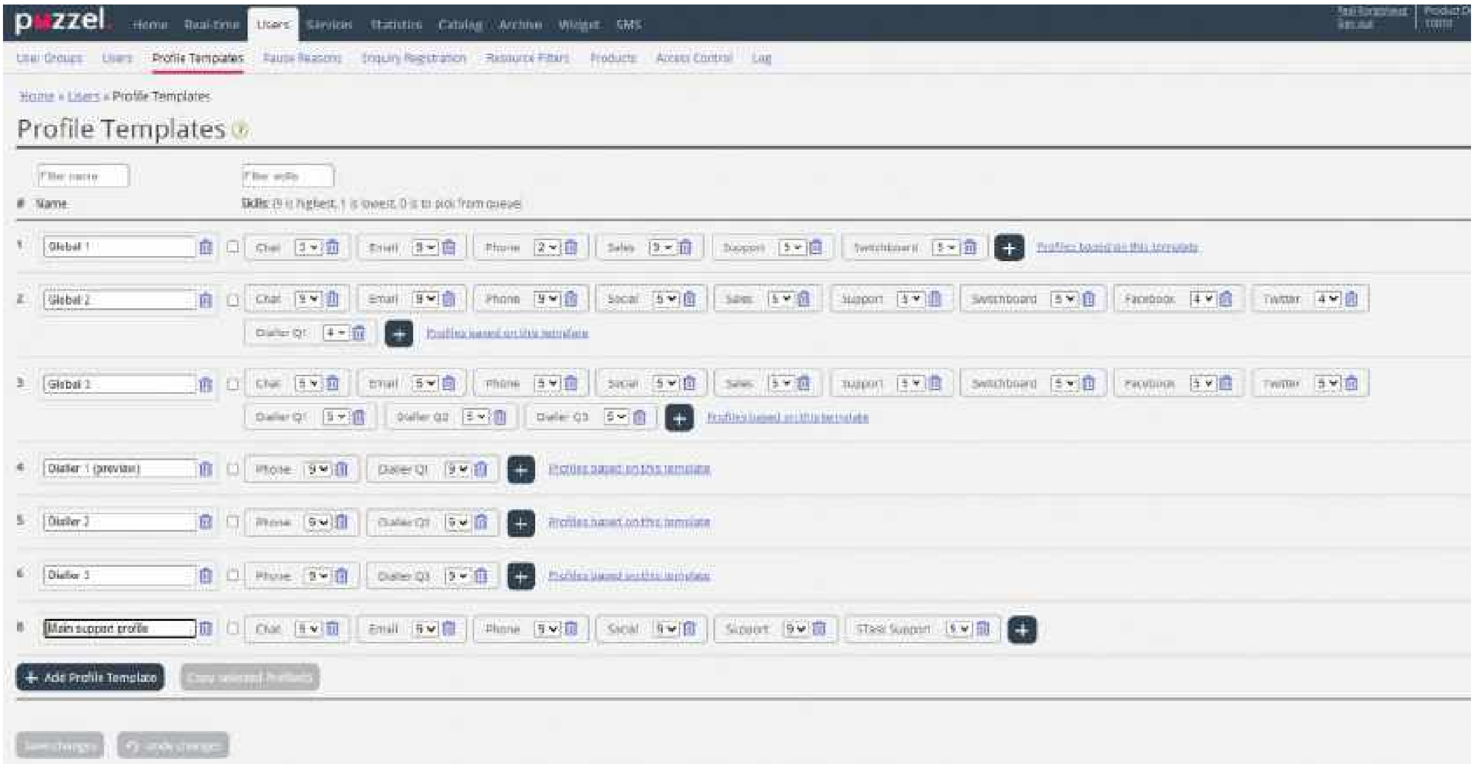
If you change group profile numbers, the profile numbers for the agents are updated automatically!

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.

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.



If you have lots of profile templates, you can use the filter input boxes to easily find the one(s) you look for.

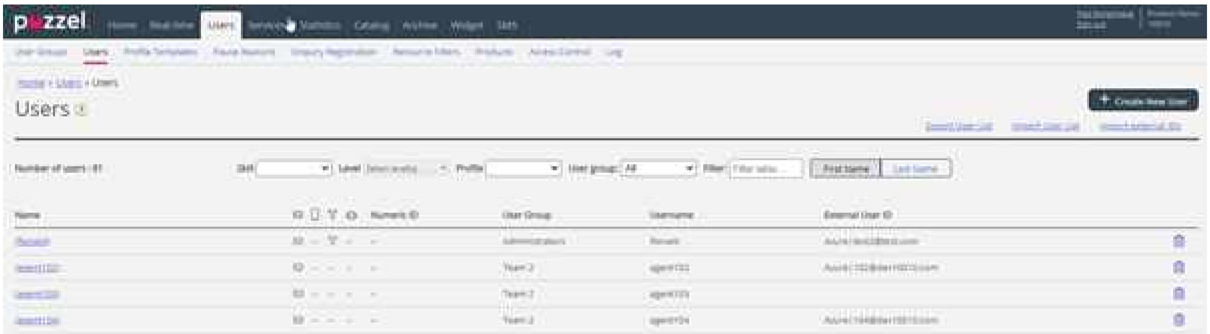
If you want to create a new profile template that is similar to an existing one, you can tick the check-box next to the existing profile template's name and click *Copy selected profile*, and then adjust the new one before you save it.

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

- If a templates **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 skills 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.

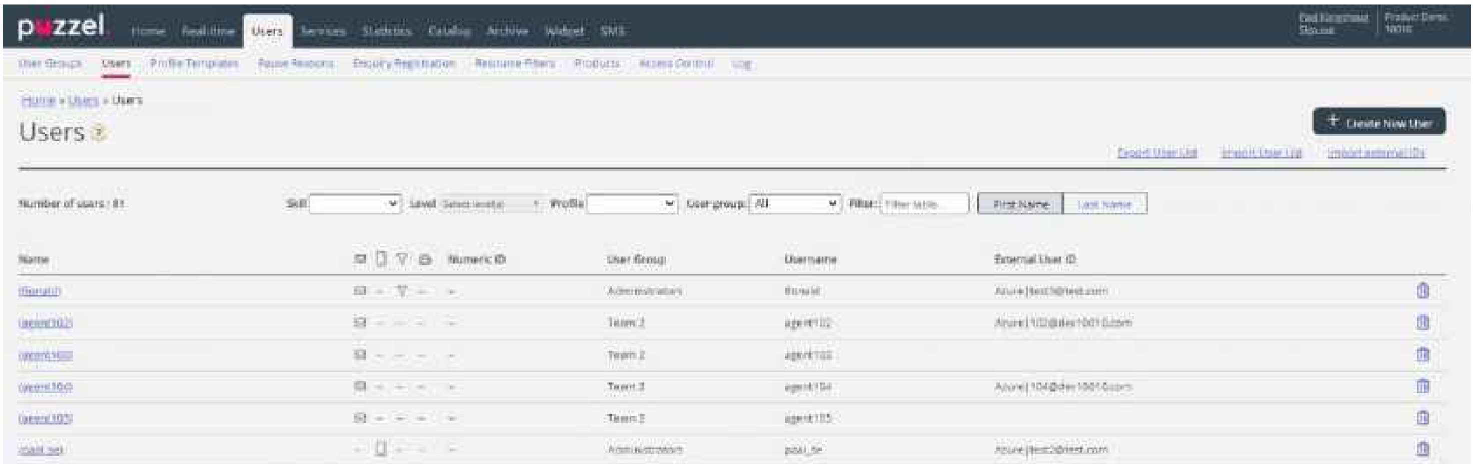
User management

This section explains how to create and maintain the Users in the Admin Portal of Puzzel Contact Centre solution.



User list and Edit user

On page 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, user name, 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.

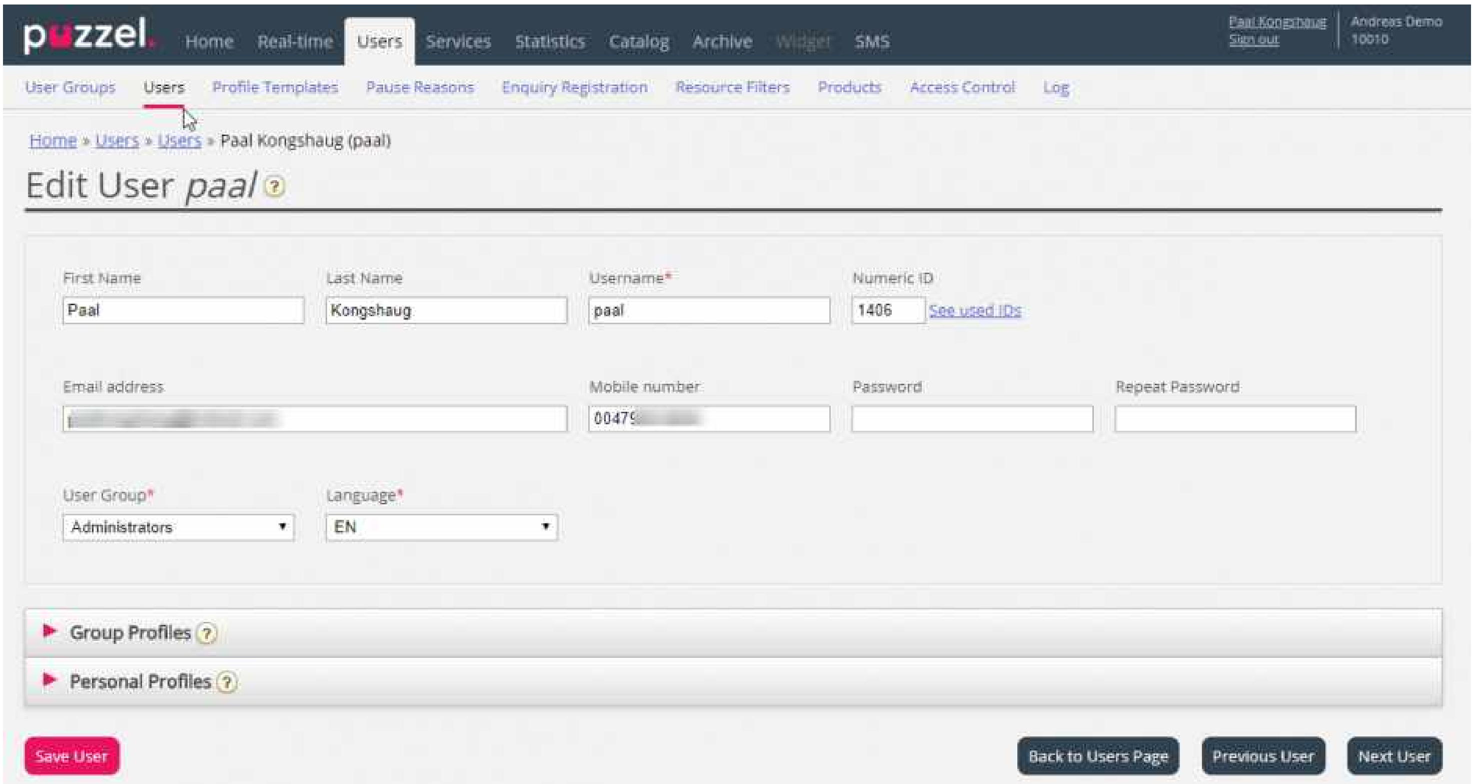
You can also search for users with a given skill and optionally specific skill levels in all or a selected user groups, and you can search for users with a specific profile.

The columns:

- ***Name****: If the users first and last name is entered, it will show in this column. Otherwise, the users username will show. Click on a users name to open the Edit user page for this user*
- ***Email****: Users with registered email address will have this symbol (and email address as tooltip)*

- ***Mobile**: Users with registered mobile number will have this symbol (and the number as tooltip).*
- ***Filter**: Users with resource filter(s) assigned to them will have this symbol (and filter name as tooltip)*
- **Bot**: Users that are bots (automated agents). Only Puzzel can mark a user as a 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*
- ***External_id**: The user's external id (for SSO), if any.*
- ***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

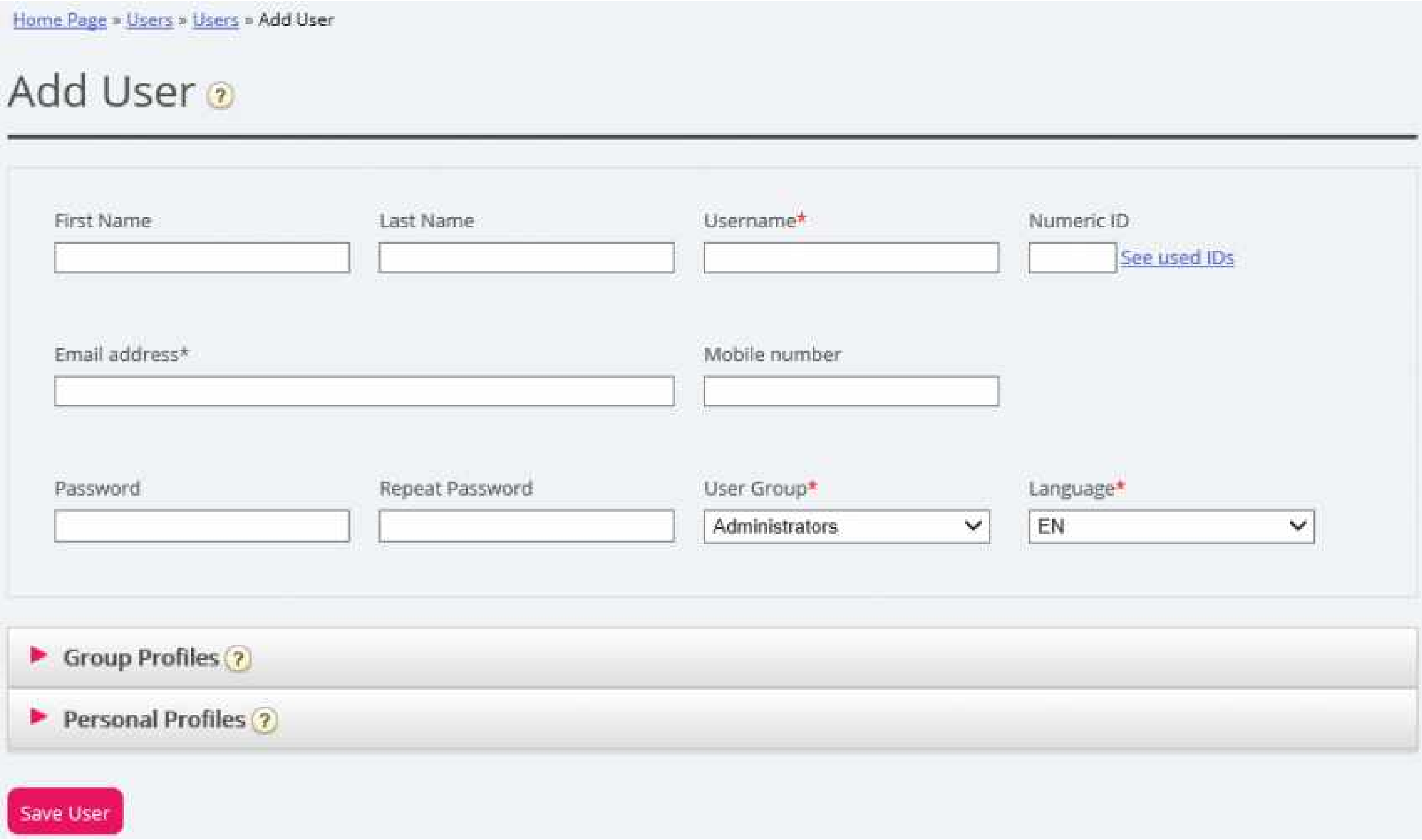
Click on *Group profiles* on the *Edit User* page to see the available group profiles for this user.

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.

Create New User

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

Note

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 all new users with an 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 their 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 (dont) 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 the 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.

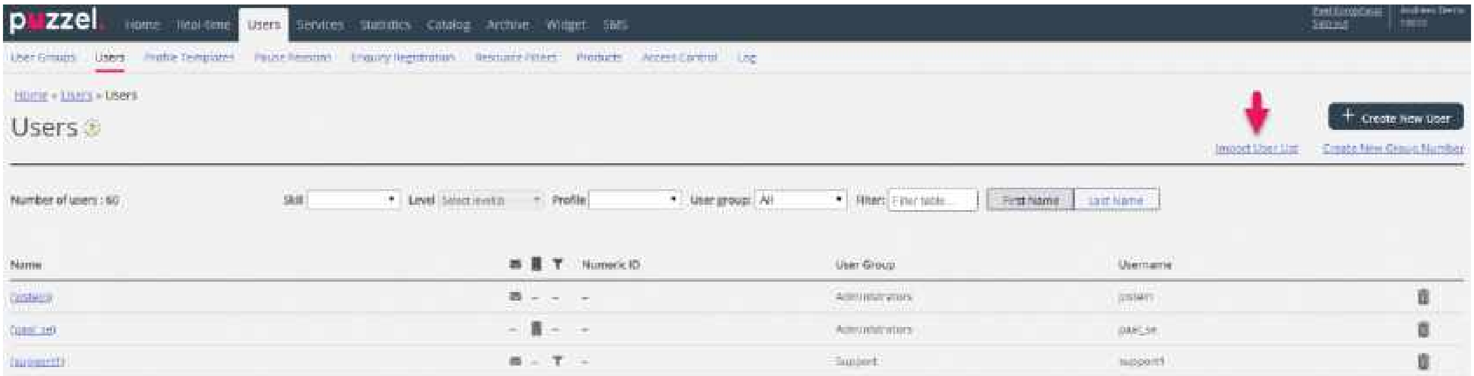
> Note
>
> If a user has been given a specific value for a property (e.g. Wrap-up timeout phone = 60 sec) instead of inheriting the user groups value, such a specific value on a user will be kept when the user is moved. The same applies to resource filters; If a user has been assigned a resource filter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

applied to the user if the user is moved to another user group.

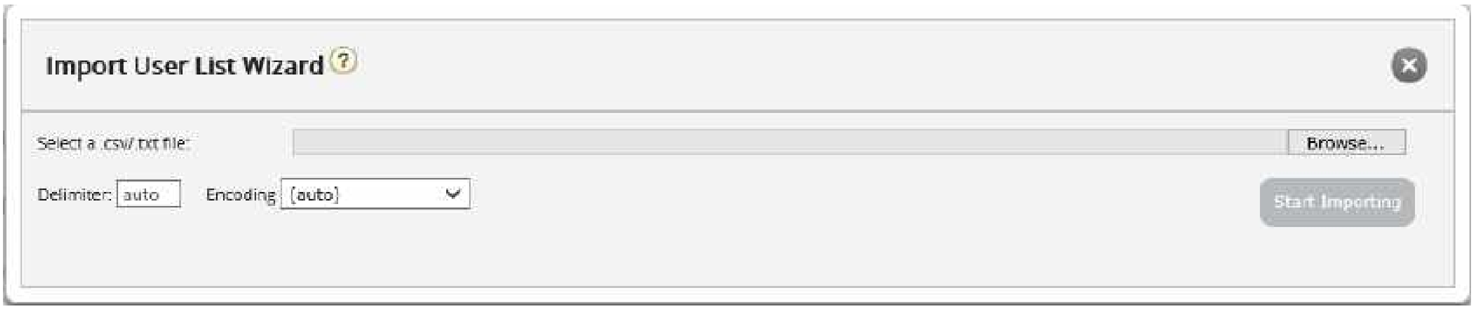
Also the API (UserUpdate) does not support to move a user to a new usergroup.

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*

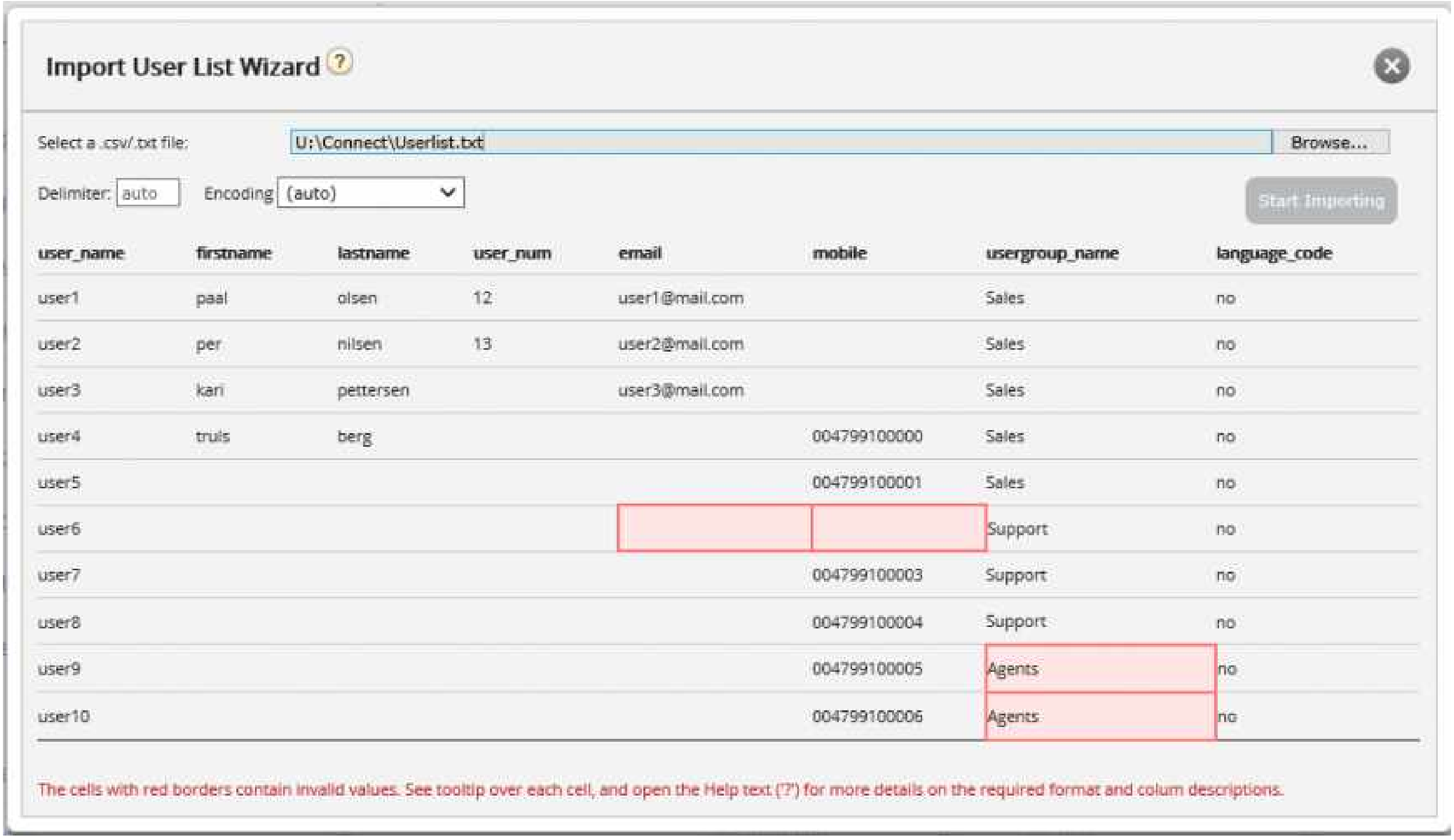


...to open the *Import User List Wizard*:



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.



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 can not be imported.

About the columns:

Column	Description
user_name	Required and must be unique within the customer (max 32 characters)
firstname	Optional (max 32 characters)

Column	Description
lastname	Optional (max 32 characters)
user_num	The Agent ID is shown in statistics(max 6 digits). Must be unique. Optional
email	On format *@*.*. Must be unique, and is needed for one-time passwords. Email address or 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.

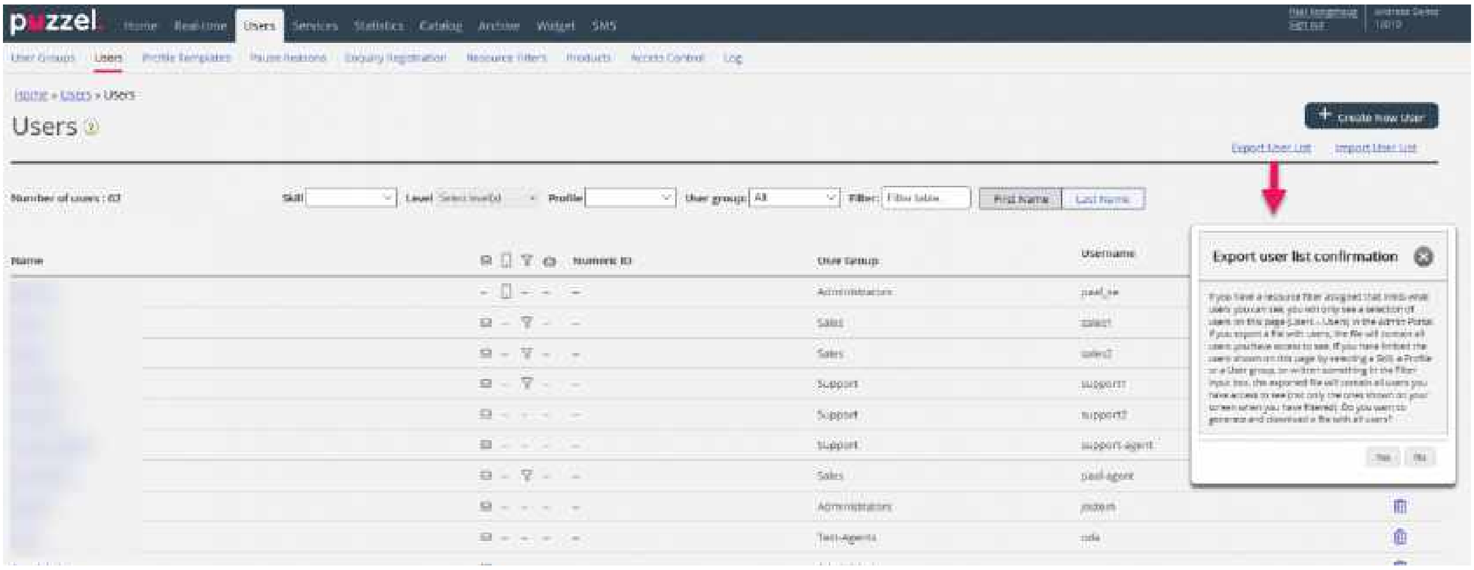
How to save numbers starting with 00 from Microsoft Excel

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).

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).



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.

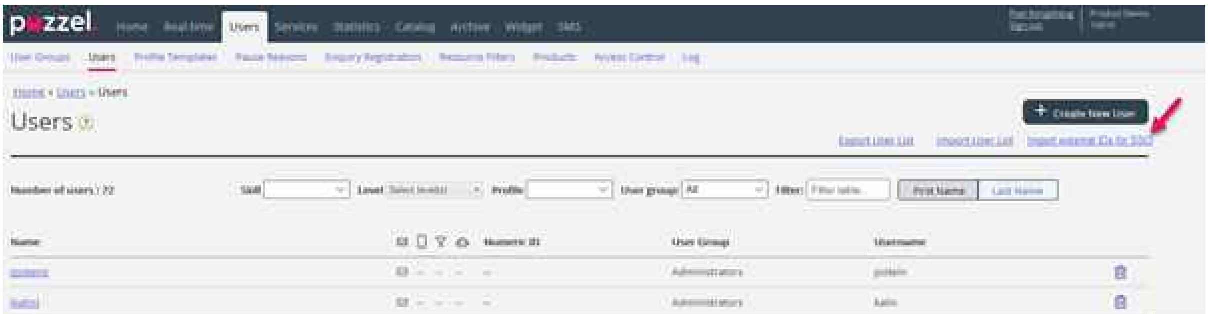
A Puzzel user with an Azure external id defined in Puzzel can use URL https://agent.puzzel.com?connection=azure to sign in to Puzzel's agent application without entering the Puzzel username and password.
Please note that we do not support SSO to https://admin.puzzel.com

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.

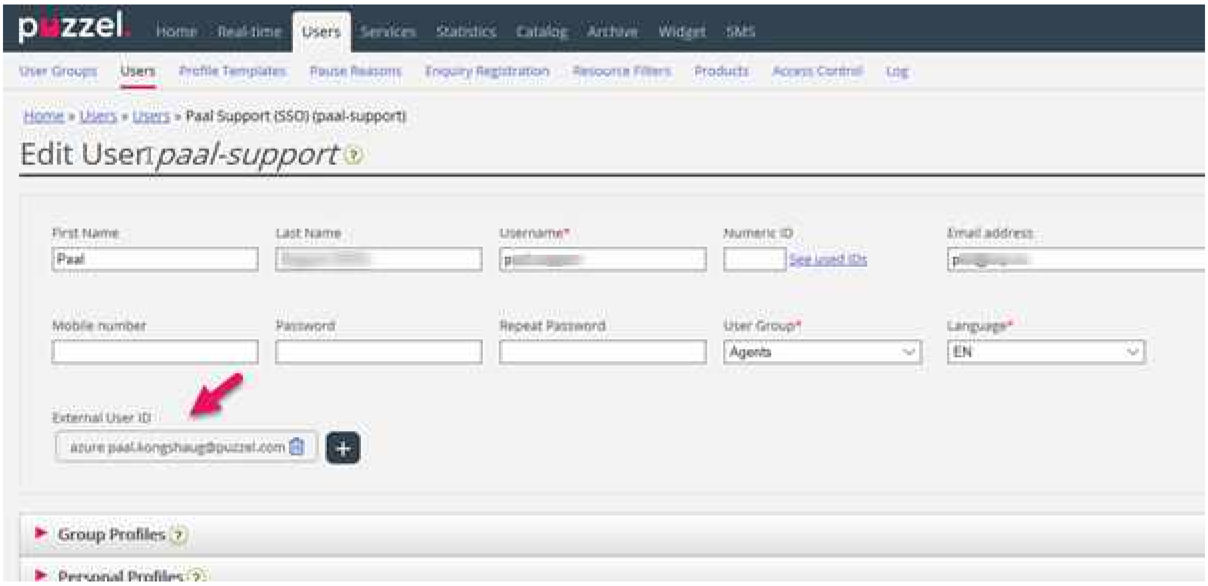
Then delete all columns except email and user_id, and make sure all rows (agents) you want to keep in the file have the correct external_id (email address). Then click Import external IDs to open the Import window, and then choose the file from your disk.

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. It 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.

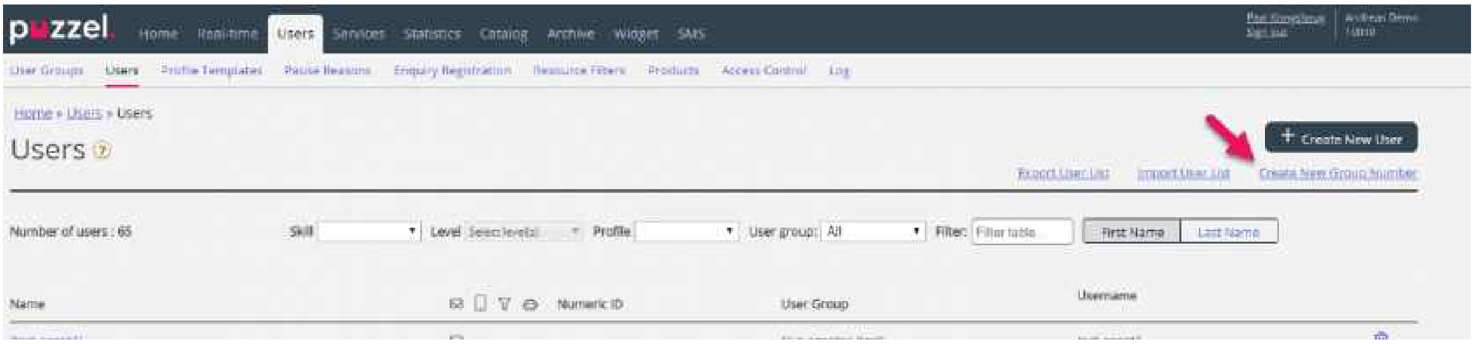
To configure Single-Sign-On to Puzzel with Salesforce (when Puzzel is integrated with Salesforce), please read this article.

Solving Customer Interactions

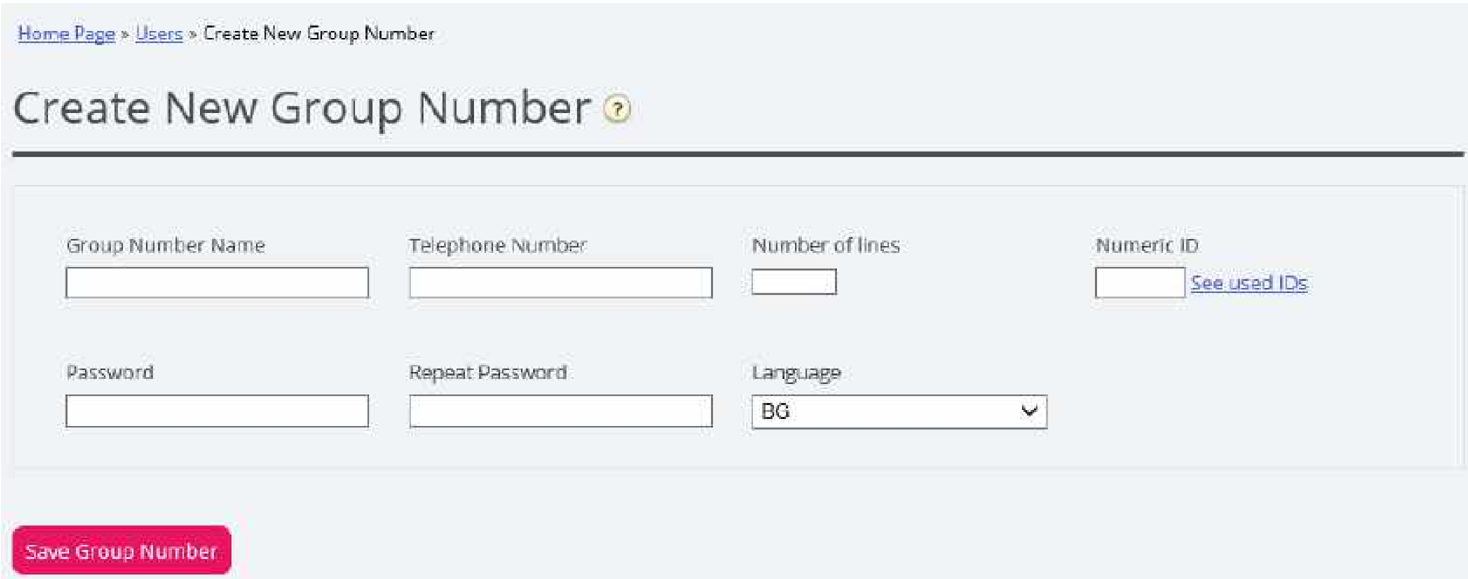
Create New Group Number

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

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



This page opens:



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 users 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.

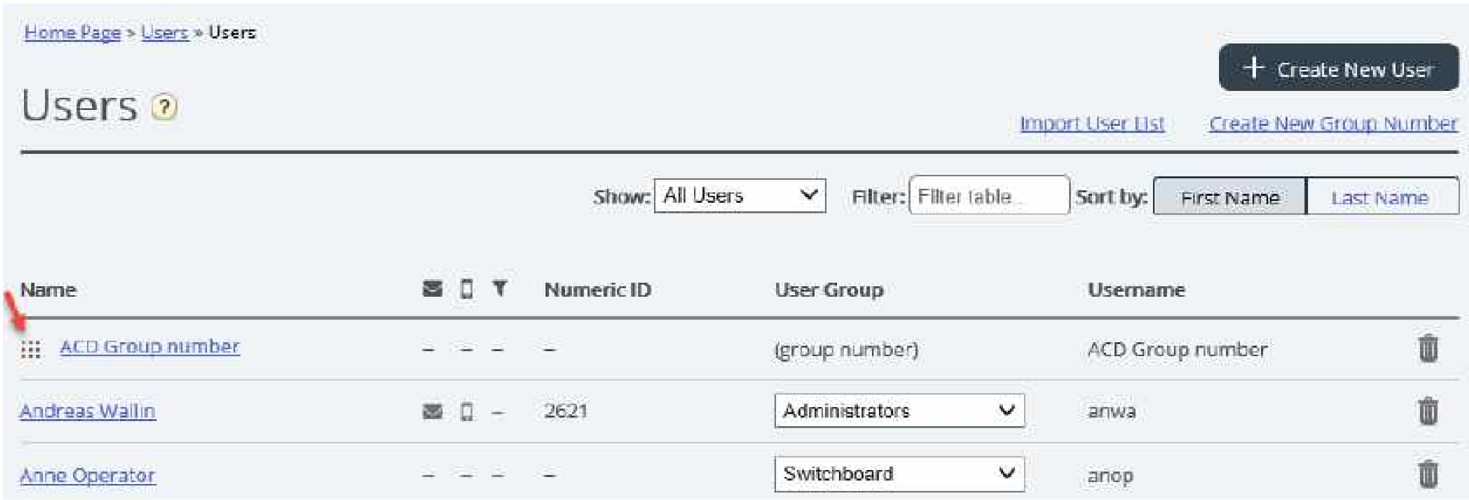
You can only define one profile per group number. Both ordinary agents and a group number (with several lines) can answer the same queue.

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.

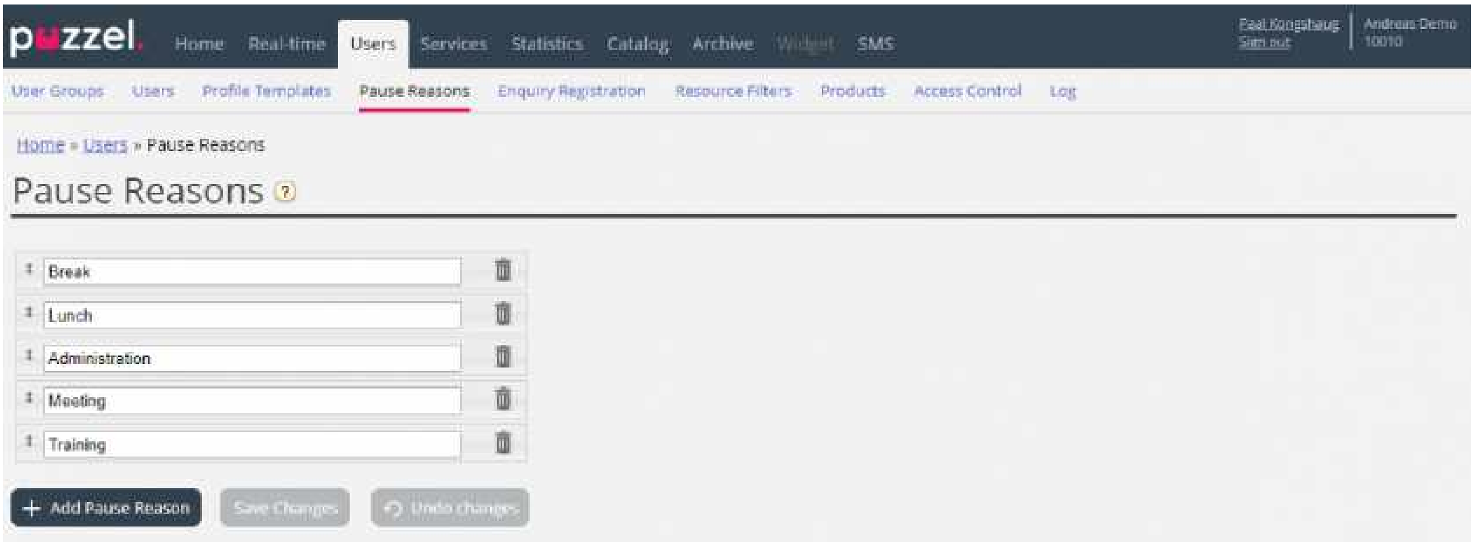
Example: With 10 agents behind the group number, 15-20 lines could be defined in Puzzel. If you are not certain how group numbers work, we encourage you to contact Puzzel support to help you out in creating one.

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
Users
Create New User
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

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.



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.

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, 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 that pause reason.

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 is not included in Wrap-up and AHT in Real-time Ticker nor in statistics or Raw data.

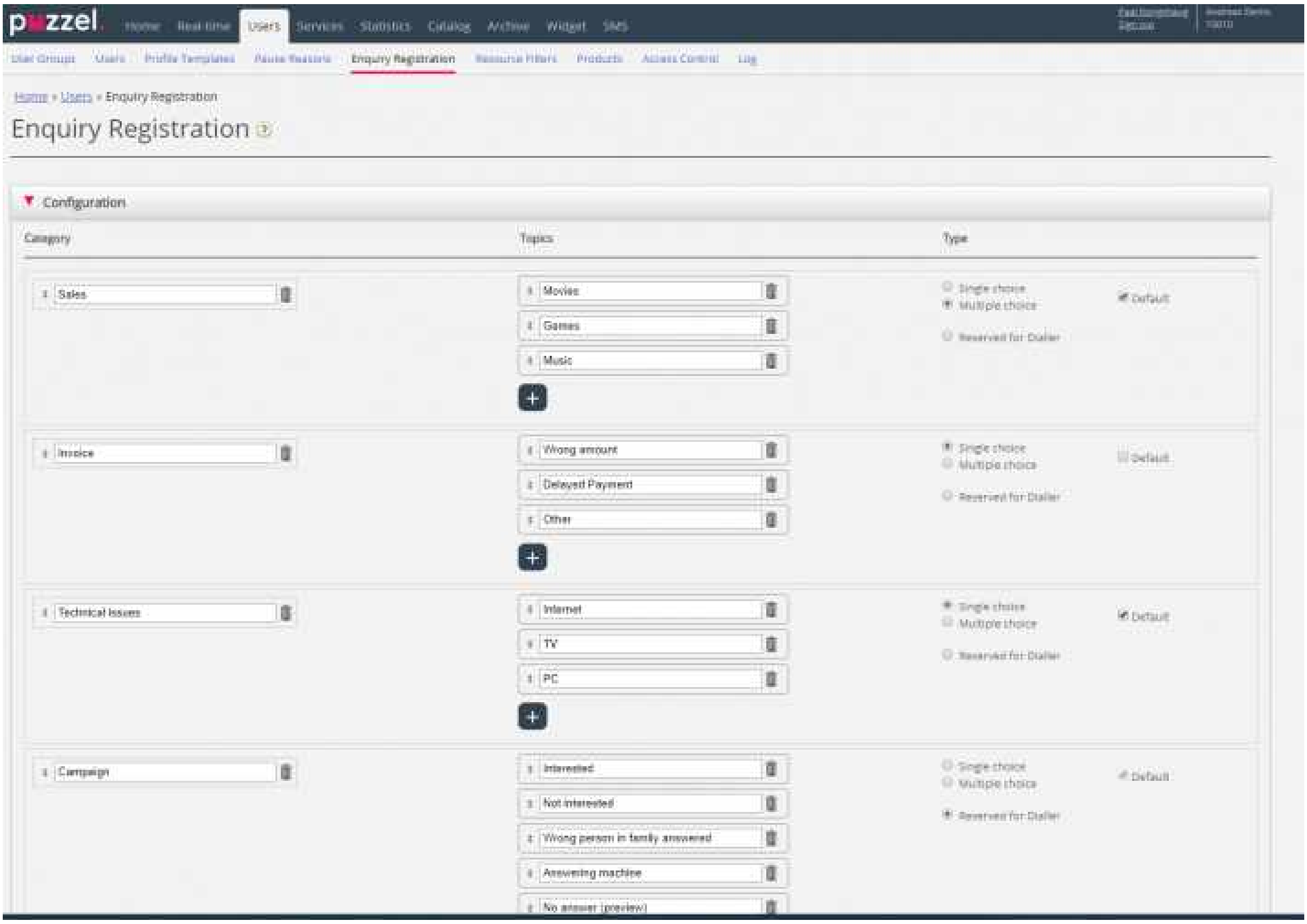
To minimise agent clicking, we recommend a quite long pre-defined wrap-up (e.g. 5 minutes) so that agents usually only need one click ("Ready") when ready for the next call. If the pre-defined wrap-up is short (e.g. 30 sec), the agent quite often needs to click "extend wrap-up" before wrap-up ends, and then click ready when ready. And if the agent forgets to extend wrap-up before the wrap-up ends, they receive a new call when they are not ready to answer.

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 of 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 agents 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.

Forced Enquiry Registration

Agents can do Enquiry Registration, but its 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 agent.puzzel.com, the agent can not close the **call's** request tab if a registration is not done, even if the call's wrap-up has ended.

The agent cannot close the request tab for a chat/email/social request unless a registration is done.

Its 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.

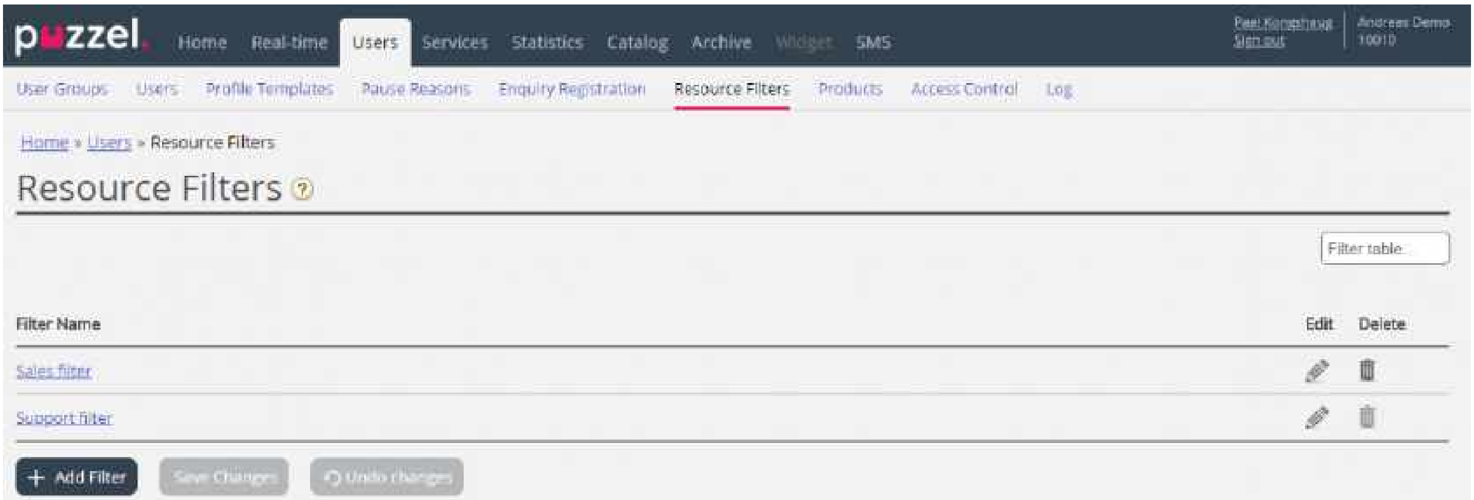
If you start using Forced Enquiry Registration, we recommend you create an Enquiry Registration Topic called e.g. Consult call or Other so that agents easily can register something after having answered a consult call.

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 to the selected user group(s)****/users (Users - Access Control)*

Resource filters:



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 users 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.

Creating a New Resource Filter

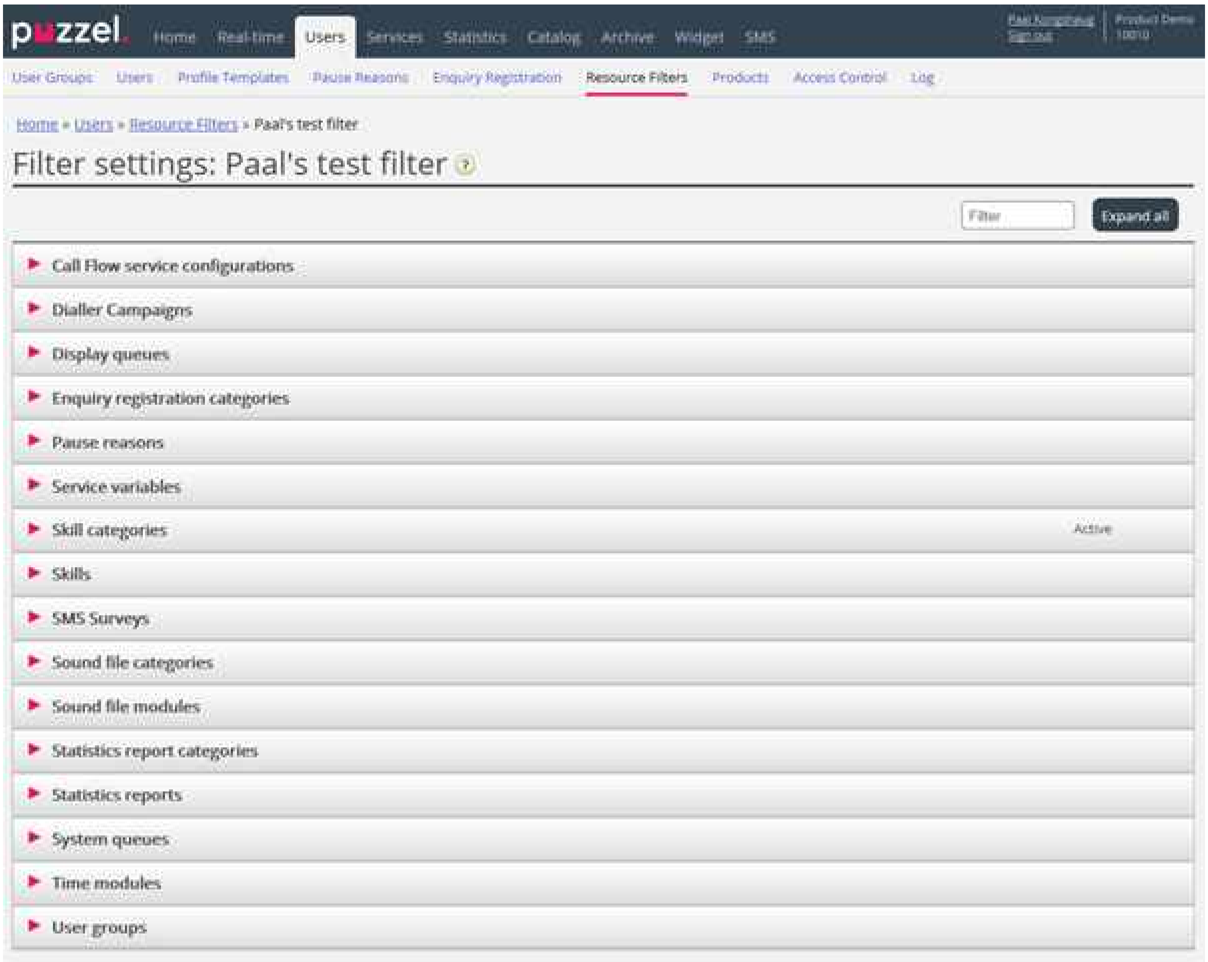
Click Add Filter, write a descriptive name for the new filter, and then click Save Changes.

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

Click the garbage bin icon to delete a filter.

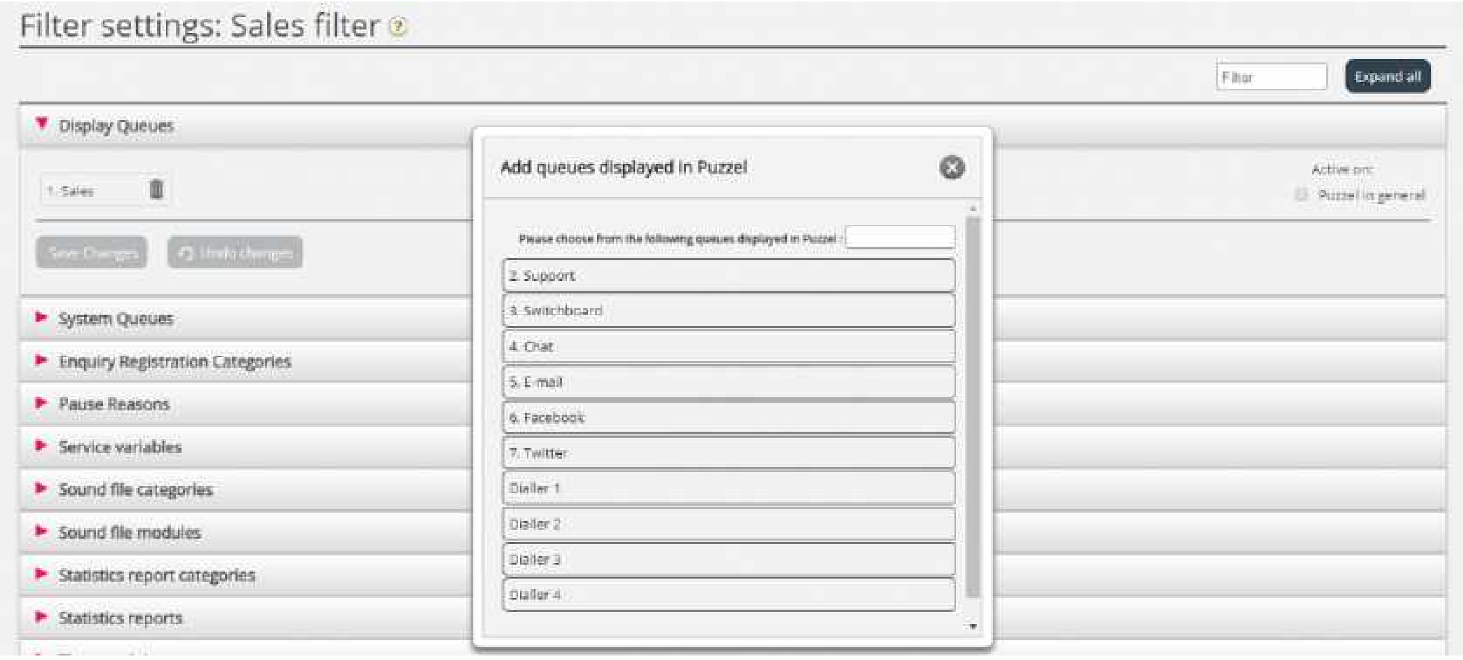
Defining Resource Filter Content

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

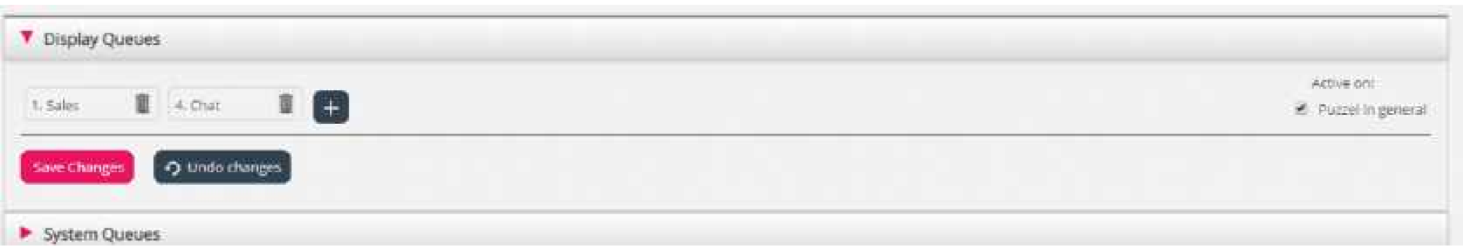


When you click on an area in the filter, e.g. Display queues, it opens, and you can see elements already included in the filter (none for a new filter).

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

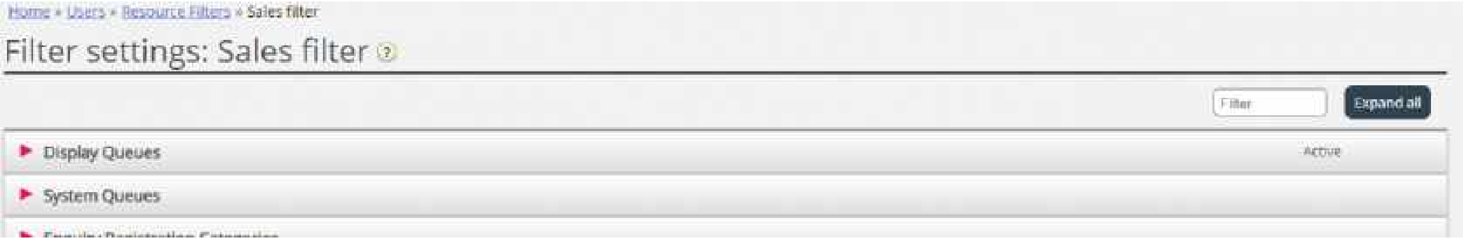


To add an element from the list to the filter, simply click on the element (and it disappears from the list containing available elements). When you have added the relevant elements, click x to close the window. The chosen elements will now be shown:



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*).

Resource Filter areas

This section has short articles about different areas from which you can restrict certain users or user groups access to different elements of Admin Portal and Agent Application. Browse through the next few sections[see the index tree on the left] to know more about each Resource Filter areas

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.

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.

Solving Customer Interactions

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.

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.

Enquiry registration categories

If your Puzzel solution uses Enquiry registration, all agents will see all categories defined in the Agent applications 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 can not 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.

Pause reason

If your Puzzel solution uses different **Pause reasons**, all agents will see all the defined pause reasons in the Agent applications 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.

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.

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.

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.

Sound file modules

If one or more of the few users with access to **Services->Audio** should only see a few of your services 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.

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.

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.

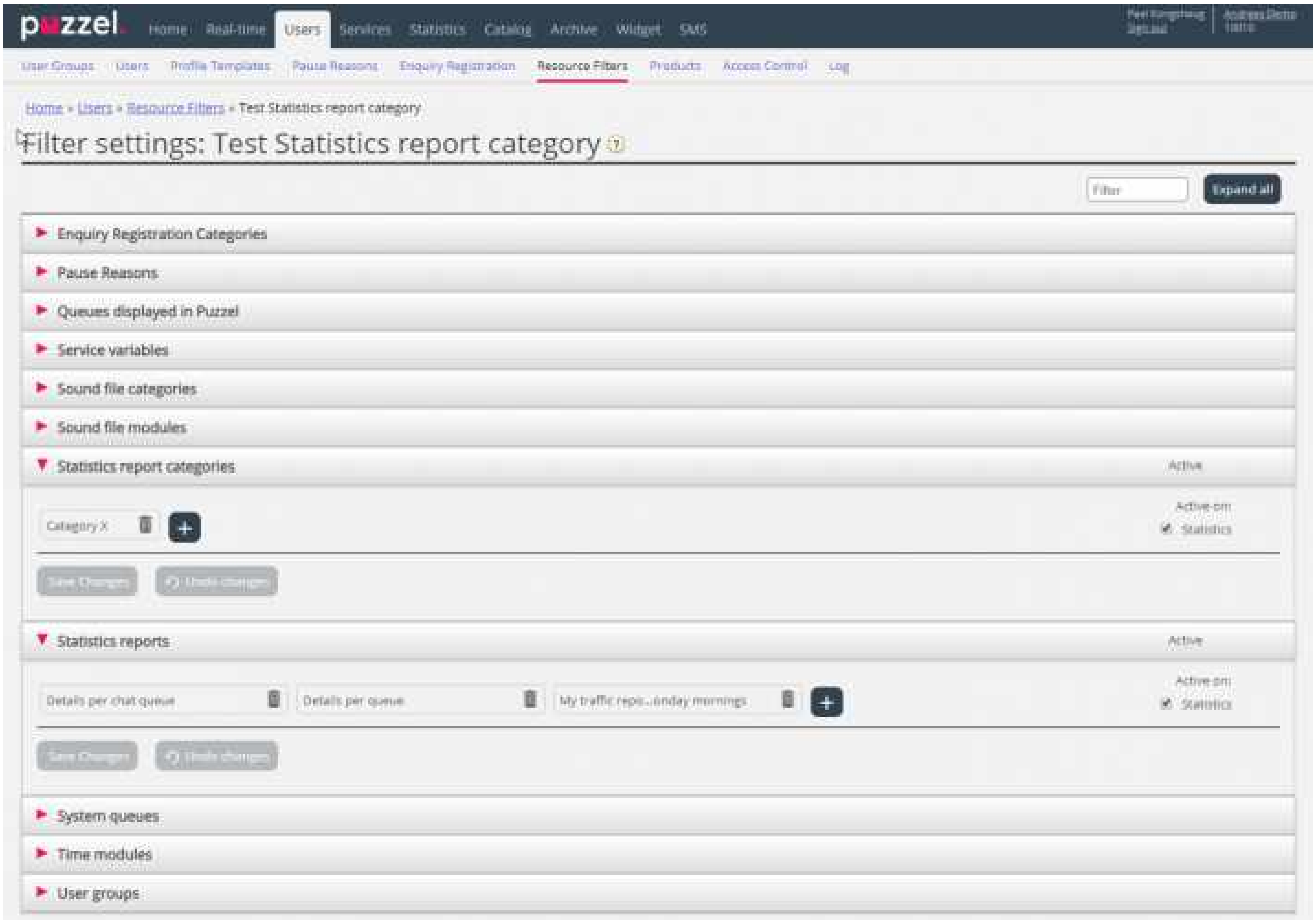
Please note that if a user has such a filter assigned and then saves a customised report, this new report will disappear when its saved, since this new report is not included in the filter! We recommend that users with a statistics filter assigned do not have access to save customised reports to avoid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

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.

Solving
Customer
Interactions



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.

User Groups

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

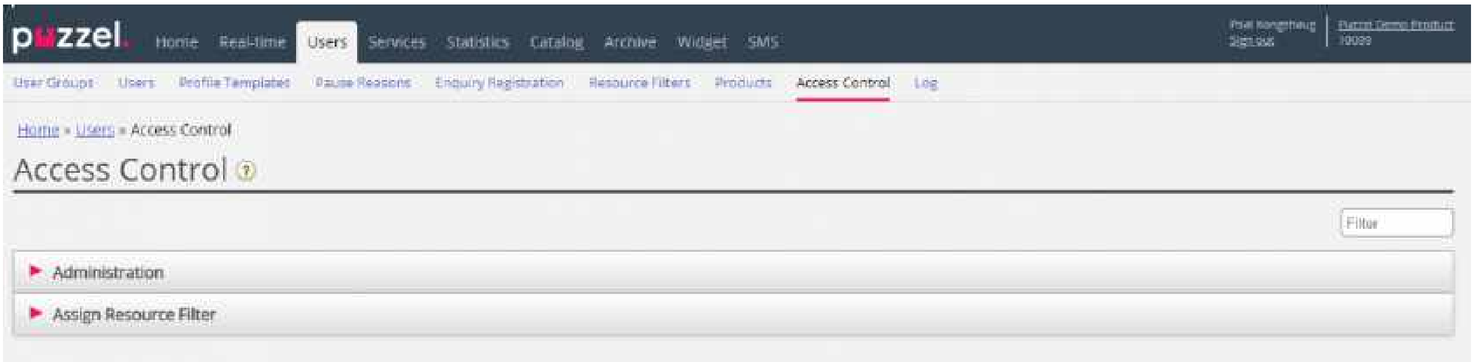
Active on:

- 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 Portals 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.

Note

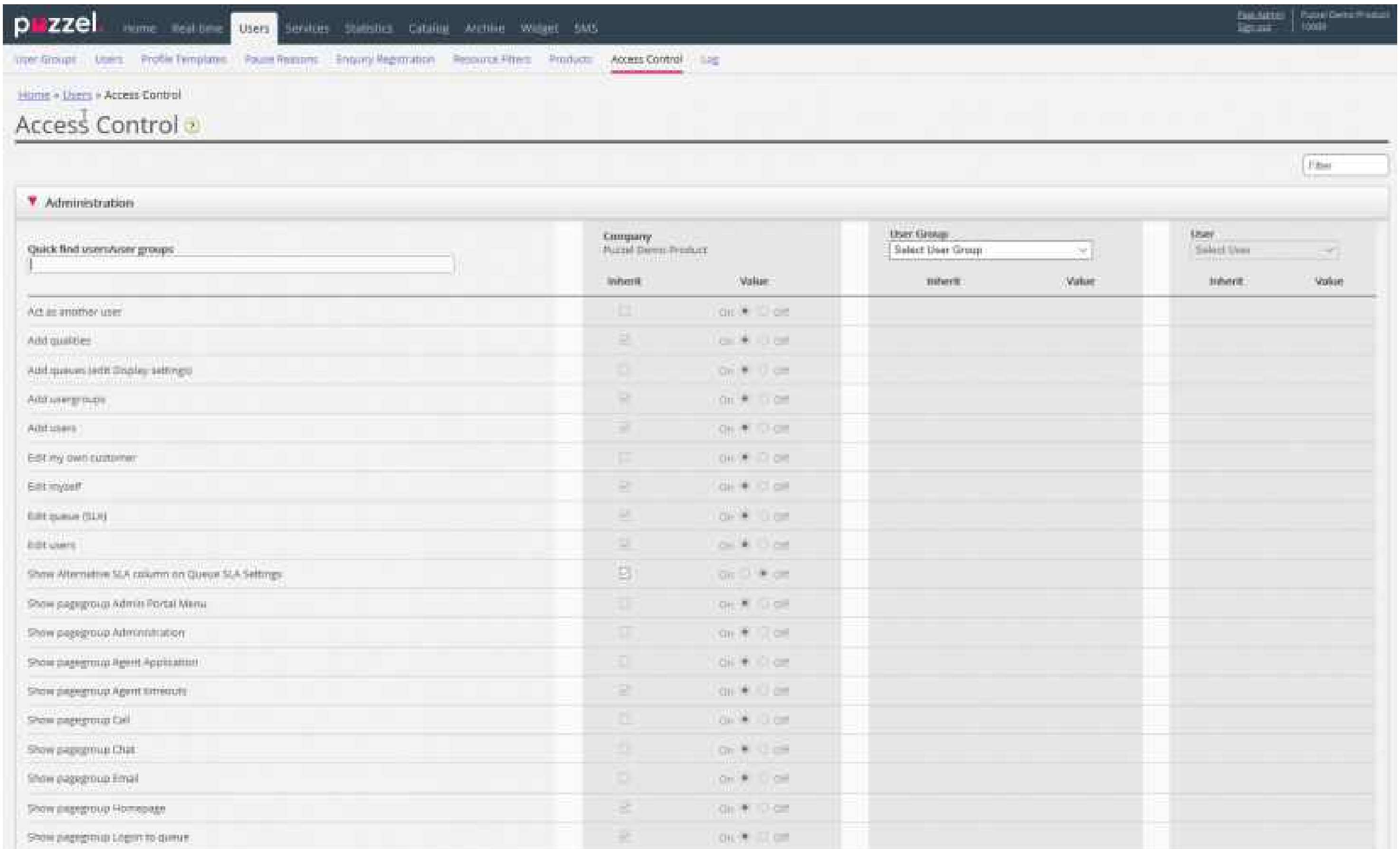
One incoming call may have been connected to different agents on different system queues due to call transfer. If an incoming call includes an agent conversation the user should see, the whole calls General information will be shown, but the user will not have access to call recordings from queues/agents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

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



Administration

The few users (main admins) 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 Administration properties that are ON for you company, and some selected ones that are OFF by default (e.g. Add system queues and Add Service variables).

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 Administration.** The 'main admin' switch. If ON for a user, this user has access to Users - Access control - Administration, but only if Edit my own company also is ON.

- **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.
- **Add Service variables:** Default OFF. If On for a user, this user can see accordion Add servive variables on page Services - Service variables where new variables can be added (and existing one edited/deleted).
- **Save custom statistics reports**: Default ON. If Off for a user, this user can still customize reports, but <u>not save</u> 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*.

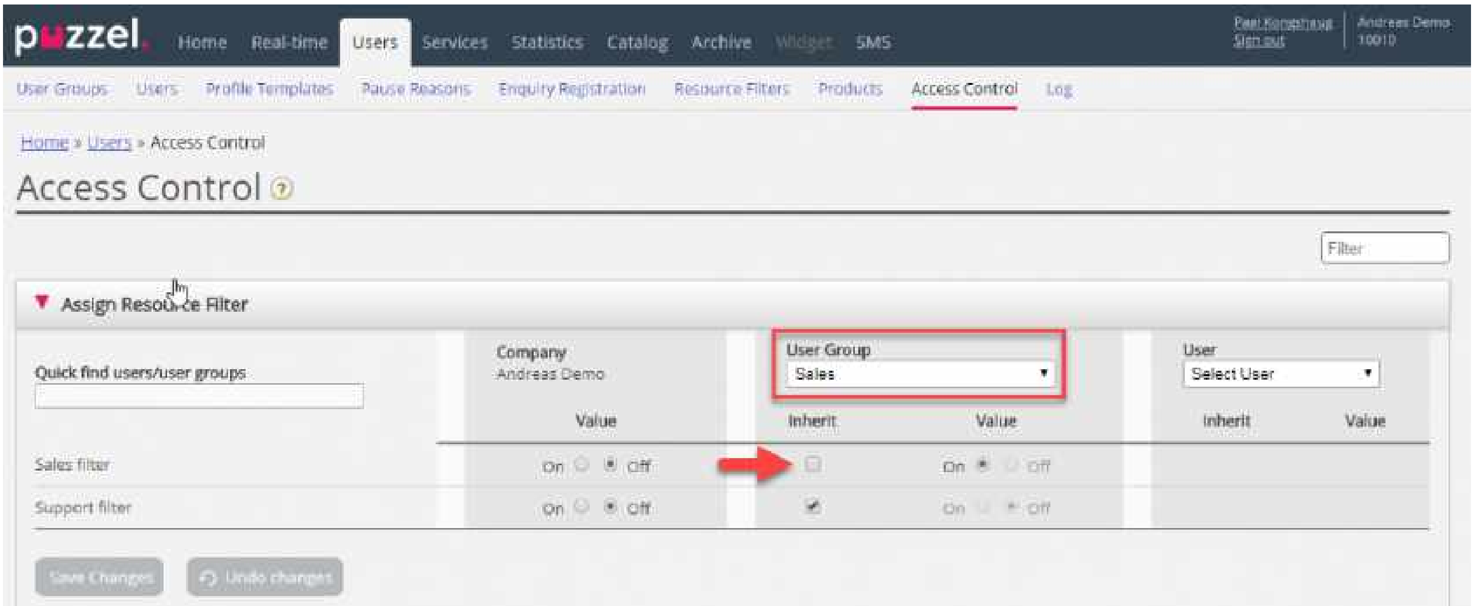
- **Show profiles on Edit user page**: Default ON. If Off for a user, this user will not see profiles on the Edit user page.
- **Show Group numbers ('Unblockable agents')**: Default OFF. If ON for a user, this user can see, edit and Add Group numbers.

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.

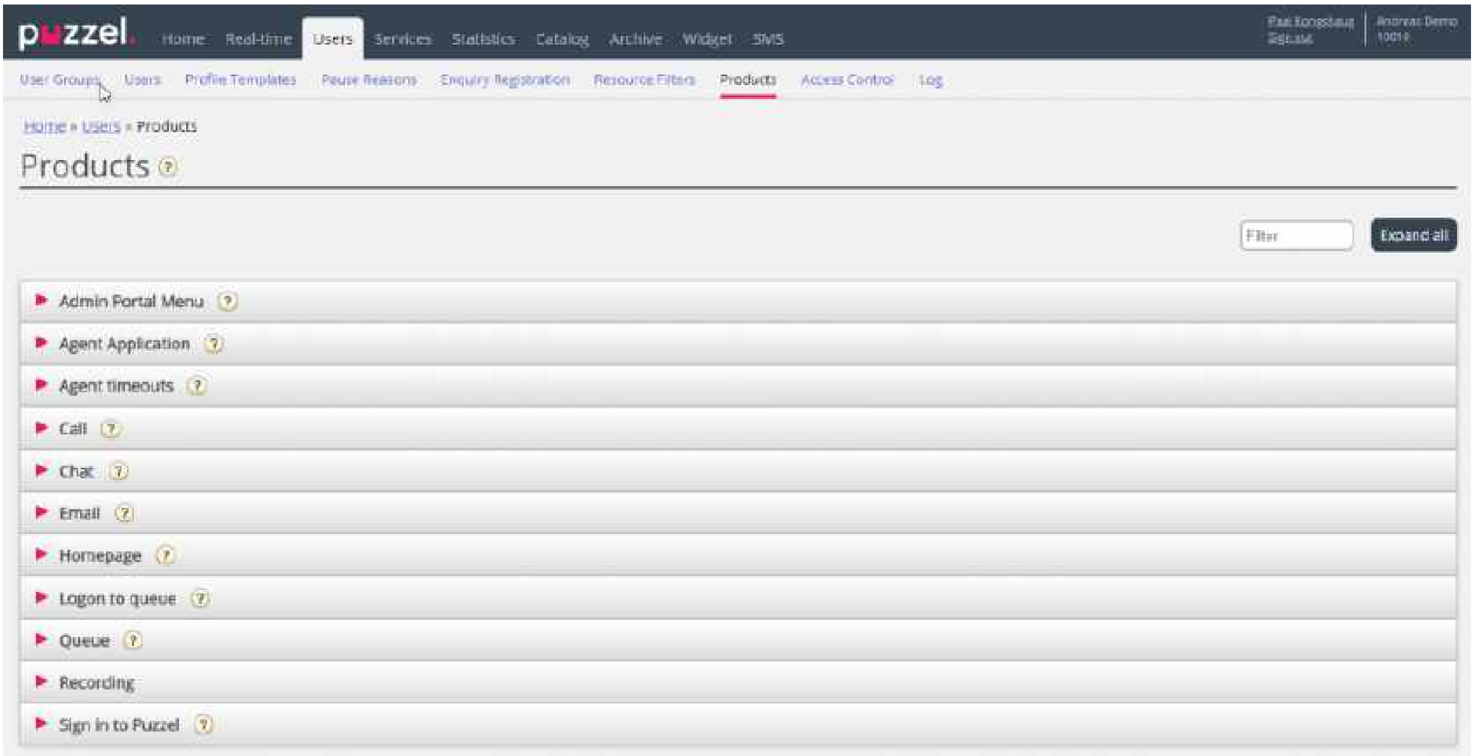
Please note that you can not set value OFF for a user group (or a single user) if the value on the Company level (or user group level) is ON.

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

Solving
Customer
Interactions

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):

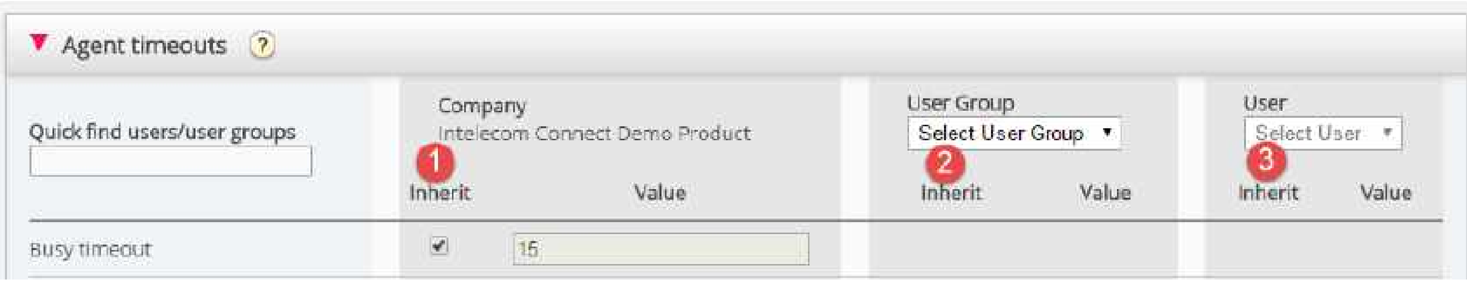


Some customers see several product areas, and others see few.

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

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.



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

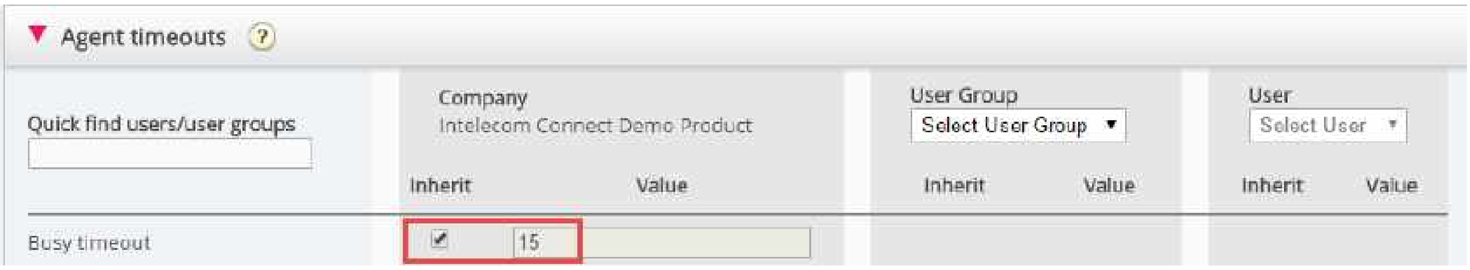
3. **Inherit on User level** By default, all users will inherit the configurations from the user group they belong to. If a user should have different values than the user group, choose the user, untick the inherit box and set the desired values you want for that user

Note

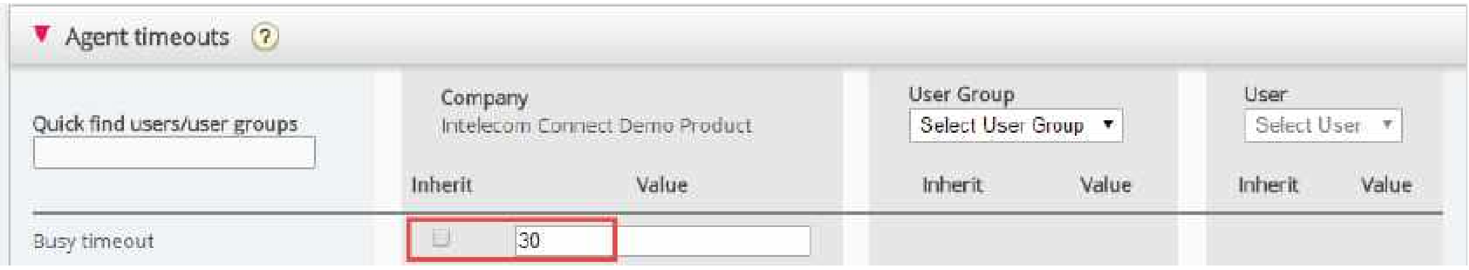
Please note that if you for a single user uncheck *Inherit* and set a specific value for a property (e.g. set *Wrap-up timeout phone* to 60 sec), and you later **move** this user to another **user group**, this users specific value for this property is kept. In general, we do not recommend adjusting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

Example:

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

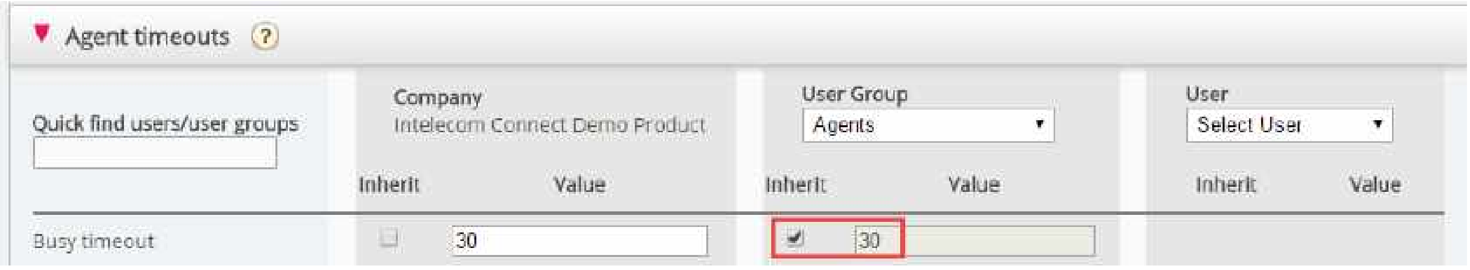


If your company wants another value for Busy timeout, untick *Inherit* and enter your own value, e.g. 30, and save.

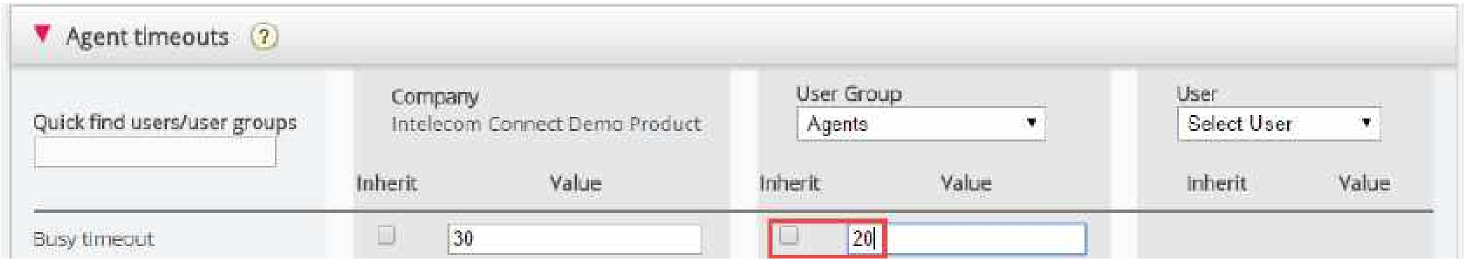


Now 30 is your Company value that is inherited to all you user groups.

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

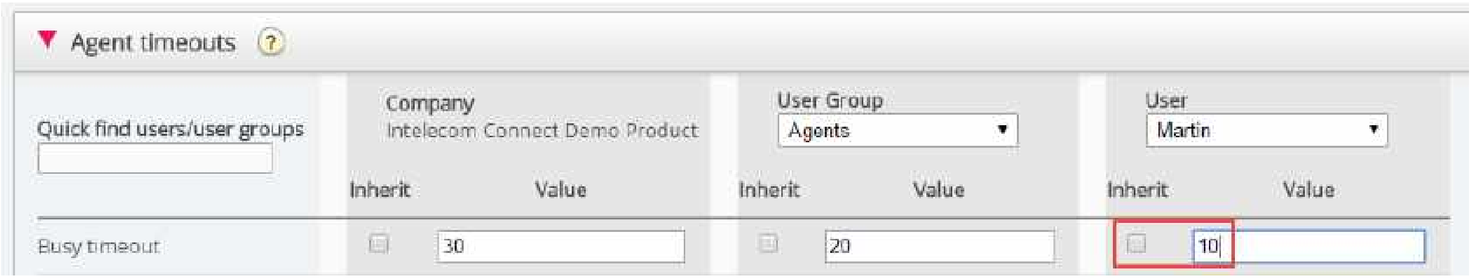


Then untick *Inherit* for the user group and enter a new value (e.g. 20):



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

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



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

Different property types

The most important property types are:

1. 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 its inherited ON for a user group, you can uncheck *Inherit* and select OFF for a user in this group.

2. 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.

3. 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.

Admin Portal Menu

If you want to change what **main 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.

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

You cannot see or turn ON menu properties that are OFF on the company level, and the main rule is that if a menu property is OFF for a user group, you can not turn it ON for a single user.

However, there are some exceptions. Some menu properties are shown on company level also when OFF, and these can be turned ON for a user group or for a single user when OFF on the level above (to make it easier to selected users only access):

- Enable menu Users - Access control
- Enable menu Users - Resource filters
- Enable menu Services - Chat
- Enable menu Services - Social

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 chapter *Add User Group*.

Agent Application

There are several properties that control how things should appear in the gent 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 cant 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 applications Queue overview.

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*.

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

queue with a predefined wrap-up time, the queues wrap-up time is used instead of the wrap-up pre-defined on this agent.

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 agents 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 is 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 the 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 the 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 callers number when offering a call to the agent. This property is not visible for customers, only for Puzzel support.

Chat

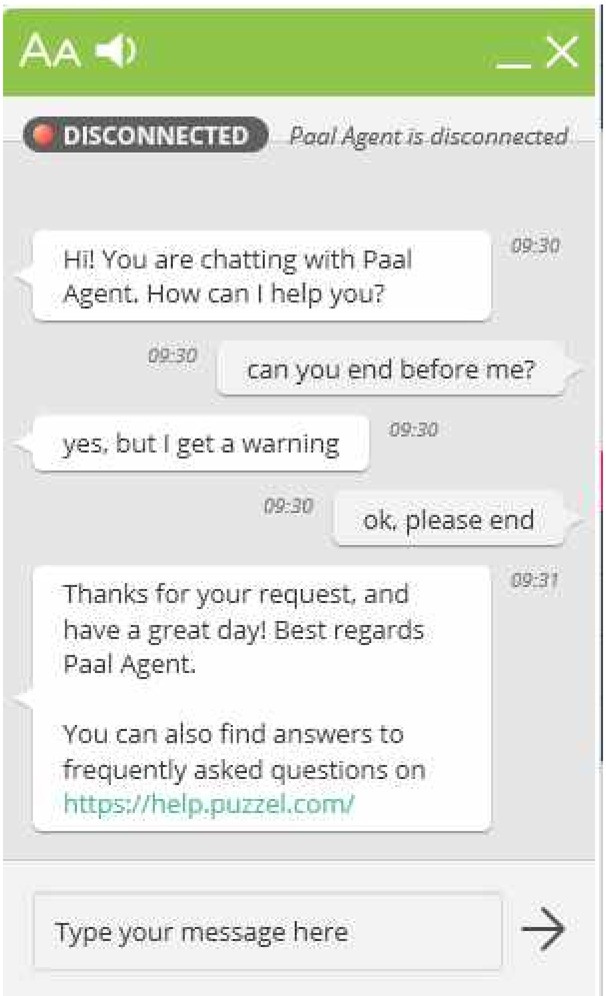
You can configure various properties for Chat and written requests here, e.g:

- **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 <u>total</u> concurrent written request (max 8):** Maximum number of concurrent written requests that can be allocated to the
- **Maximum total concurrent written requests (max 8) - <u>adjusted</u>:** 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 <u>chat/social</u> 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 <u>email/etask</u> 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 a 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 agents status will be shown as *Ready (n)*.
    - When the agents phone is blocked (due to >X ongoing written requests) the agents 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 here, this message will be shown for the chatter just 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 also find answers to frequently asked questions on [url]https://help.puzzel.com/[/url]
Since the agent now has disconnected, the chatter cannot write any text in the input field.

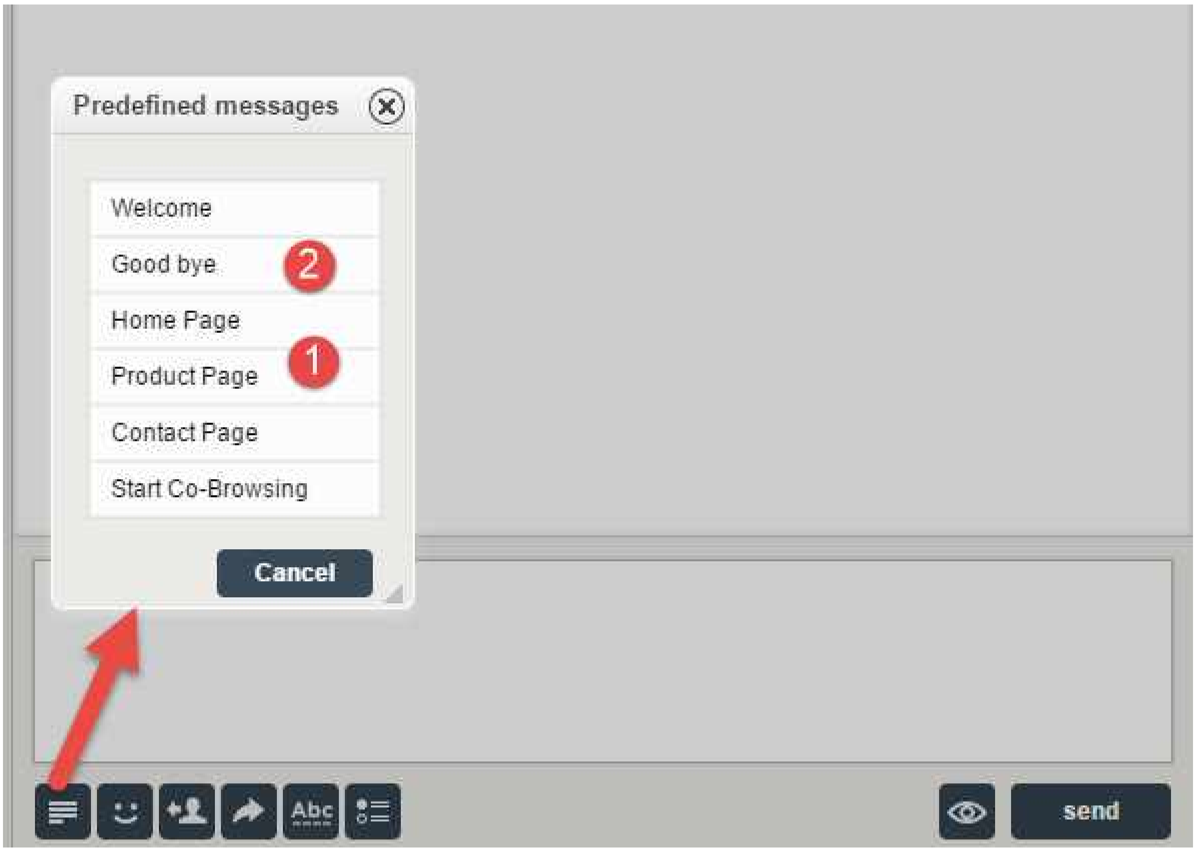
- **Pin chat intro field (if available)**: If ON, the initial text from the chatter (name etc) is pinned in the upper part of the chat. Each agent can turn on/off Pin chat intro message, and the current choice is shown here.
- Enable Chat Survey: If chat survey is configured on your web page, the survey 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.

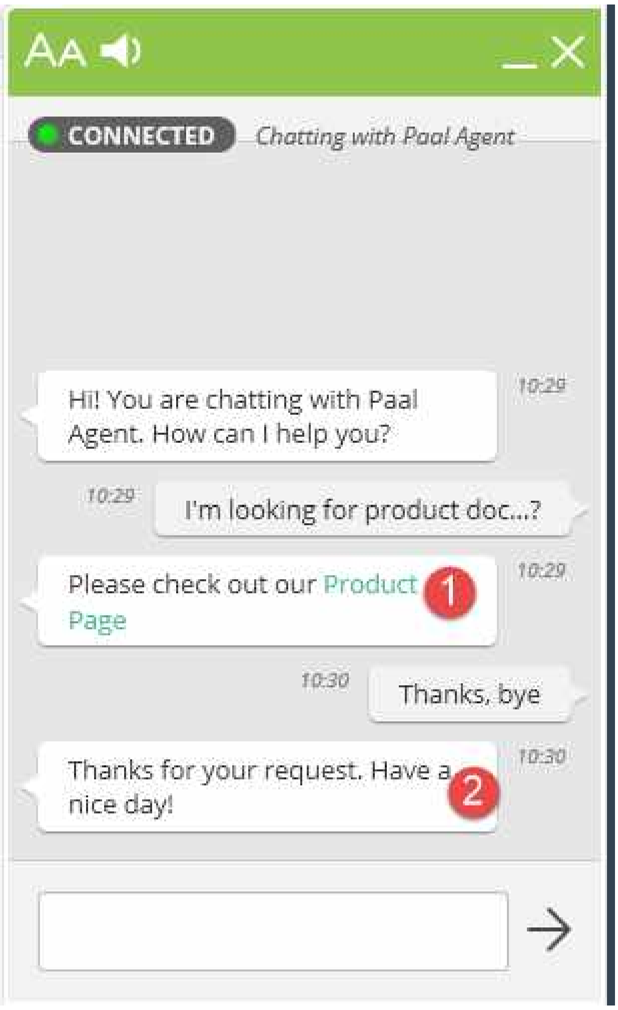
- **Chat nickname:** Chat nickname is a nickname for the agent. If its not defined, the agents Firstname and Lastname is shown to the chatter. Chat nickname is useful if you do not wish to display the full identity of your agents. The defined agent nickname is presented to the chat customer. You can 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.
- **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.

- <ahref="*url*">*link*
    - Product Page;Please check out our Product Page
    - Good bye;Thanks for your request. Have a nice day!



Solving Customer Interactions



Examples:

- **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 Puzzels email server. If you want this email to be sent from your own SMTP

server instead, you can register the alternative SMTP hosts **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 Puzzels web server to your SMTP host using TLS just after each chat ends, but it only works when your host is available.

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 the 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 e-mail configuration in Puzzel, please contact our support team.

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 agents Personal queue. The email is actually put in a transfer queue, but it's tagged with the correct agents 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 its 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.

Home Page

Here you can manage what key values to show in the grid on the Home Page.As a 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.

Logon to Queue

The most important properties hereare:

- **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 no answers**: Default is off. 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 the new Agent Application (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 receive an error and not "ringing". Please note that automatic logoff after no answers 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 clls dont get through to the agent anyway. If set to 0 (not recommended), the agent will not be logged off if he is

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.

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

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? in the Knowledgebase section.
- **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. Please note that Desktop agent application doesn't support this feature.

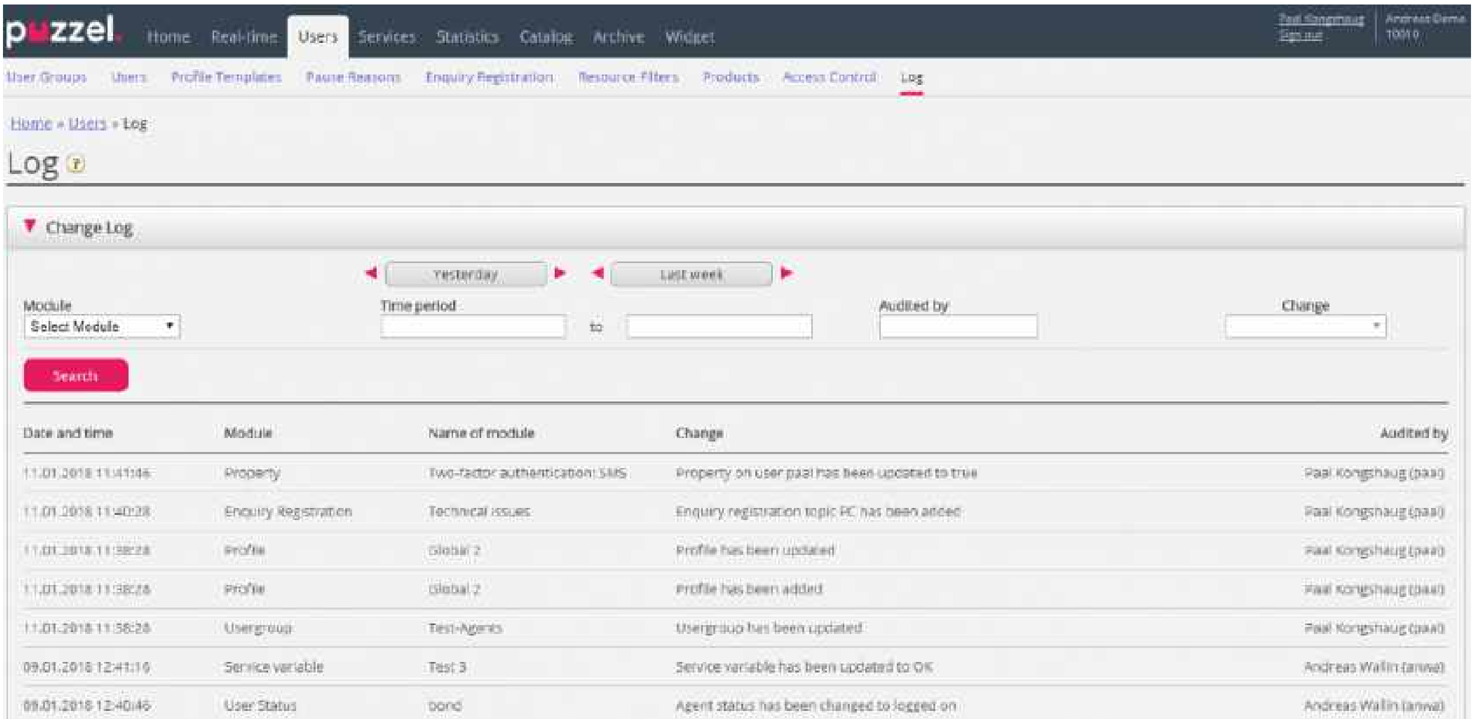
- **Web session timeout (in sec)**: Default is 43200 sec (=12 hours). If a user is signed in longer than the defined timeout, the user will be signed out. For the Wallboard user group, you can set the timeout to e.g. 7 or 31 days so that you don't need to sign in the wallboard users each morning.
- **SSO: 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.

Change Log/Access Log

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.



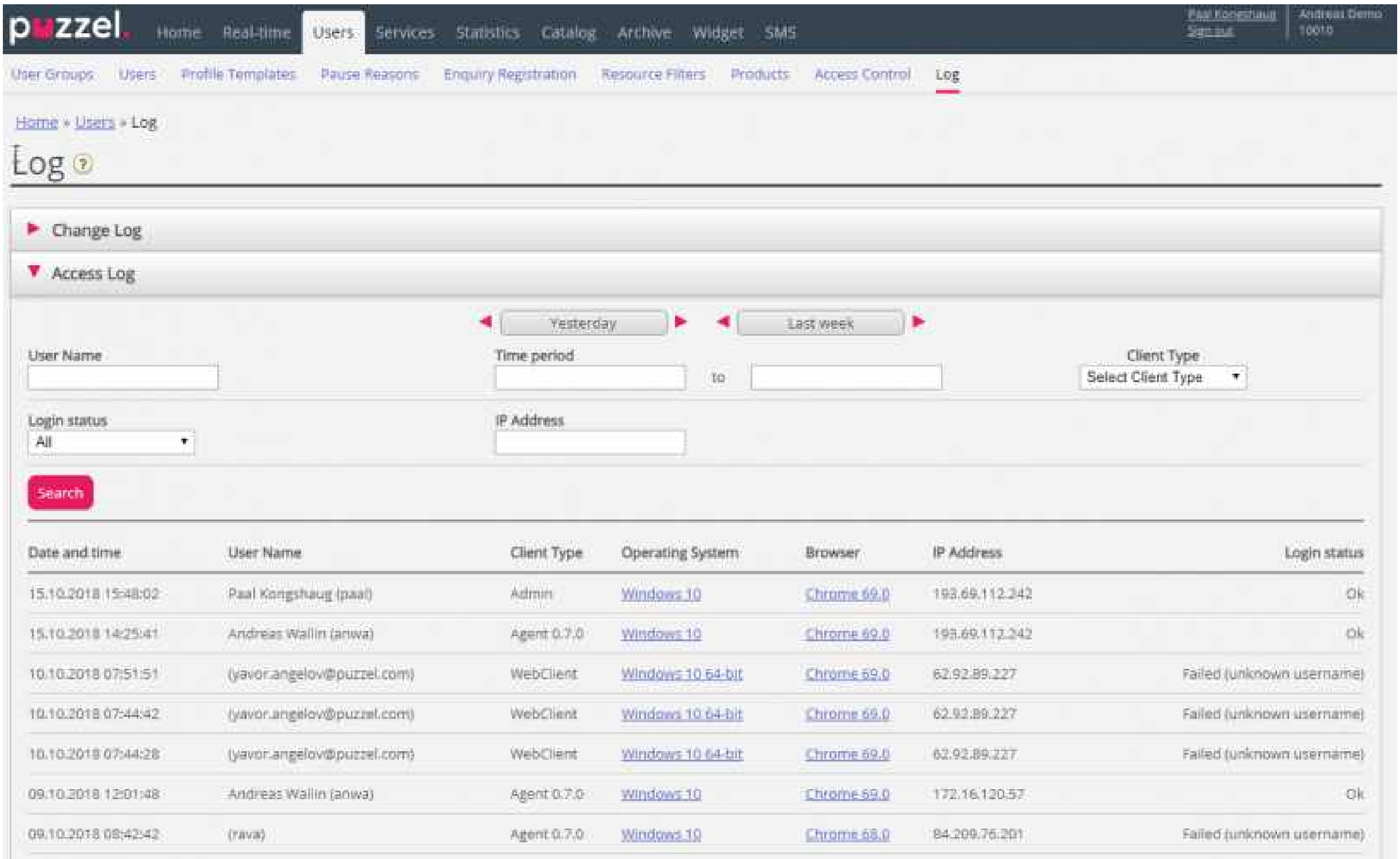
The change log includes the most important changes. What changes that are covered in the log can be seen in the drop-down menu in the Module field:

- 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)

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).

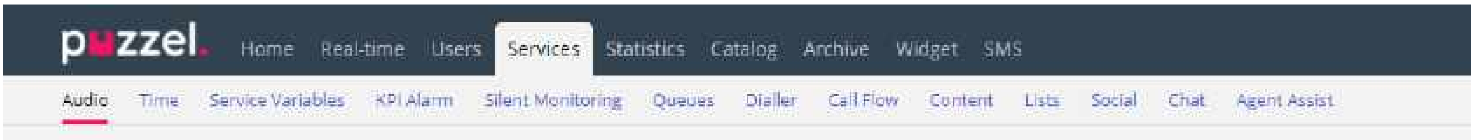


The Access log initially shows the 20 most recent sign in attempts to Puzzel (not logon to queue). You can search for sign in attempts with different search criteria like User name, Client type (e.g. Agent, Admin, PuzzelApp), Login status (OK, Rejected) and IP address.

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**.

Services

Under the Services tab you find several different things, e.g. Audio, Time, Service variables, Queues, Dialler, Call Flow, Chat and Agent Assist:

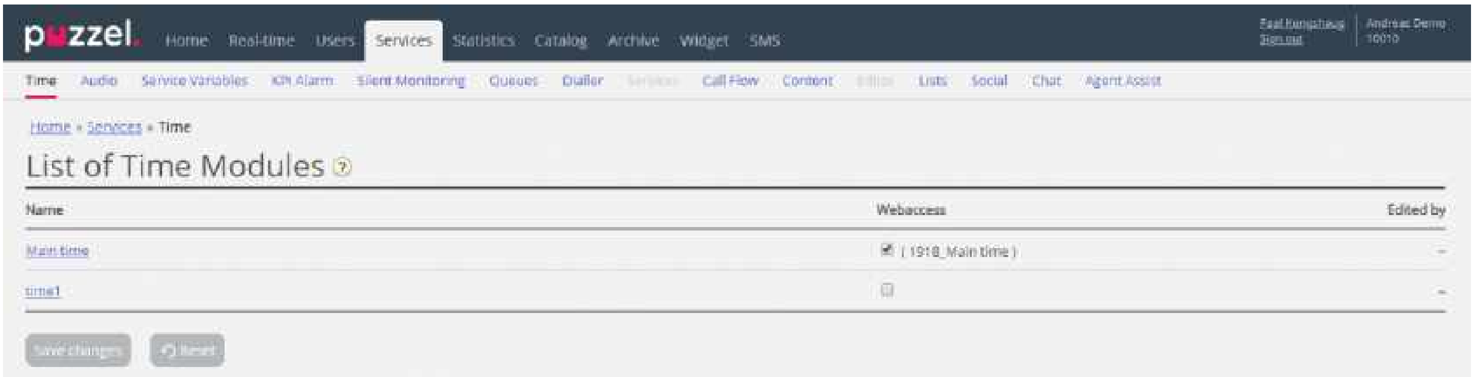


To browse through all the articles, look into the index tree on the left.

Solving
Customer
Interactions

Time

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



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 in the Admin Portal.
2. **Shared** Time module: Shown in Admin Portal. 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 Tool, but not shown in the Admin Portal, since a bound time module uses the opening hours and exits defined in a 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 (new) local time module to be shared. Inside the *Basic* tab of the Time module, you will see the "*Convert to shared Time module*" button.

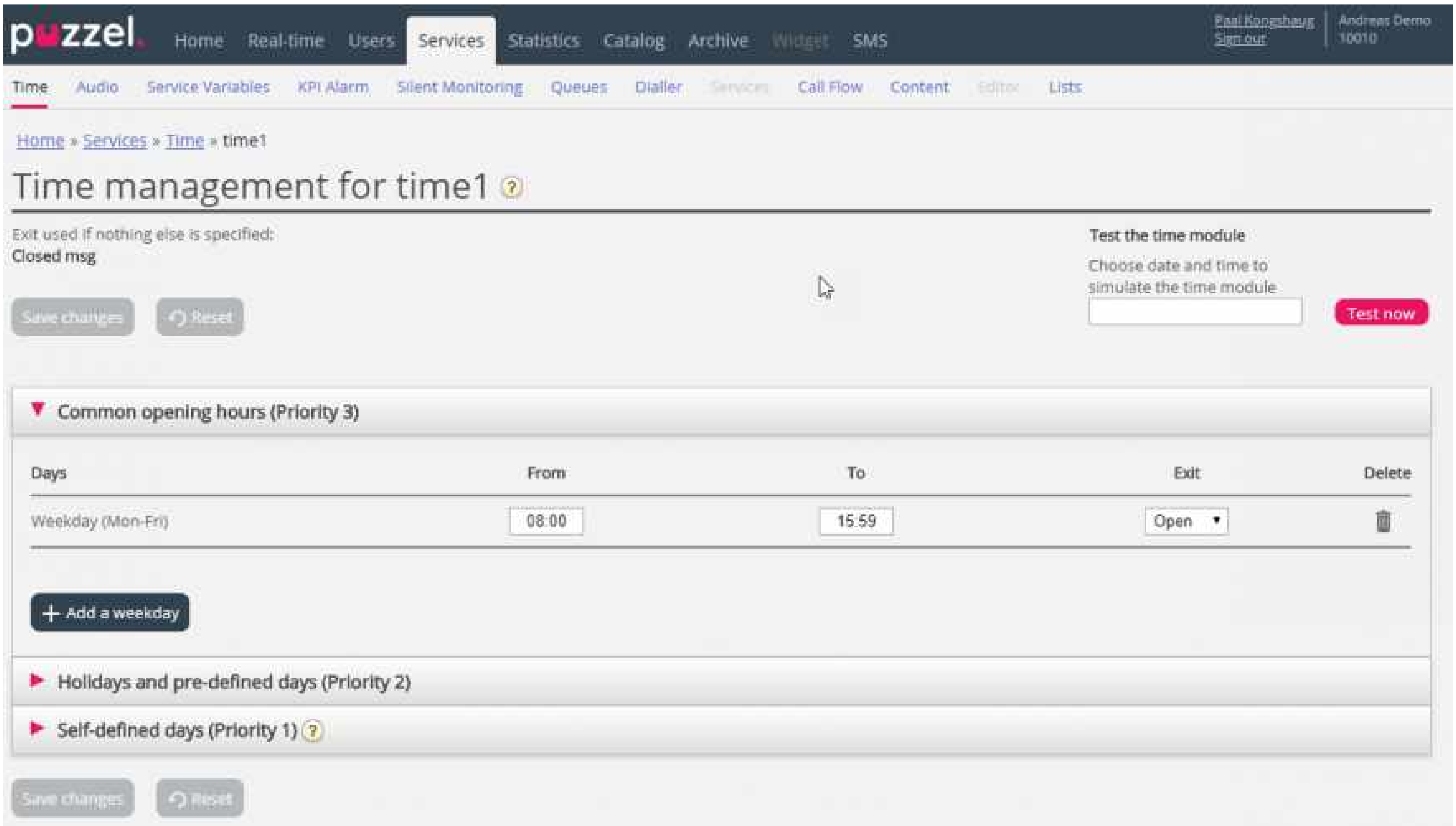
When you have created a Shared time module, you can choose to ***bind*** one or more other time modules to the shared one. (In the Basic tab, you will see a "*Bind to shared Time module*" button.)

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.

Modifying a Time Module

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



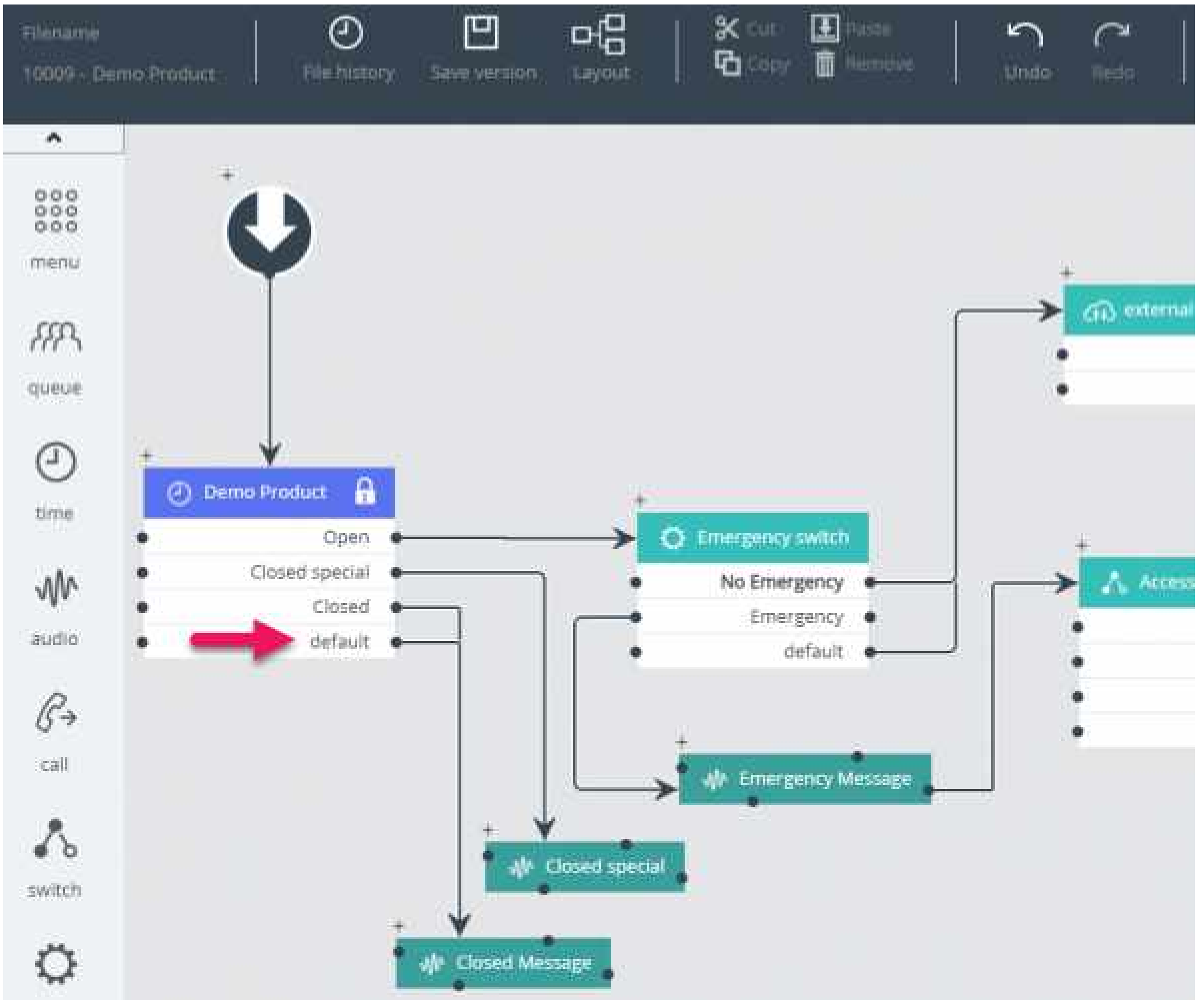
The value in the To field should always be set one minute before the desired ending time. This is because it covers a whole minute. If you set end 15:59 this means end 16:00:00.

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

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:

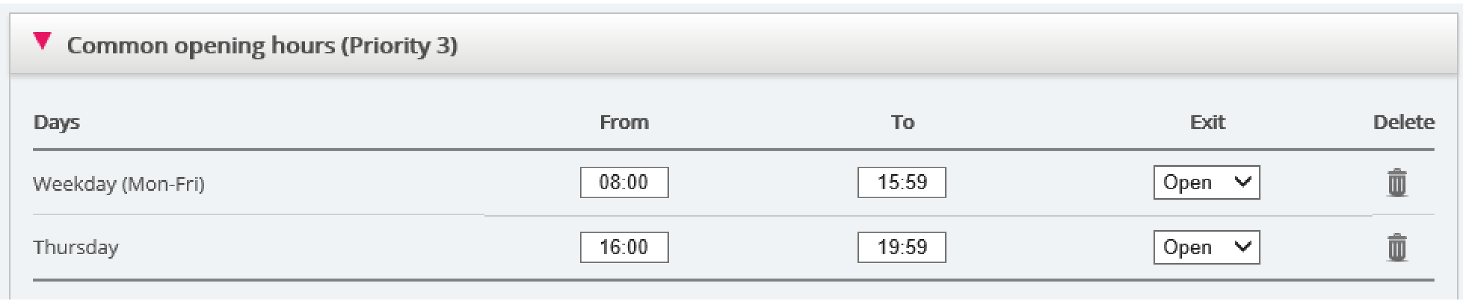


Common Opening Hours

Define the contact centres normal opening hours in the *Common opening hours* tab by clicking *Add a weekday*.

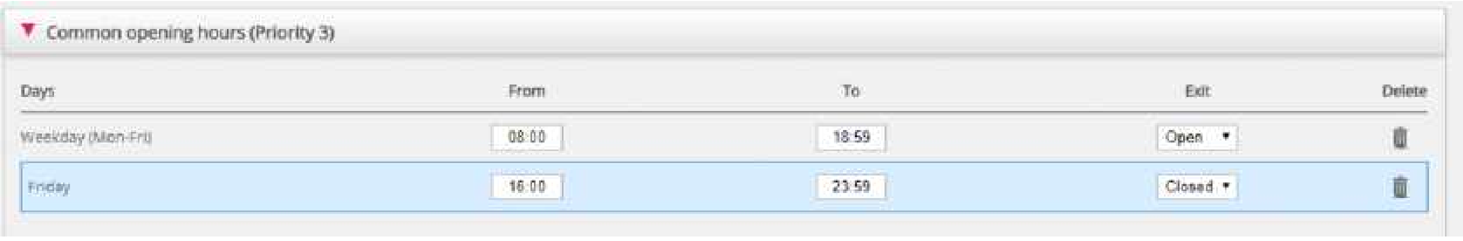
In the new window that appears you can add an entry with From time and To time for Weekday (Mon-Fri), Weekend (Sat-Sun) or an individual day, using the relevant Exit. The easiest way is to define when its open and have Exit used if nothing else is specified (default exit) pointing to a "closed message". 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) 08:00 to 15:59 and on Thursday from 16:00-18:59.



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:



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

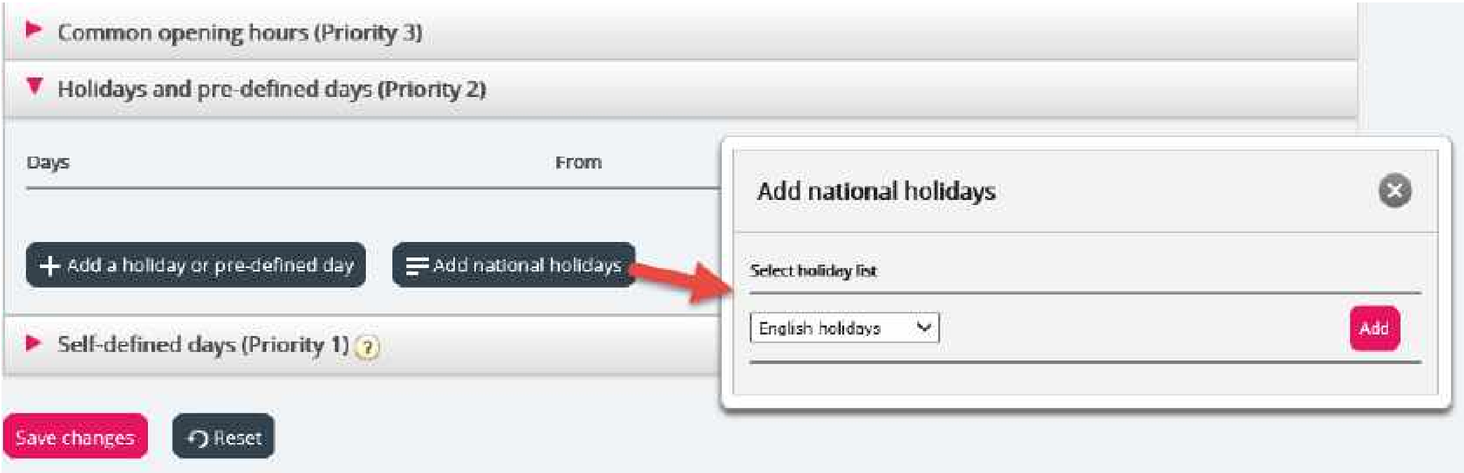
Holidays and Pre-defined Days

Holidays and Pre-defined Days

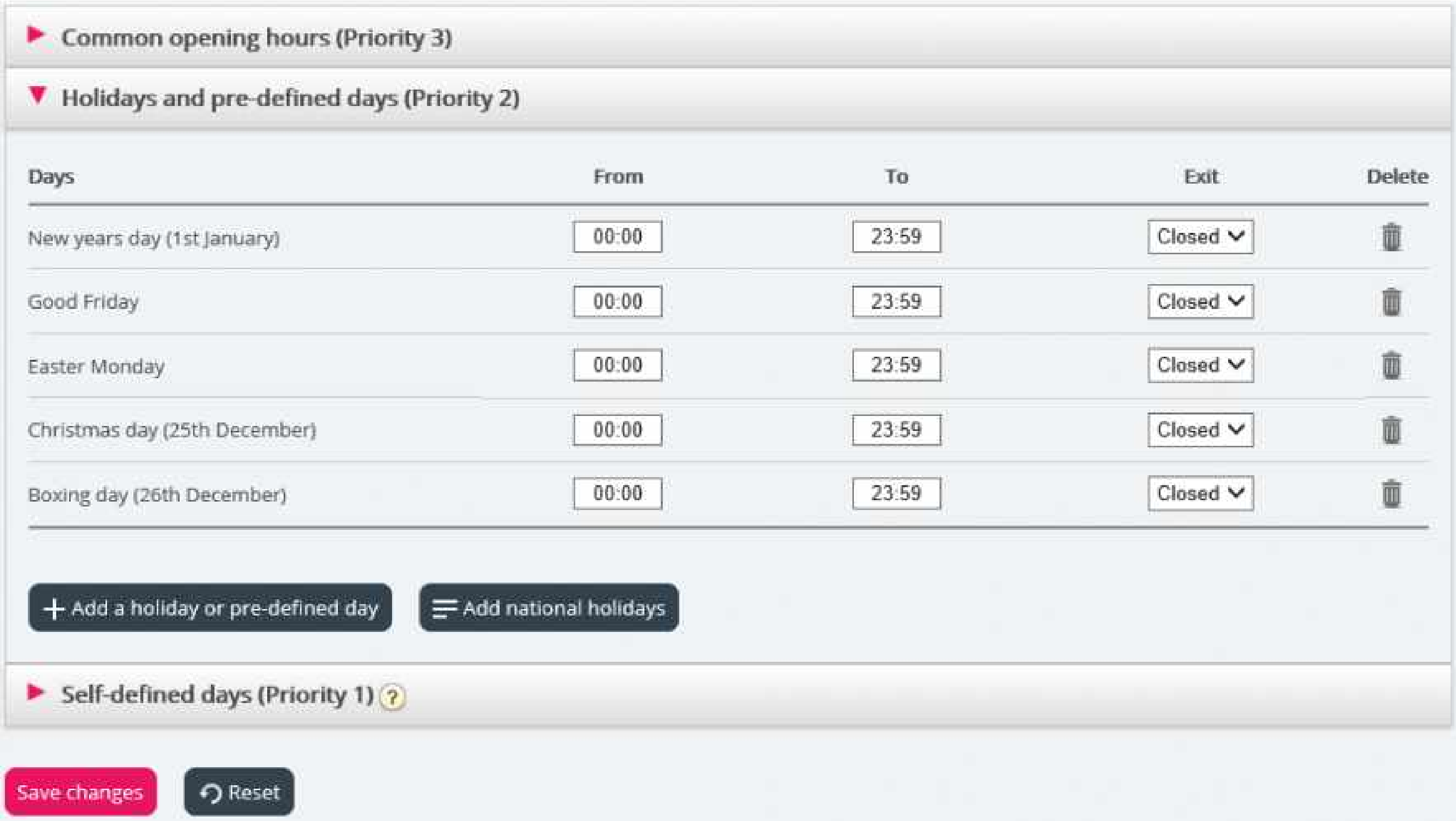
In the Holidays and pre-defined days accordion, you can define special opening hours for holidays and other special dates. You can add the relevant holidays for your Puzzel solution one by one (Add a holiday or pre-defined day), or you can add your countrys holiday list and then remove days in the list you dont need before you save.

Adding a national holiday list

First click *Add national holidays*:



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



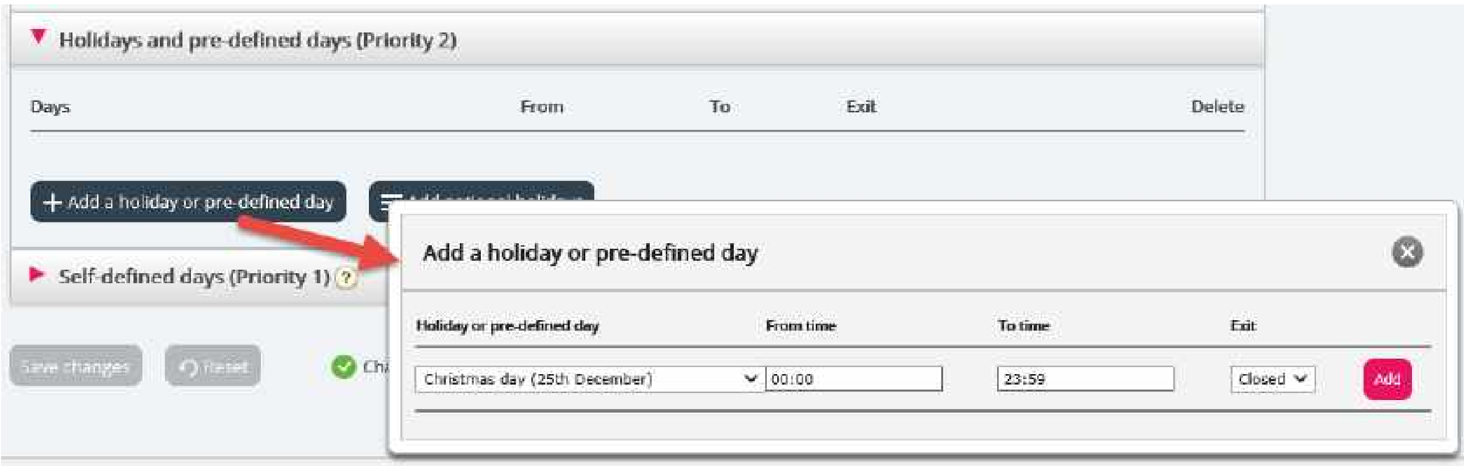
Delete the days you dont need, adjust the *From* and *To* if needed, and choose the correct *Exit* per day before you click *Save changes*.

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*.

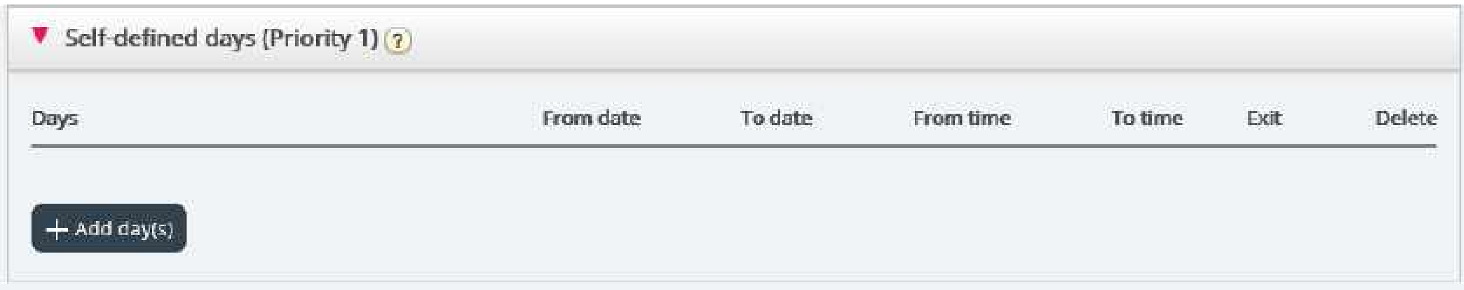


Then click *Save changes* if things look OK.

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.]

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).



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

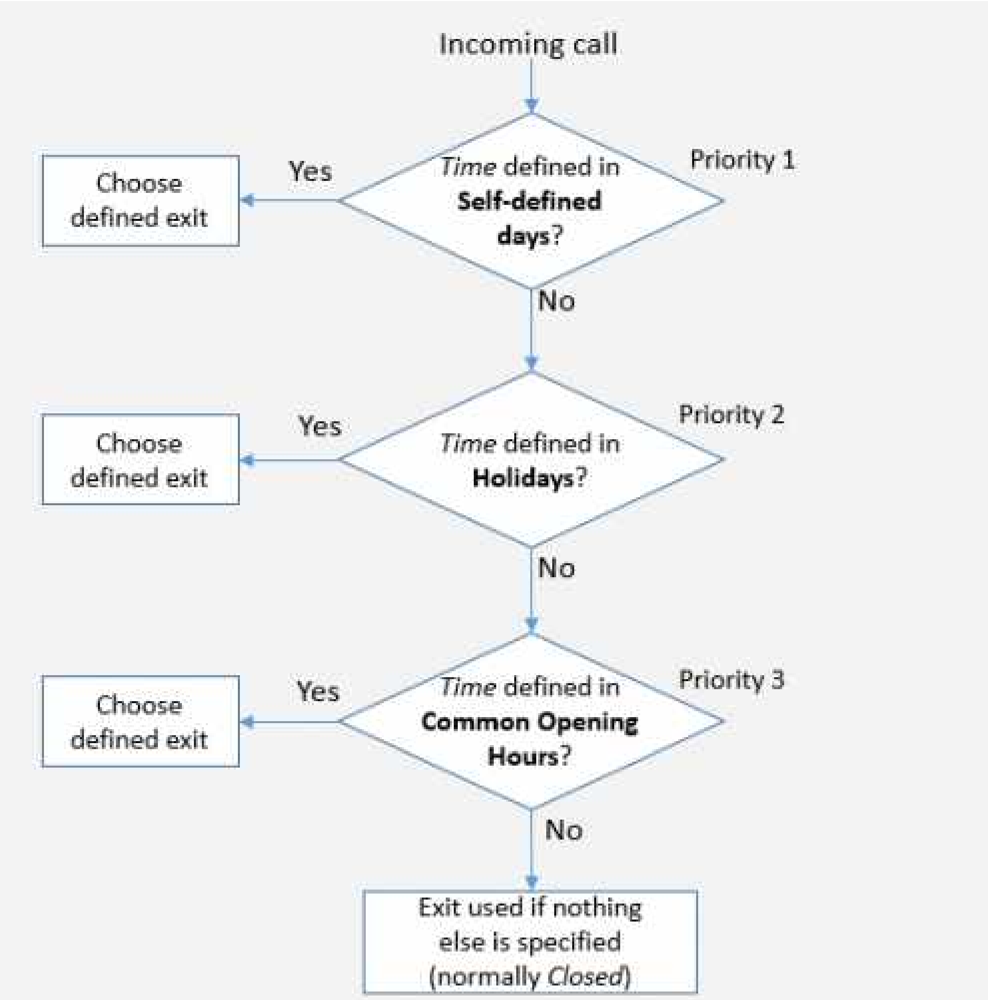
1. *Add a time interval for one day, by setting the same From date and To date, and the desired From time and To time. To choose the whole day, select From time 00:00 and To time 23:59.*
2. *Add a date range that should use the same exit for the whole date interval. Select From date and To date and set 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)
14-12-2015
14-12-2015
00:00
23:59
Lukket
Example 2 (1. February 2016 - 5. February 2016)
01-02-2016
05-02-2016
00:00
23:59
Lukket
Example 3 (1. July 2016 - 31. July 2016)
01-07-2016
31-07-2016
16:00
17:59
Lukket
Example 4 (1. August - 2. August)
01-08
02-08
00:00
23:59
Lukket

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)*

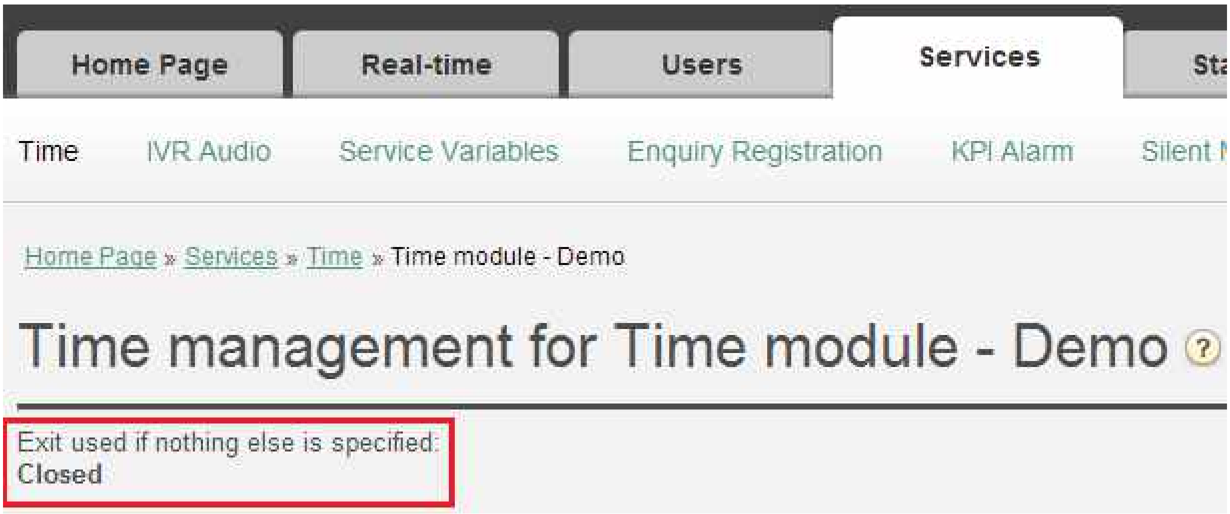
A Self-defined day takes precedence over a Holiday and pre-defined days, and a Holiday and pre-defined day takes precedence over a Common opening hour.

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).



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.

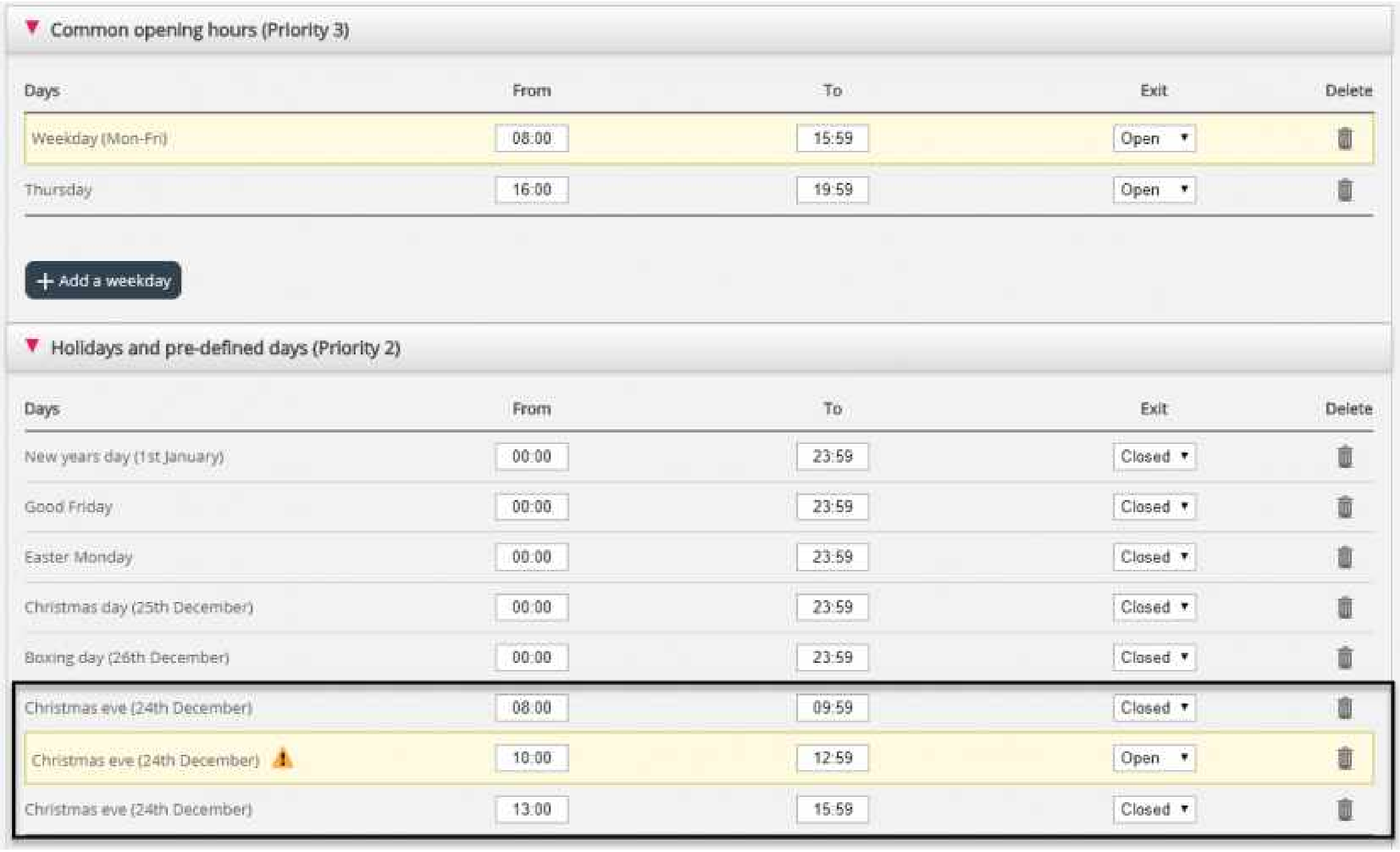
Lets say that on Mondays the contact centre is open 08:00-15:59, but on Christmas Eve (Monday) you only want the contact centre to be open 10:00-13:00.

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.

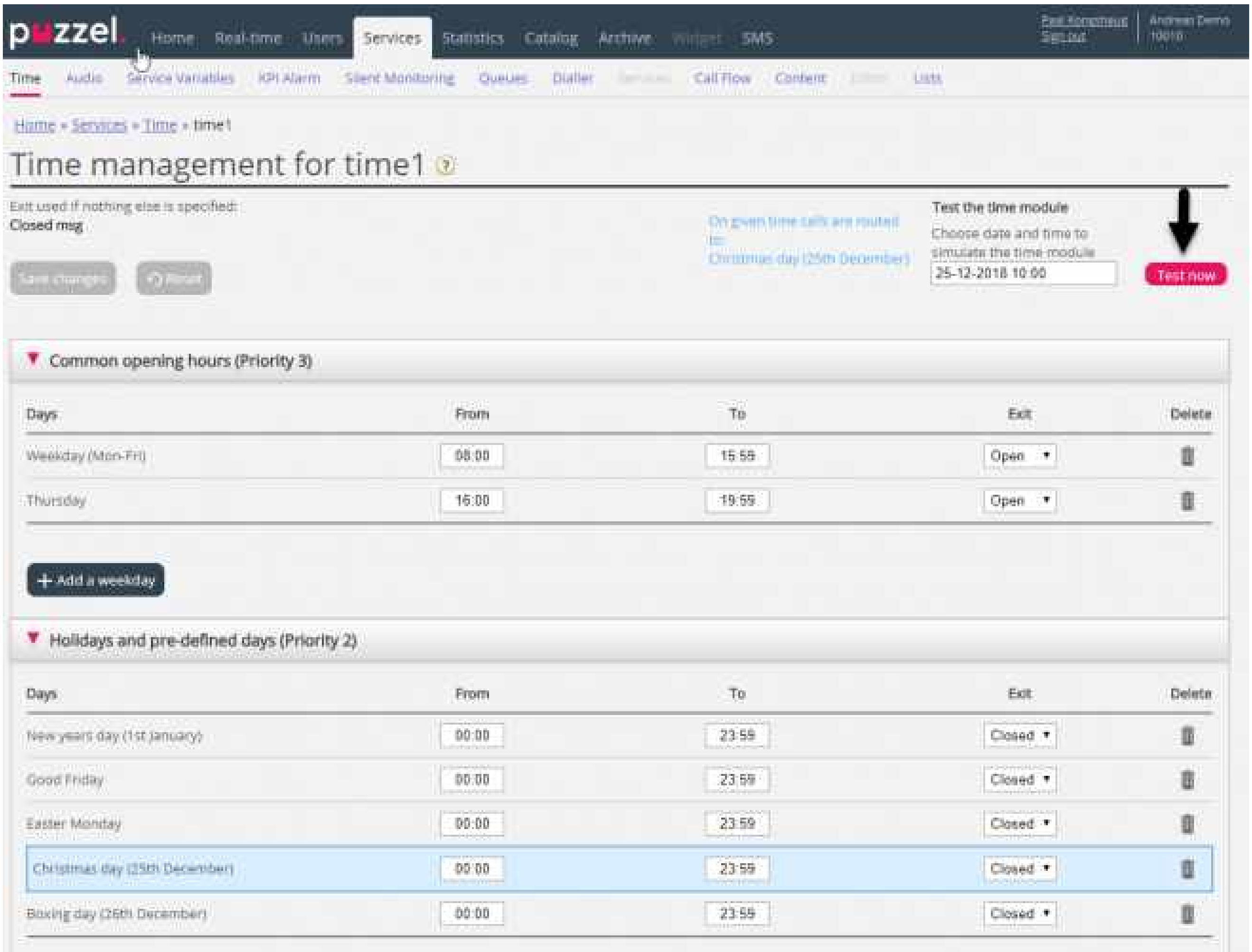
We need to define that its closed on Christmas eve before 10:00 and after 13:00, e.g. like this:



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 will be highlighted in blue.

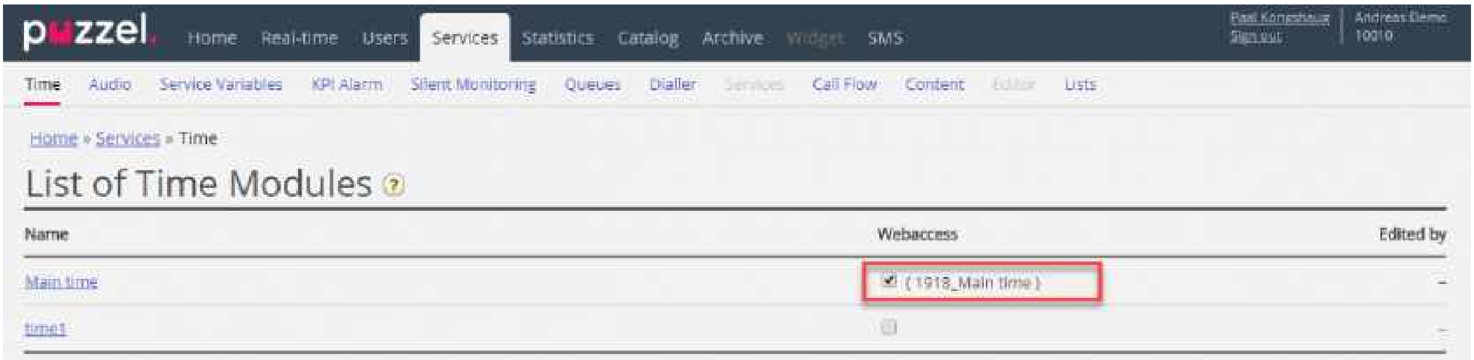


Incorrect services

If your settings are incorrect, for example *From time* is later than the To time, or the same time interval is covered by two 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.

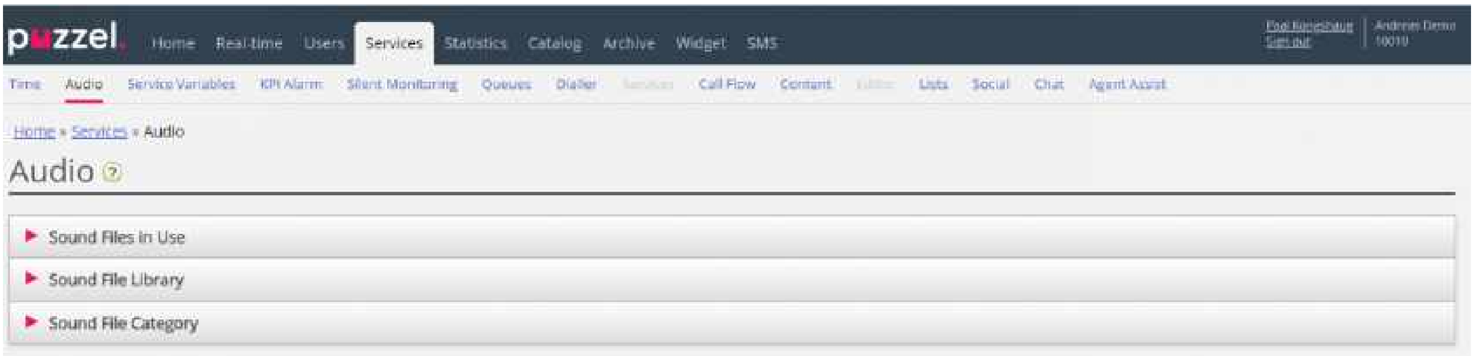
Web-access to Time Module

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 its open, you can open the relevant Time module for web-access if you dont use Puzzel web-services. Your company's web-site can then ask Puzzel if its open, and then offer callback or chat only when it is open. See also Web-access to Queue.



Audio

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

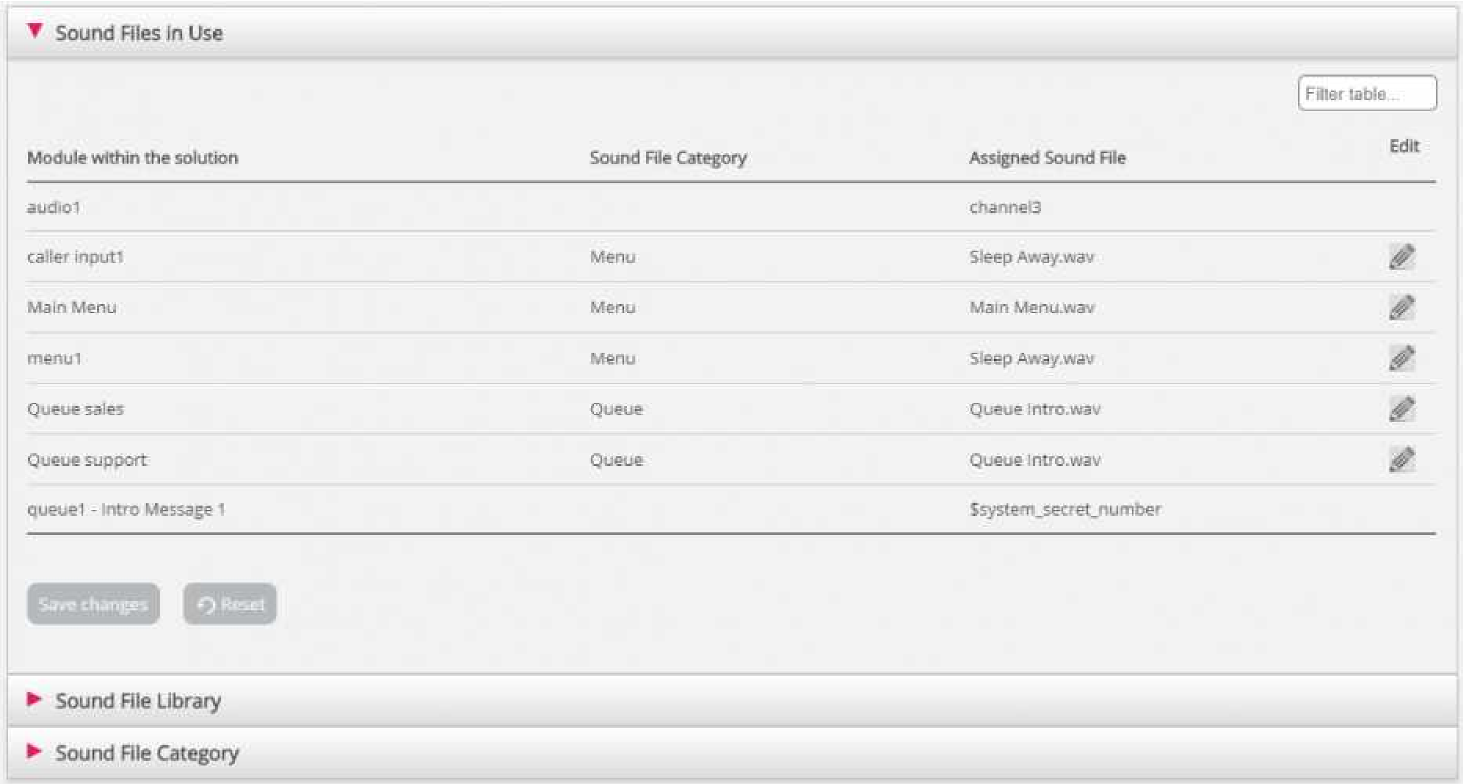


Support can configure the solution so that only some sound file modules are visible here.

Solving Customer Interactions

Sound Files in Use

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



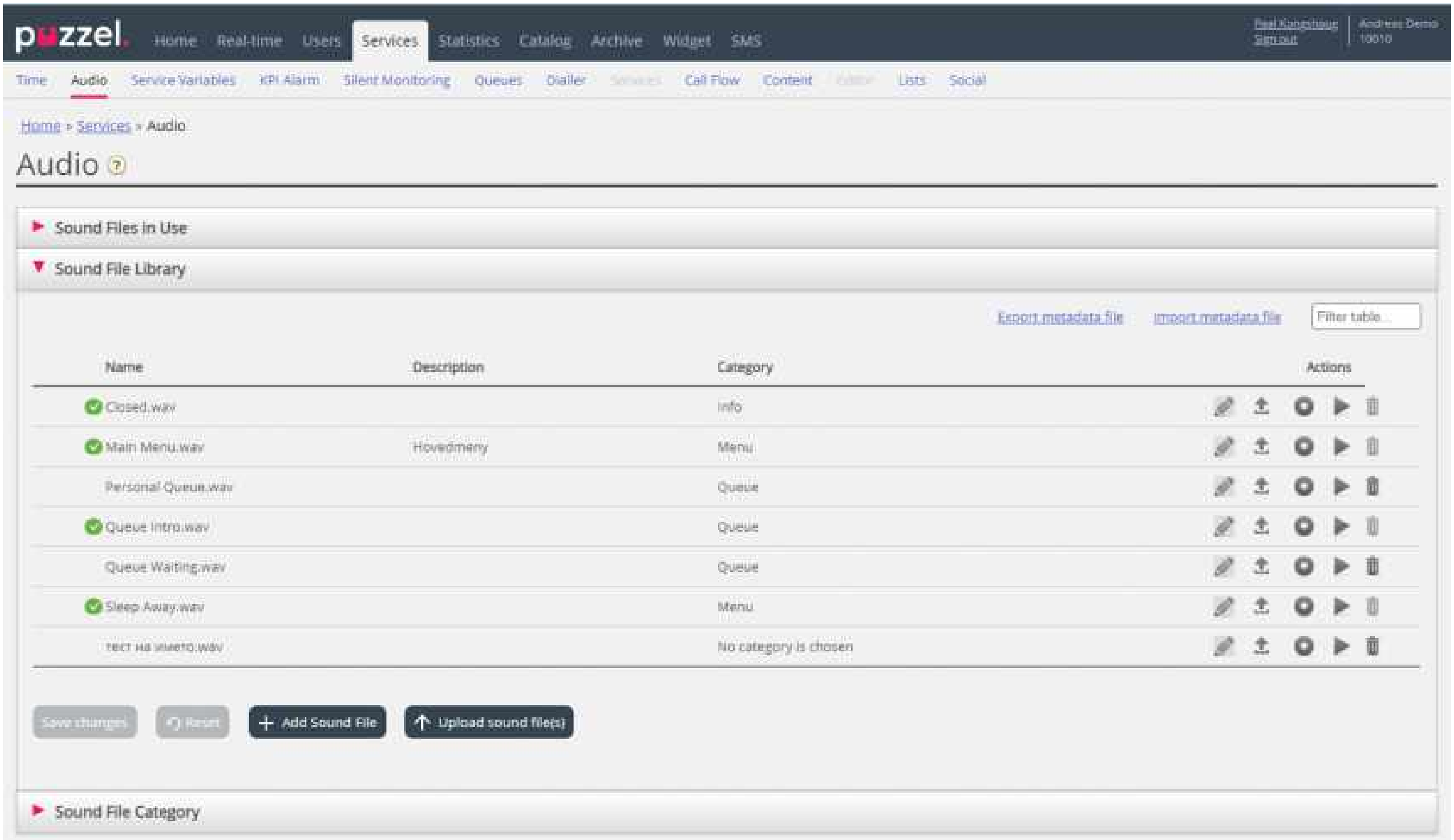
If you want to change the assigned file for a module, click the Edit symbol (pencil) next to it, then change the Sound File Category if needed and choose the new file in the Assigned Sound File list box, and then click Save changes.

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.



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 PCs default audio player. (wav files cant be played in the browser).

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

puzzel. Solving Customer Interactions

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 an MP3/OGG/WAV file.

Import/export sound file metadata

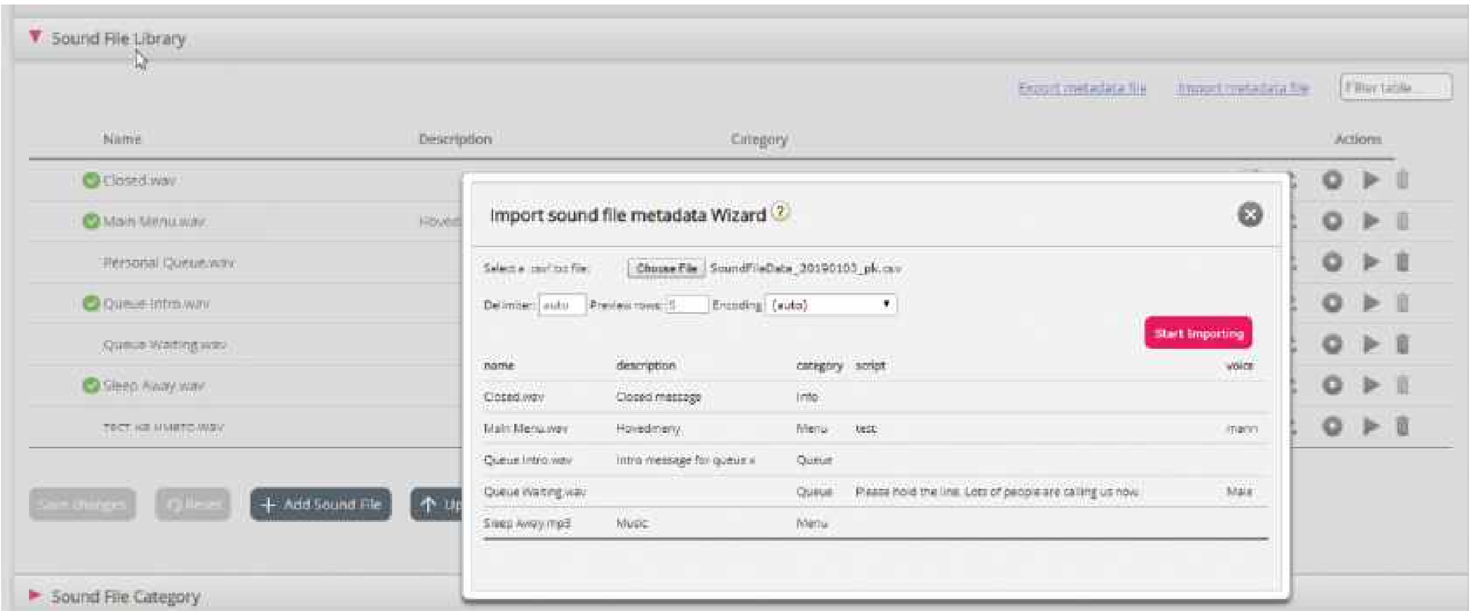
You can export a file with metadata to get an overview of your sound files. If you click *Export metadata file* and then Confirm, a CSV UTF-8 file with columns*name, description, category, script, voice,*and*usedNow* will be generated.

	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 used Now (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:



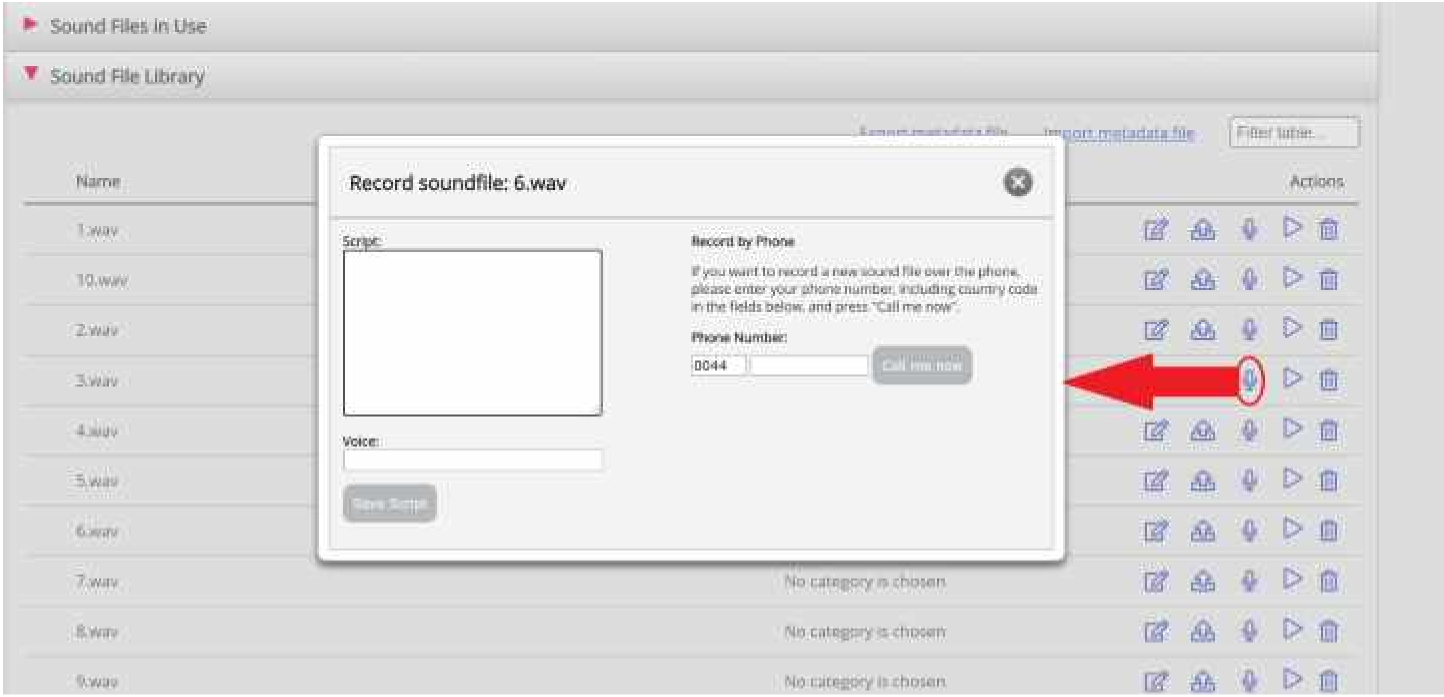
If there are errors in the selected file (wrong column headers, duplicates, values in category or name which does not exist), you will see it and you will not be able to click *Start importing*.

- The file must contain only existing sound file names and existing categories
- If description, category, script, or voice have values 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

Record Sound File

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

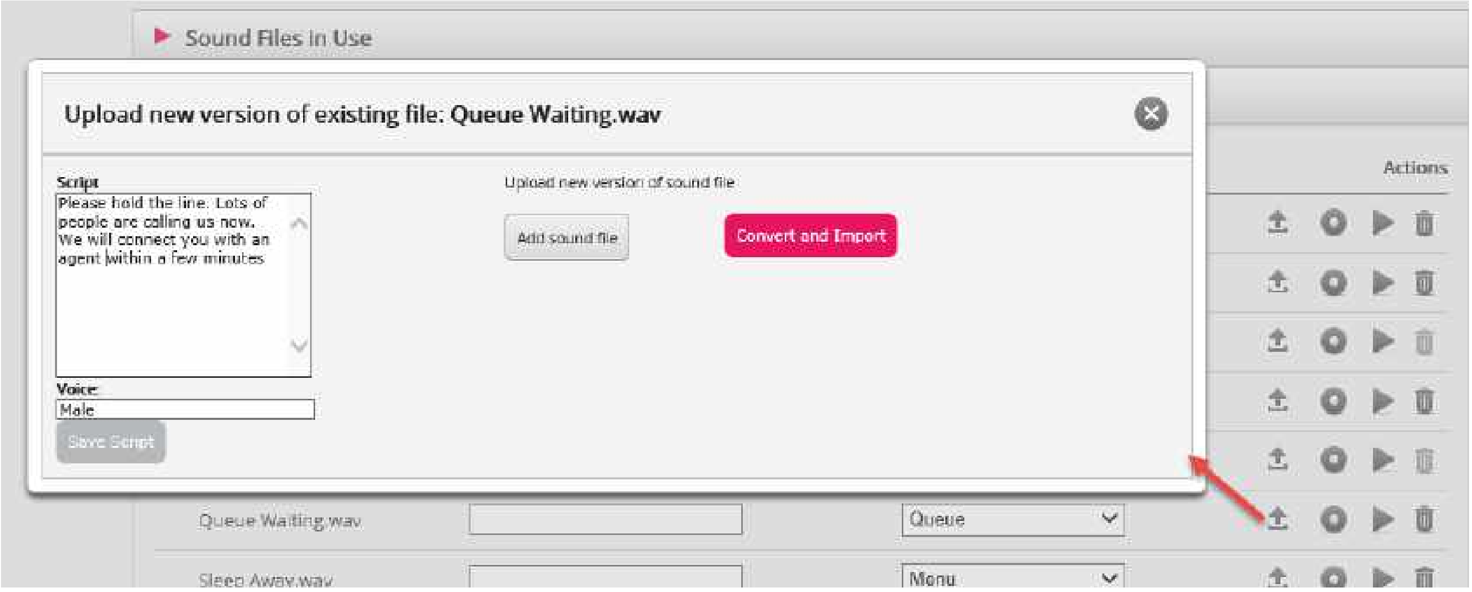
When you are ready to record, enter your phone number and click *Call me now*. Puzzel calls you and gives you instructions on when to start speaking and how to stop, playback and save recording.



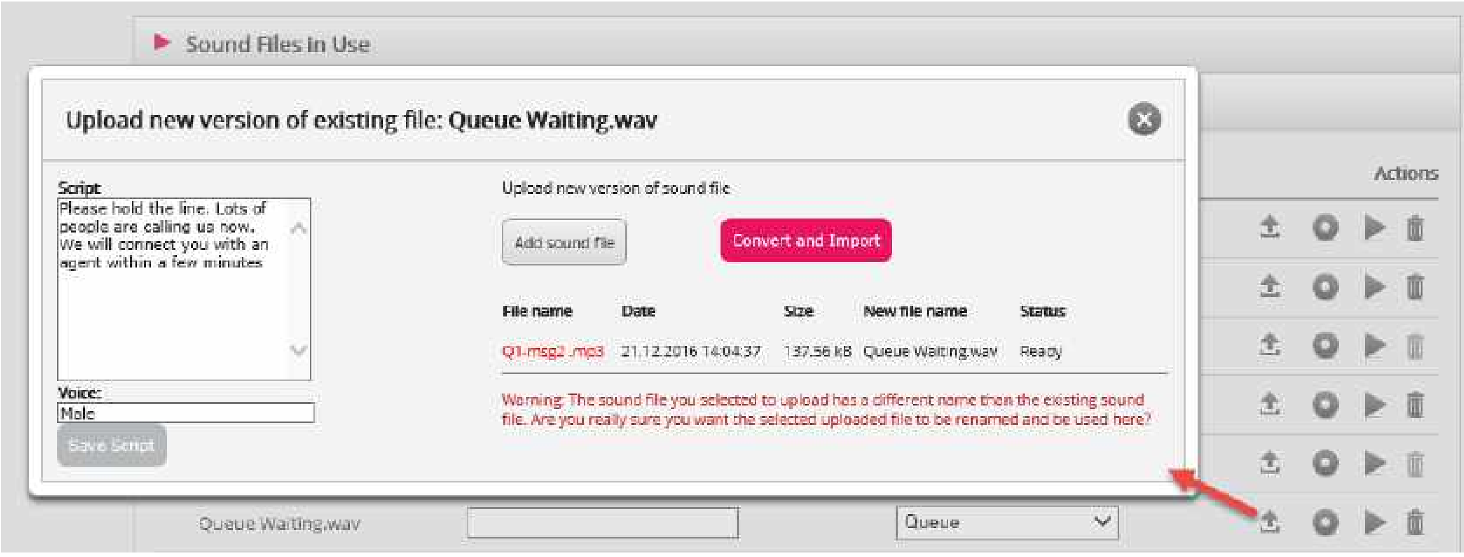
Upload Sound File

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.

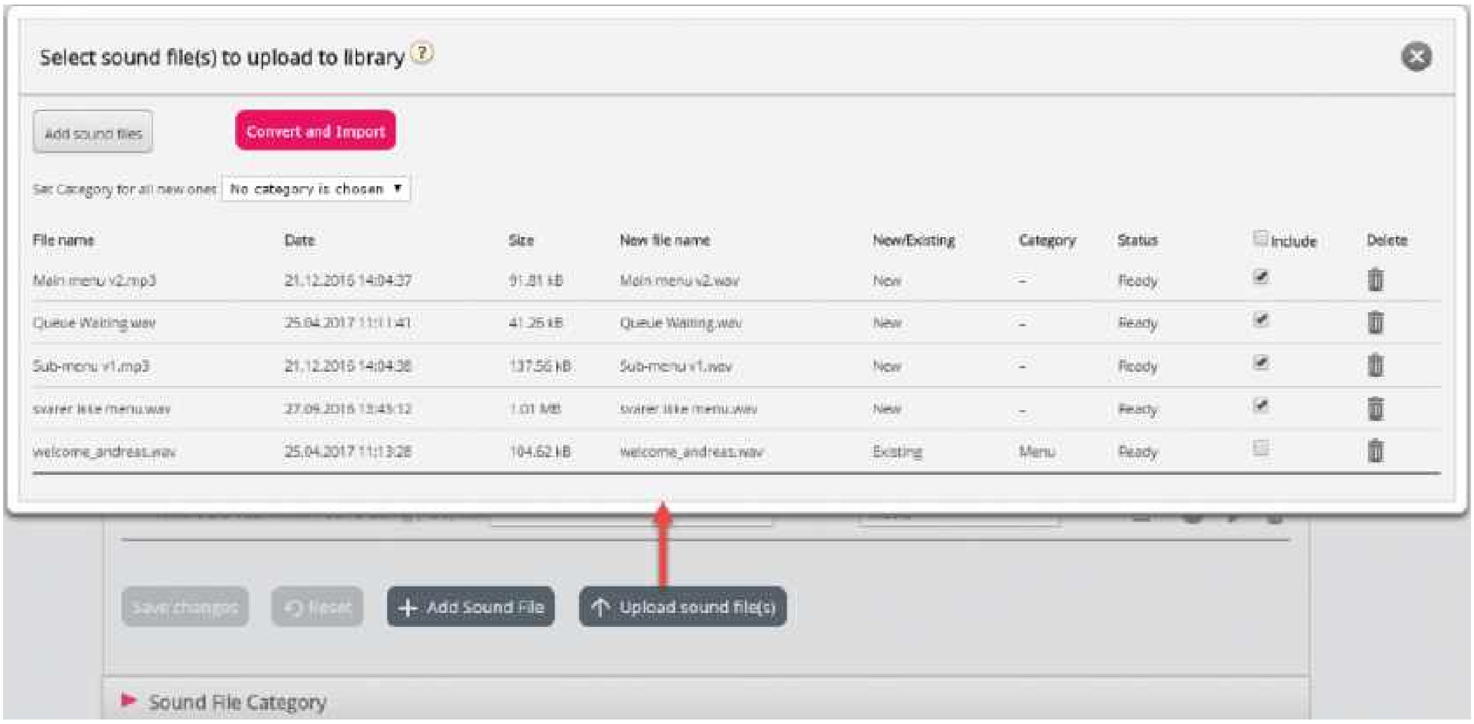
If you want to upload one sound file that replaces an existing sound file, click the upload symbol next to the sound file to open the window where this can be done.



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 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. Lets 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.

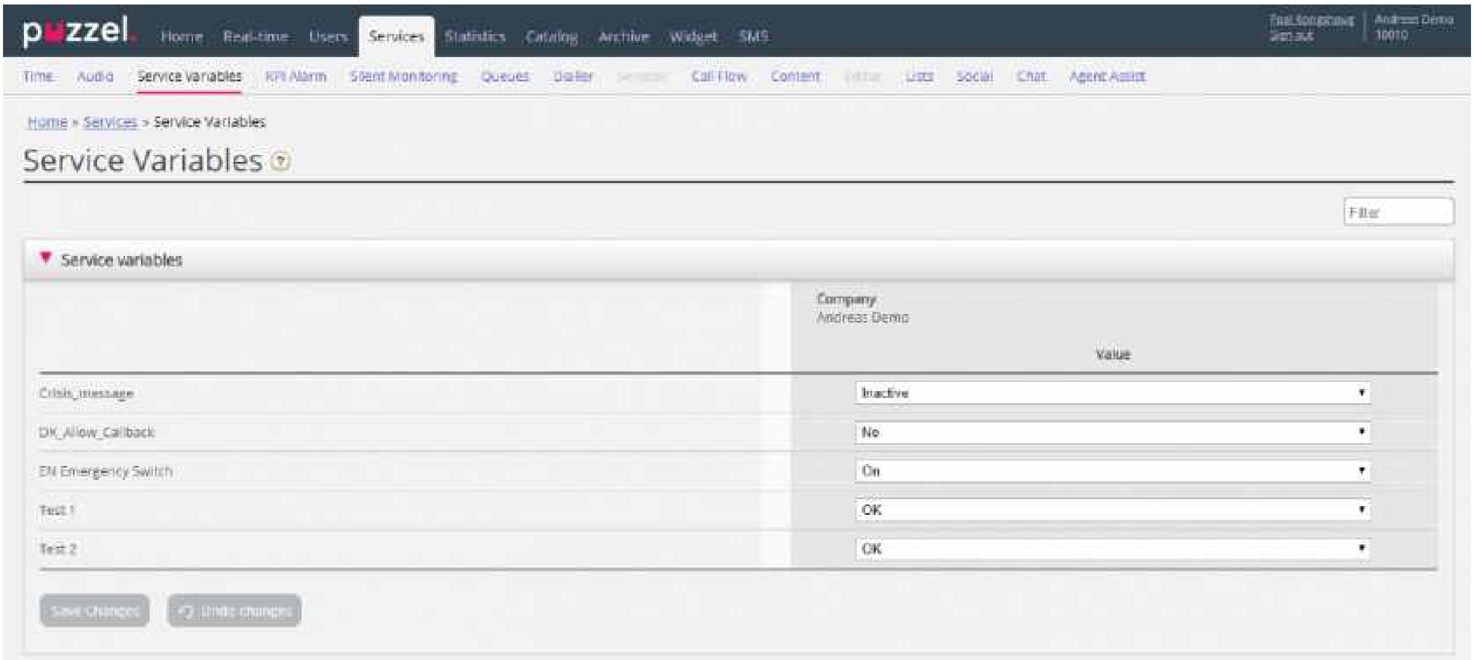
Sound File Category

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.

![puzzel. Solving Customer Interactions]

Service variables

On page *Services - Service variables* you can change some variables in the Puzzel solution. The main purpose is to determine how a request is handled, either by assigning each variable a value from a drop-down 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:

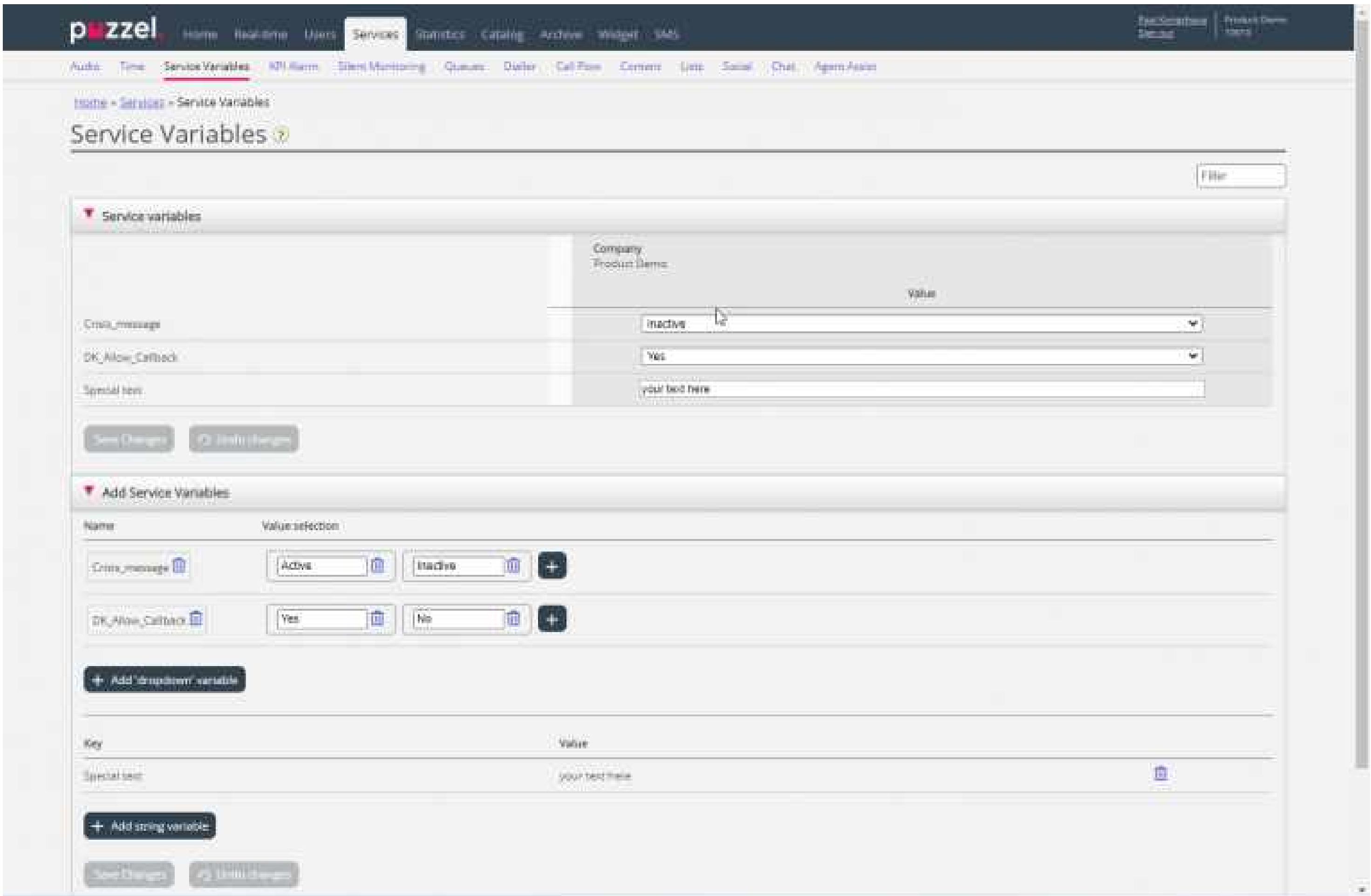
- *Opening hours*
- *Special voice message*
- *Route traffic*
- *Switch functions on/off*

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 call-back 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.

Add Service variables

Certified Call Flow Tool users may on request be given access to accordion 'Add Service variables' on this page, so that they can create new and edit/delete existing service variables themselves.

If the Administration property 'Add Service variables' is ON for a user, this user will see accordion *Add Services variables* on this page:



In the *Add Service variables* accordion, the user can add new service variables (drop-down and string) and edit existing ones.

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 KPIs (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 applications Queue overview (unless its turned off)*

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

Types of Thresholds

There are two types of thresholds to choose from:

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

Real-time values

Name	Description	Example
SLA-Score Now	The queues 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
Call-backs in Queue	Total number of call-backs waiting in queue now	>10

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

So far values

Name	Description	Example
Avg. Speak time so far	Average Speak time for answered calls so far today	>240
Avg. Wait time so far	Average Wait time in queue for answered calls so far today	>120
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% (sec)
Avg. wrap-up time so far	Average wrap-up time for answered calls so far today	>120 (sec)

Name	Description	Example
Calls offered so far	Number of calls offered to (=arrived in) a queue so far today	>100

Alarms

In the Alarms accordion, you create your alarms.

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.

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!

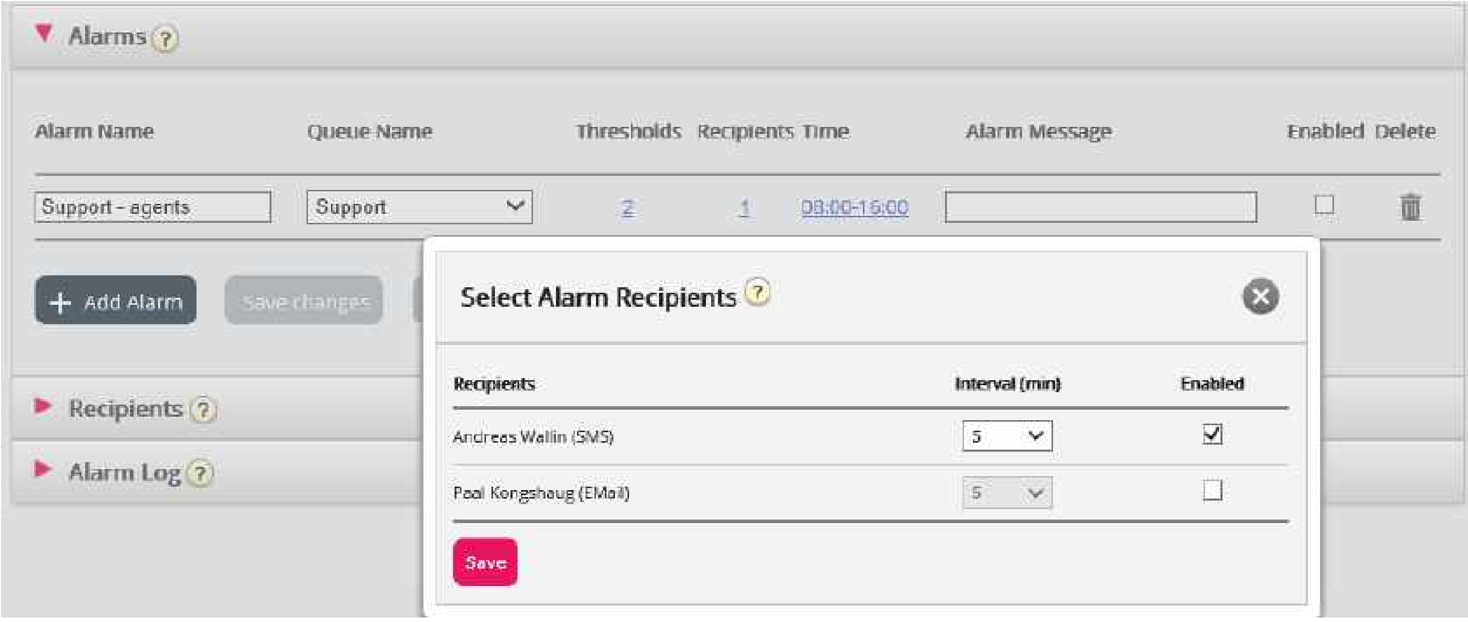
Here you can define the types of threshold and their values for the chosen alarm. One alarm can contain one or more thresholds.

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.

Recipients for an Alarm

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



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.

Time Period for your Alarm

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

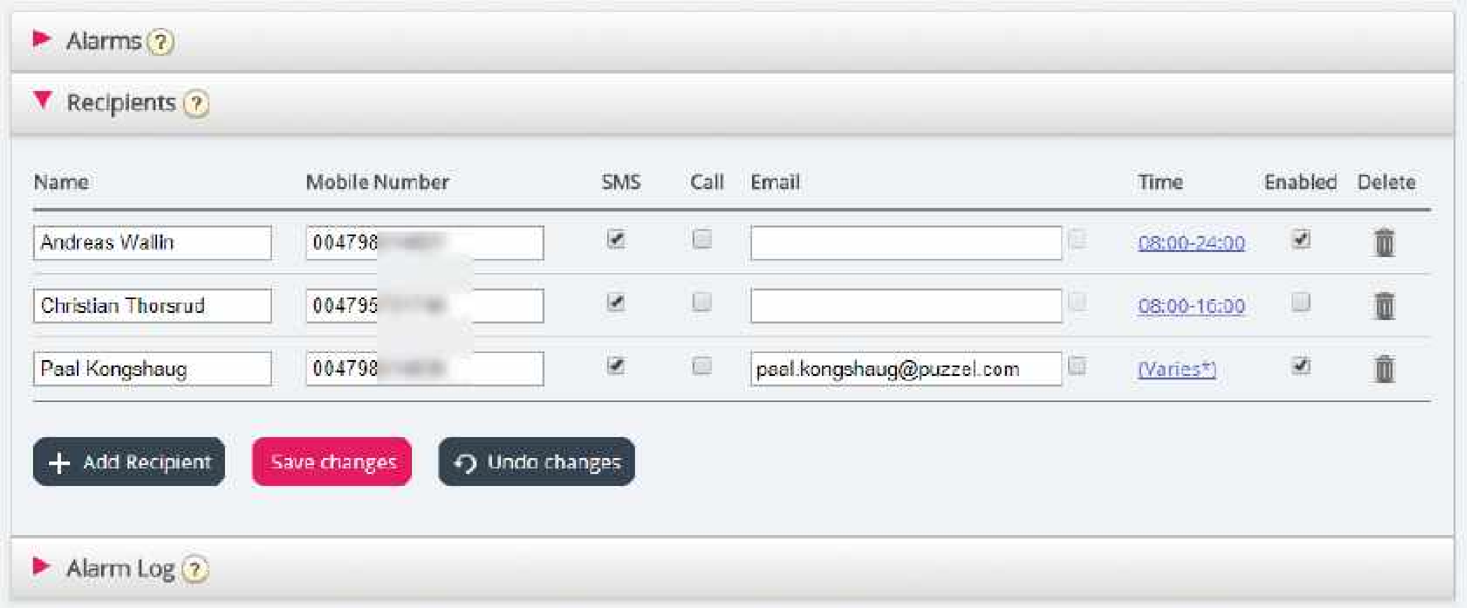
To change the Time an alarm should be active, click on the hyperlink in the Time column to open a new window.

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.

Recipients

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



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

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.

Solving
Customer
Interactions

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.

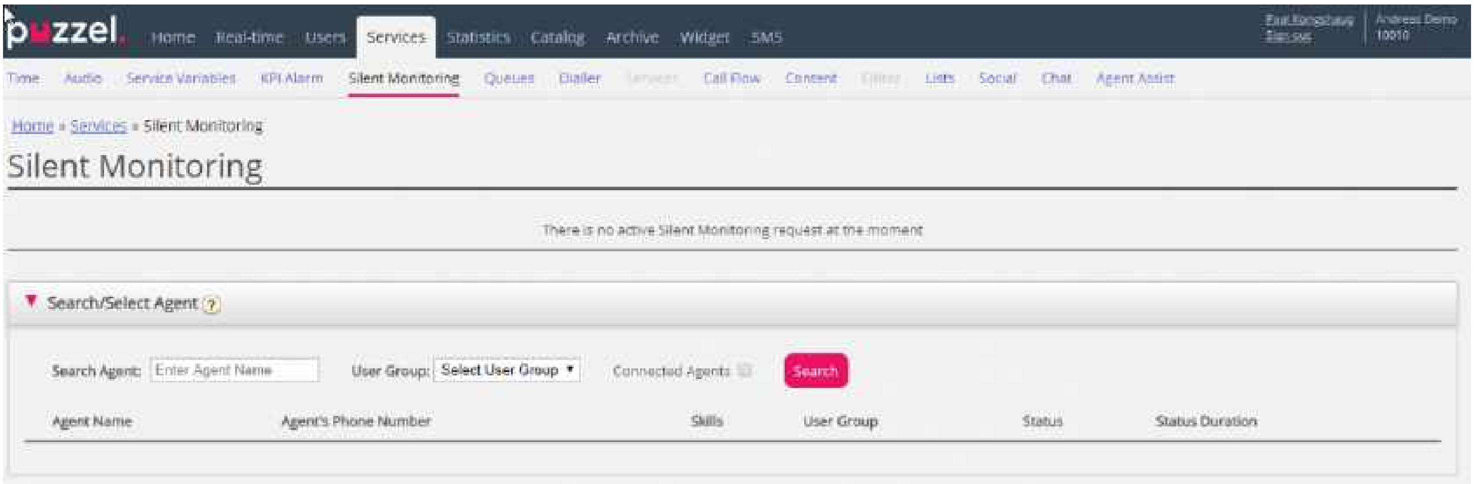
Silent Monitoring

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 listeners voice during the call.

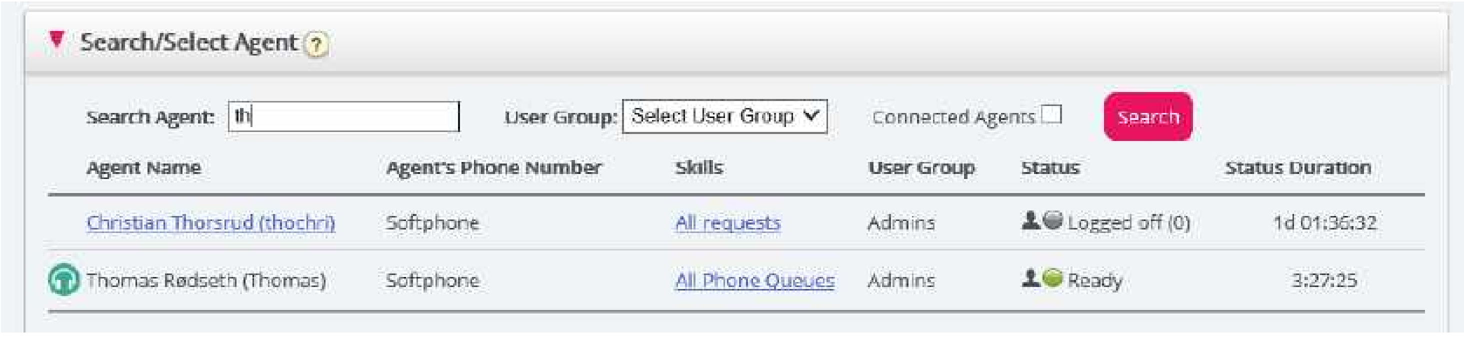
Your Puzzel solution can be configured to notify the agent that he/she is being monitored when someone is monitoring a call (a headset icon will appear in the agents application, and a short beep (~0.3 sec) is played for the agent). However, if the notification feature is turned off, the agent will not be aware that their 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.



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.



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

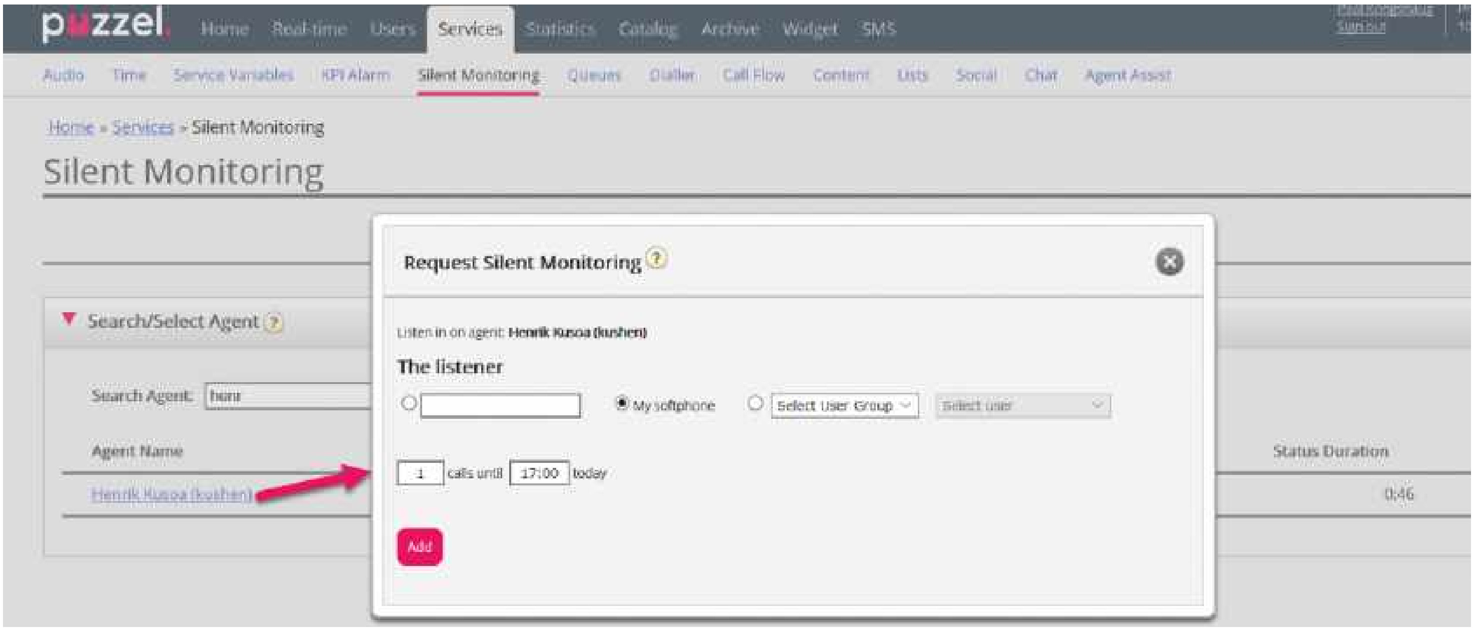
Request Silent Monitoring

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.



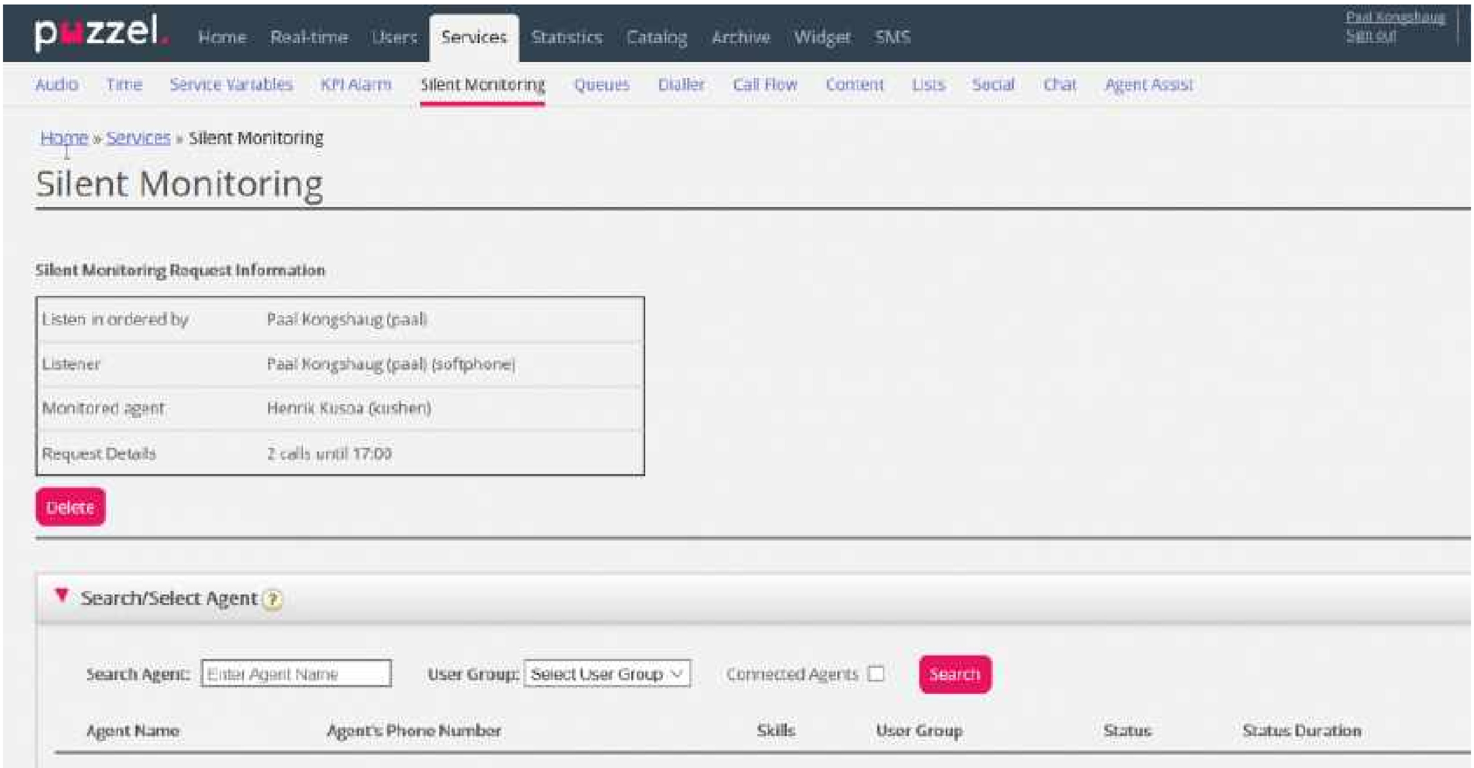
You then need to decide how many calls you want to listen to (default 1) and until what time. The reason you set a time limit is to avoid situations where Puzzel calls you/the listener when unavailable (e.g. in a meeting)

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

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/teh 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.

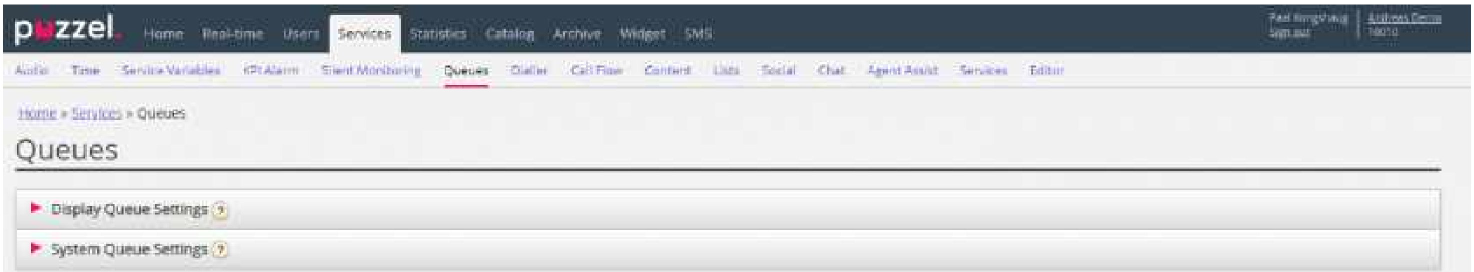


When Puzzel calls the listener’s phone so that the listener can listen in on the agent’s conversation with the caller, the call information (caller’s number, access number, queue name) will appear in the upper right corner on the Silent monitoring page for the user that ordered the silent monitoring. 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 its very likely that the 2 agents will be connected at the same time!

Queues

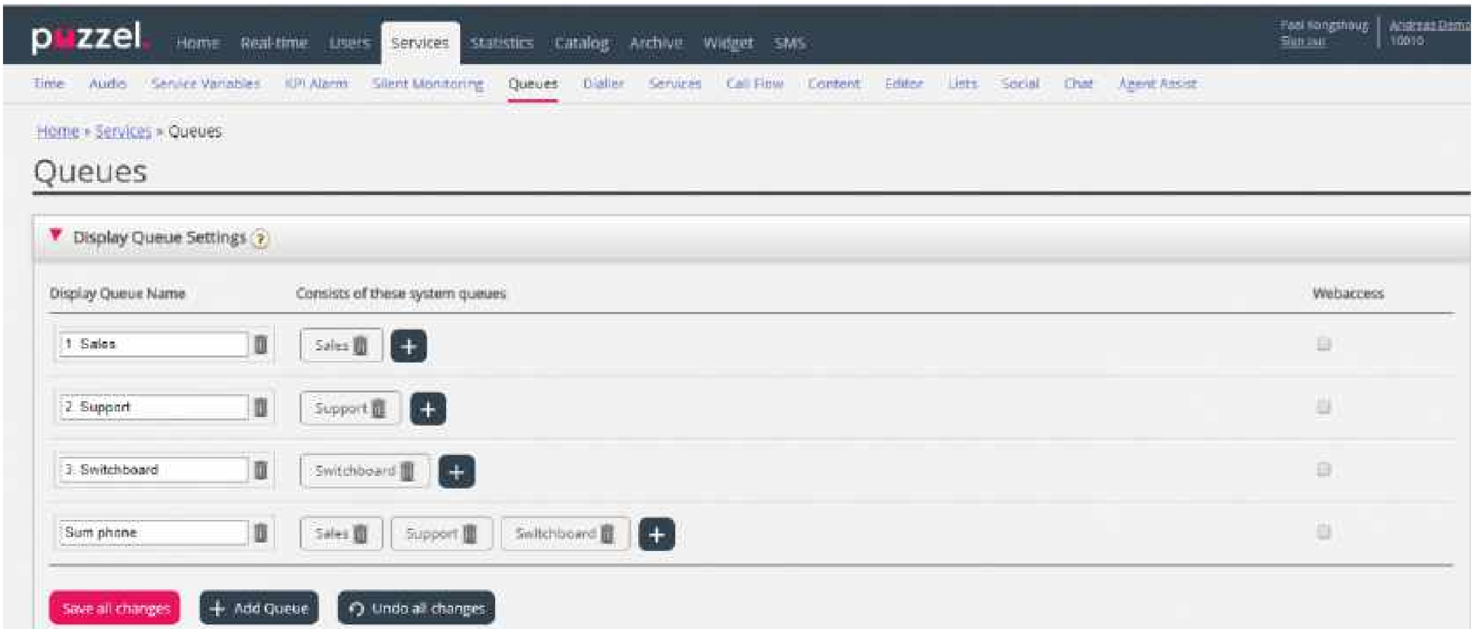


On page services - Queues you can:

- 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.

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.

Note

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

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.

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.

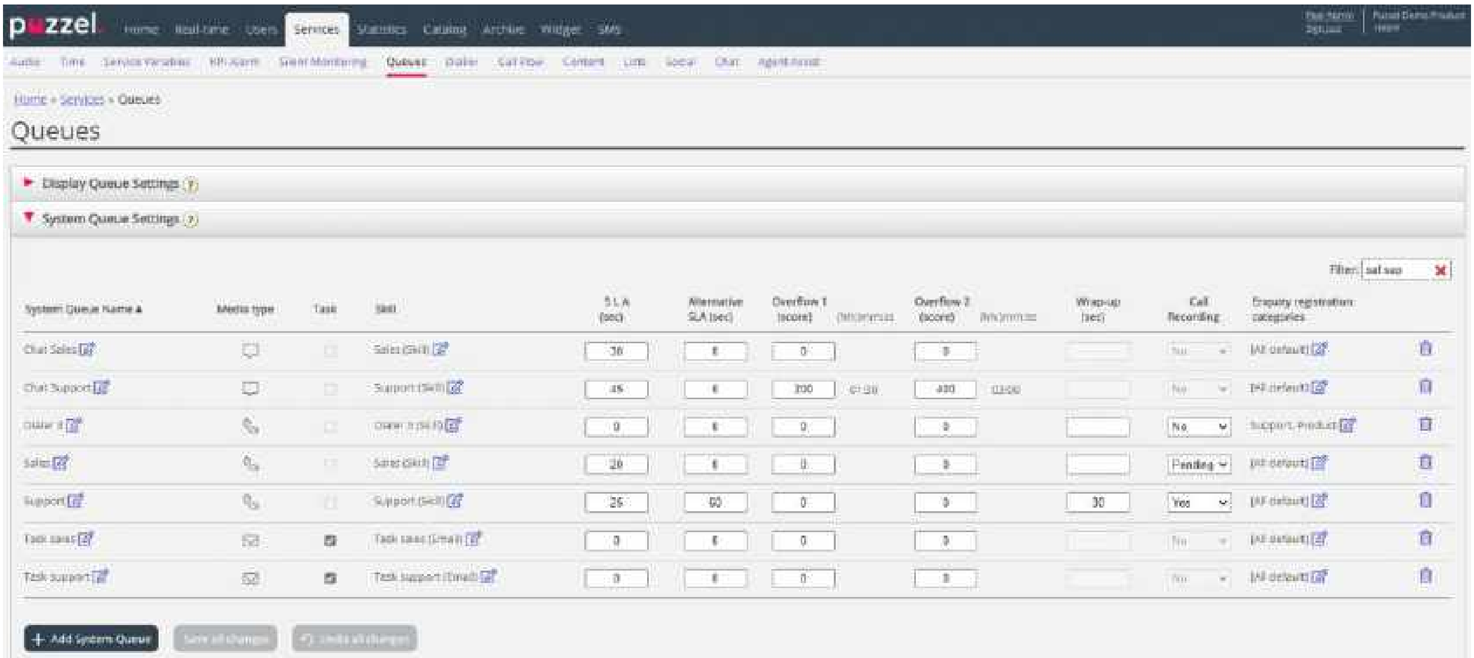
- **SLA** and Alternative SLA (details here)
- **SLA Overflow** (details here)
- **Wrap-up time**
  - If a phone queue has a pre-defined wrap-up, this value is used instead of the answering agent's pre-defined wrap-up time. See Agent Timeouts.
- **Recording**
  - Only user with access to *Recording* on page *Users - Products* can change the Recording setting per queue here.
  - If you turn on Recording (Yes) for a phone queue, this means that all calls from this queue connected to agents are recorded, and the connected agent can not stop the recording. (aka 'forced recording'). In this case, you should mention recording in the IVR.
  - If you select Recording = 'Pending', it means that calls from this queue are being recorded from when the agent is connected, but the recording file is stored only if the agent has clicked 'save recording' before the agent hangs up or transfers the call. Before you possibly choose 'Pending', we strongly advice you to consult your legal department and to inform agents about what to say to the caller if they want to click 'save recording', especially if 'pending' is used on the outgoing calls queue or for a Dialler queue, since in such cases the customer is not informed (by IVR) about recording before agent is connected.
  - Please do not turn on forced or pending recording for a queue without consulting with Puzzel if you do not already have recording on for at least one

other queue, since details about recording storage (Archive) and possible getting caller's acceptance in the IVR needs to be clarified.

- More details about recording can be found here: Call recording.

- **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.



Each system queues 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:

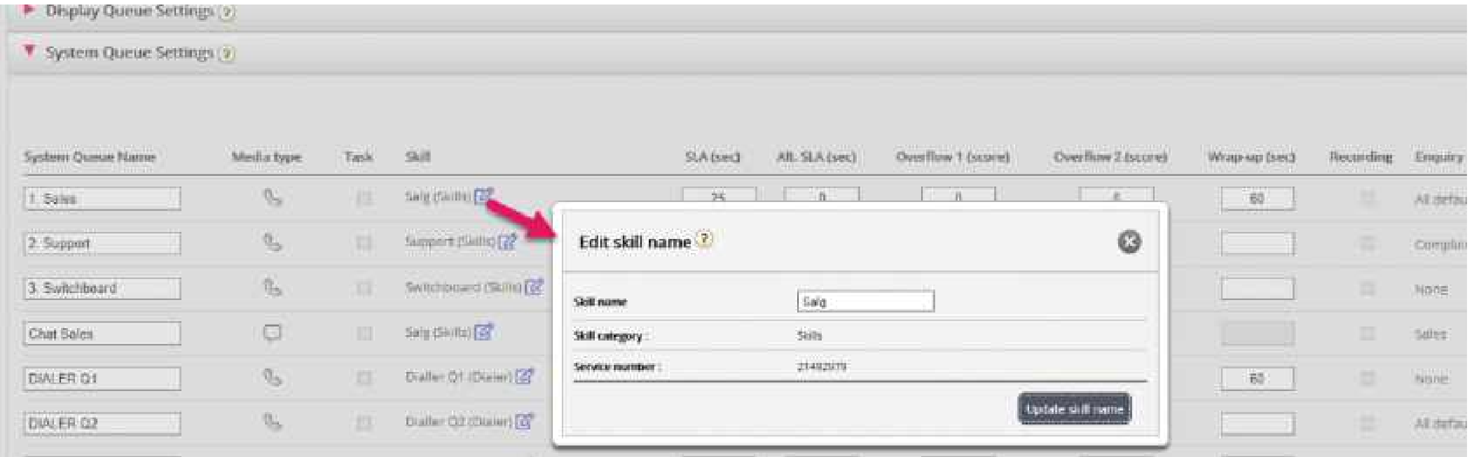
- **Phone**
- **Chat**
- **Social** (used for Facebook, Twitter, WhatsApp, Trustpilot and incoming SMS in queue)
- **Email** (used for ordinary email, etask and for Scheduled task).
    - Queues with media type email that are for Scheduled task must be marked as *Scheduled task* to appear in agent.puzzel.com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



Note

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.

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 queues shown name.
4. Queue_key: The queues id used in Archive, Satistics 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.

> Note
>
> 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

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 is used, but if you or a colleague created new queues and you realise you do not need one of them, you can delete it.

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

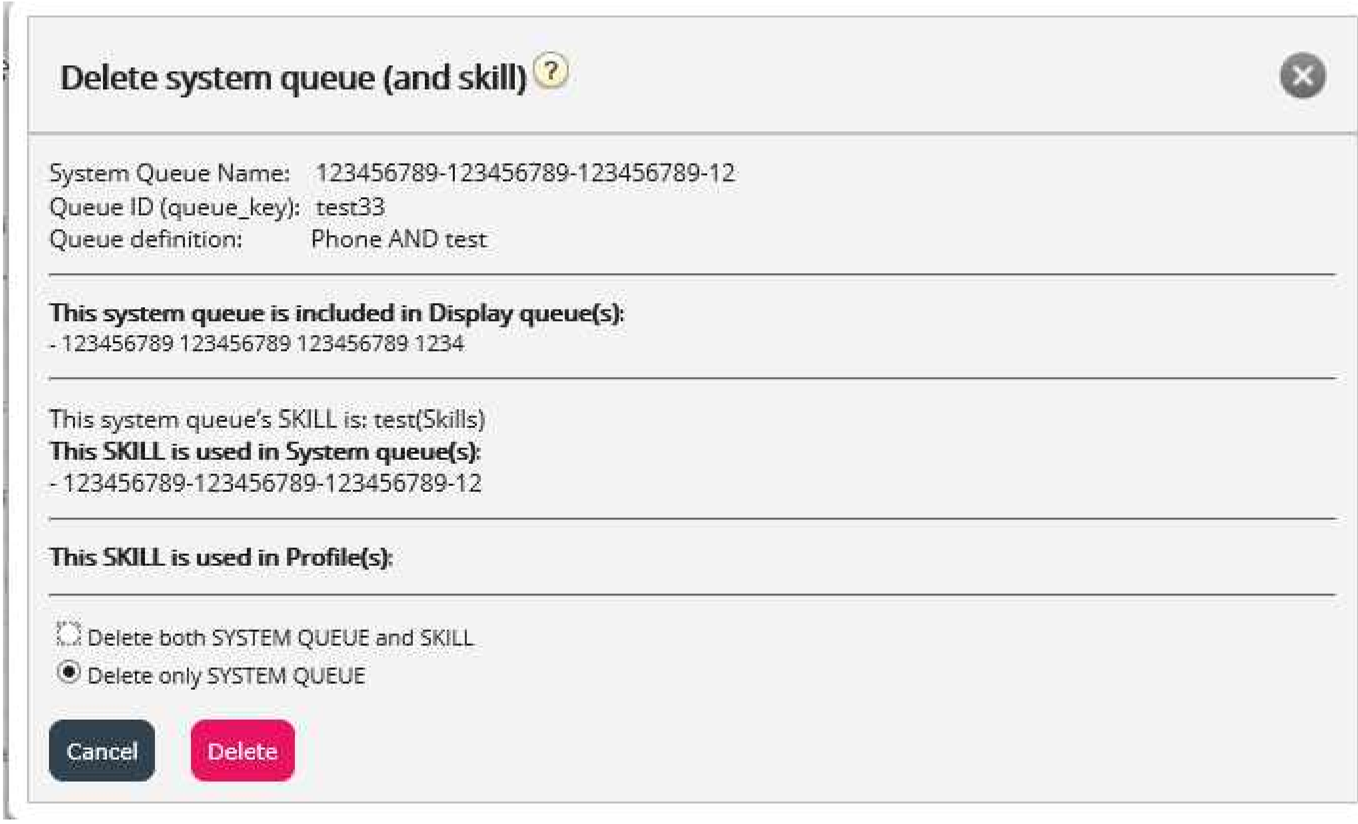
Since we do not want users to delete a queue that is in use, we will tell the user what the queue and its skill is used for before the user can choose to delete.

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 example, the system queue is used in other display queues and the skill is used in lots of profiles.



In the second 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.**

SLA

SLAs 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

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

> Note
>
> 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 Queues SLA-score in Queue overview is the request with the highest SLA-score.

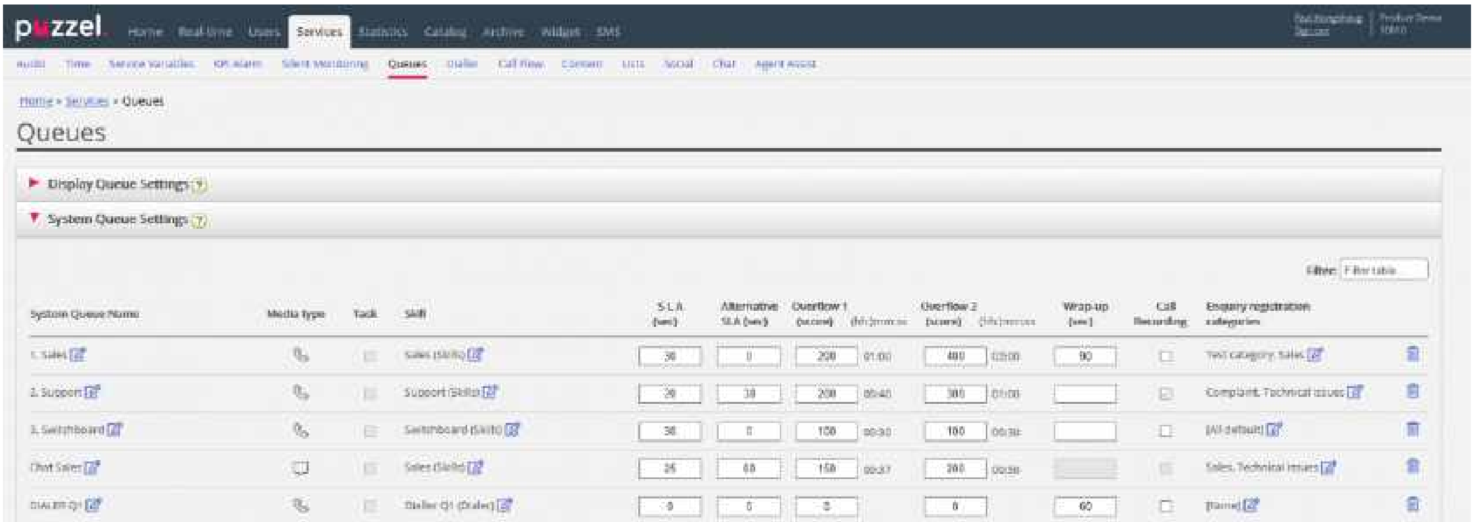
SLA Overflow

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:



- **SLA (sec)**: The queues 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.

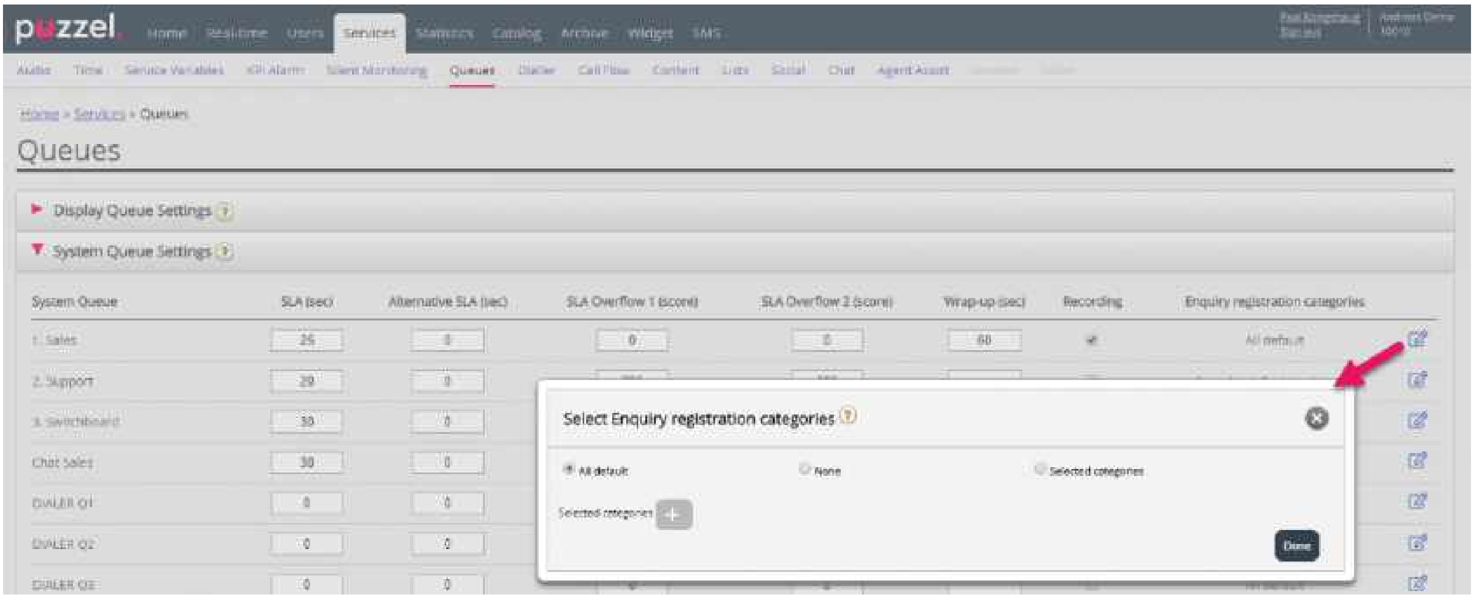
- **Alternative SLA (sec)**: Default=0 (=not in use). Define a value >0 only if you want the calculated *Answer rate within SLA* in the Ticker Queue, Wallboard and in the agent applications queue overview to be based on the Alternative SLA instead of based on the real SLA. Please note that this does 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 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.

Enquiry registration per queue

On page *Users - Enquiry registration* you define Categories and their belonging topics to be used by the agent application, and the order these categories are shown in 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.

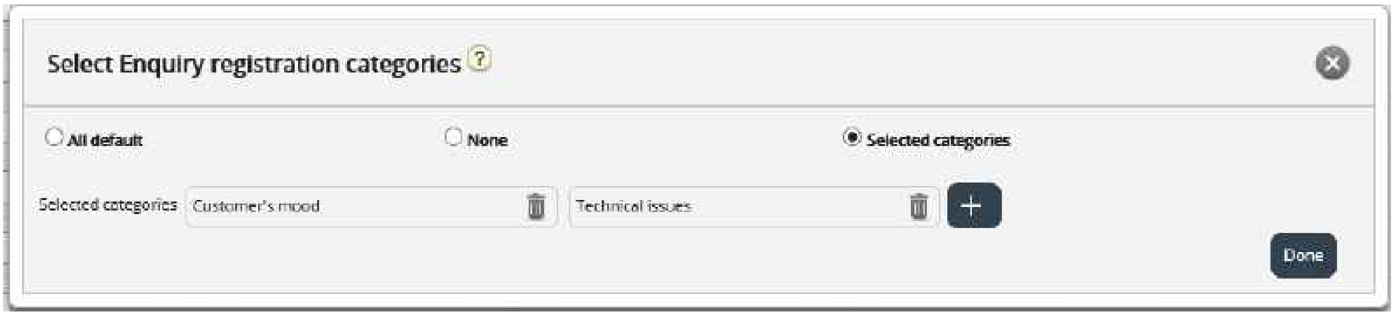
You can configure what categories to be used per queue instead of using resource filters to limit what categories different user groups can see.

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 gents for requests from this queue.
- ***Selected categories*** means that the categories you selected here are shown for agents for requests from this queue.



Please note that the selected categories for a queue might be shown in a different order here than on page Users - Enquiry registration, but the agent application shows categories in the order defined on page Users - Enquiry registration.

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*.

Allocation Algorithms

Different algorithms are used in these two different situations:

1. **No queue -** A request arrives in a queue (no other requests are waiting in), and this request can 'choose' among several ready agents (agents with capacity and skill to receive a request from this queue). The 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.
      (In this case, an agent's timestamp is updated both when a request is offered and when a request is ended, so that we can pick the 'correct' agent)

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 the queue(s) the agent has highest skill score on.

Please contact Puzzel support if you want to change algorithm.

Does Puzzel offer more than 1 request to an agent at the same time?

When an agent logs on to queue, ends pause or becomes ready after wrap-up or after ending a written request, Puzzel usually allocates one request (call or written request) to this agent, even if the agent has capacity for several written requests and agent can receive a call while having written request(s). When this first offered (written) request is accepted by agent, then we might allocate a new request to the agent if the agent has 'capacity' for more and other agents are not 'first' to receive the next written request.

If a written request is waiting in queue with the agent becoming available as '**reserved agent**' and a call is waiting in a queue that the agent has skill on, we will usually send the written request to the agent first, and within 1-2 seconds we might also offer the call unless the agent's setting was *Block phone if >* ***0*** *written requests*. With *Block phone if >****1*** *written request*, agents may experience having a call ringing and an offered written request blinking in the agent application at the same time.

Solving Customer Interactions

Reserved/preferred agent

If you want a caller/chatter/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 daysto 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 manyseconds 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 other agents.*

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 requests 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 e-task/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 Puzzels web-services requestAdd, you can provide information about each requests reserved agent and reserved time
- If you put **Scheduled tasks** in queue using Puzzels web-service RequestScheduledETaskAdd, you can provide information about each requests 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 agents 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 agents 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/or calls in queue with (much) higher SLA scores.

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

1. Allocate request reserved to agent **only if the agent is logged on to the relevant queue**(aka 'Require Skill on queue for Reserved')
2. Allocate request reserved to agent **only if the 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 or both of these options for one or more of your queues (email), please contact Puzzel Support.

puzzel. Solving Customer Interactions

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 dowith 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.

Note

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

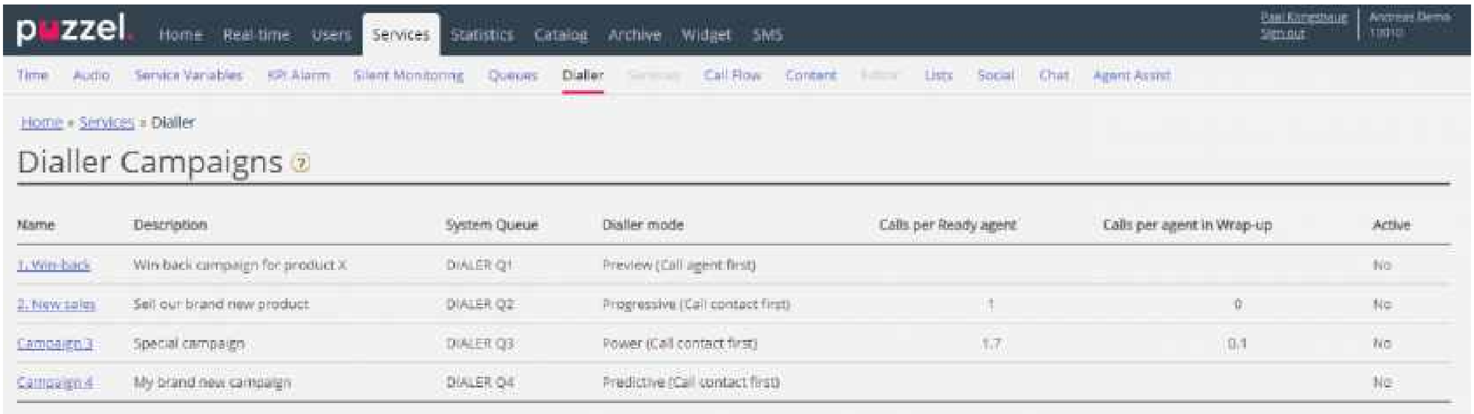
If this happens, it is probably because you forgot these requests and no agents answer this queue anymore. As an administrator, you can delete (old) emails in queue from Queue Details (under *Real-time - Queue overview*) if you know these emails/etasks should or will not be sent to agents.

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 a maximum of 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.

Solving Customer Interactions

Dialler



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.

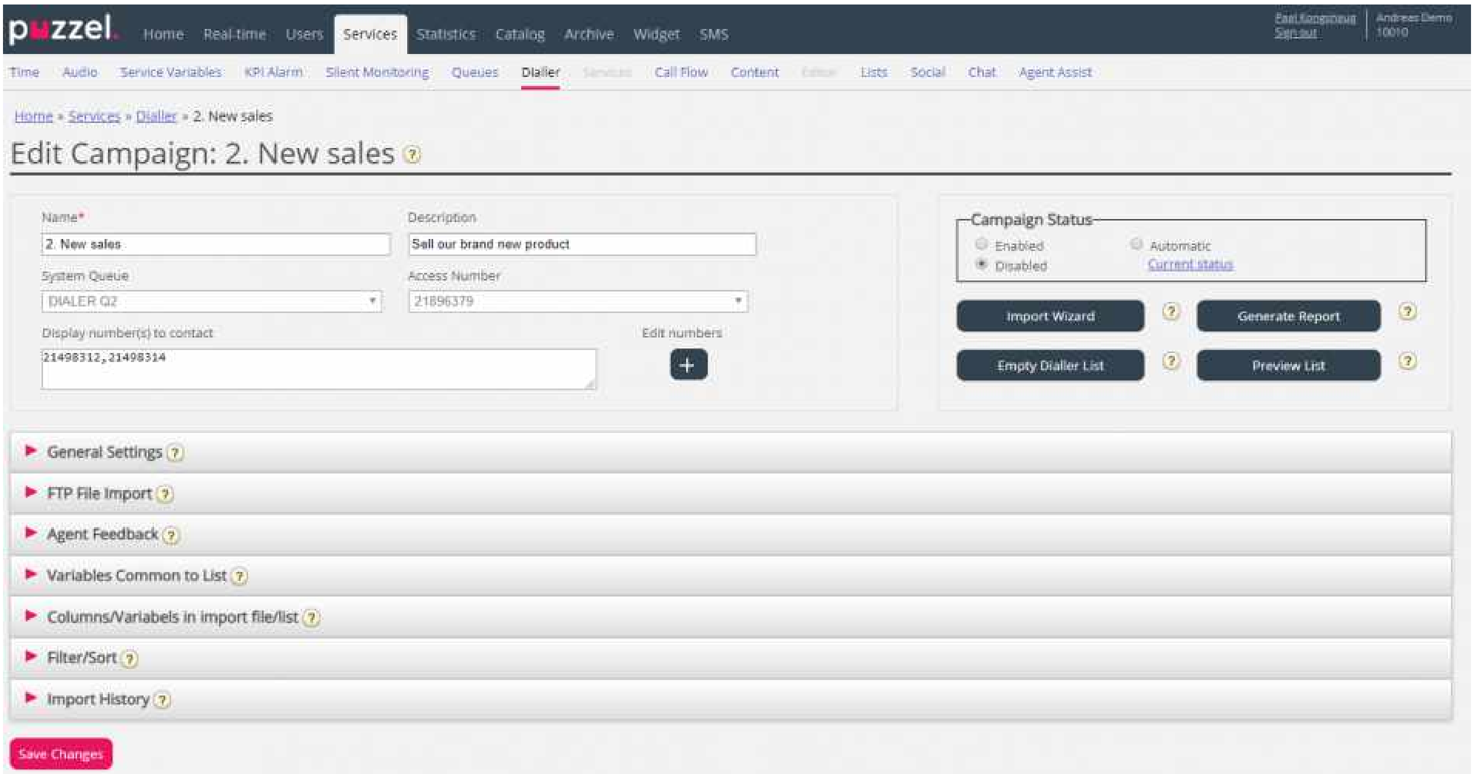
A Puzzel campaign queue uses mode *Preview* (call agent first) or *Power, Progressive* or *Predictive* (call contact first).

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 form 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:



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 the 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.

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*.

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.

Note

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".

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:

1. 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***.

2. 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).

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.

Note

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

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.

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.

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.

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.

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 ae/o/a and "o/"a/a) 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 not +44(0)3333000066. **Note** 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.

Max list size / automatic deletion of old contacts

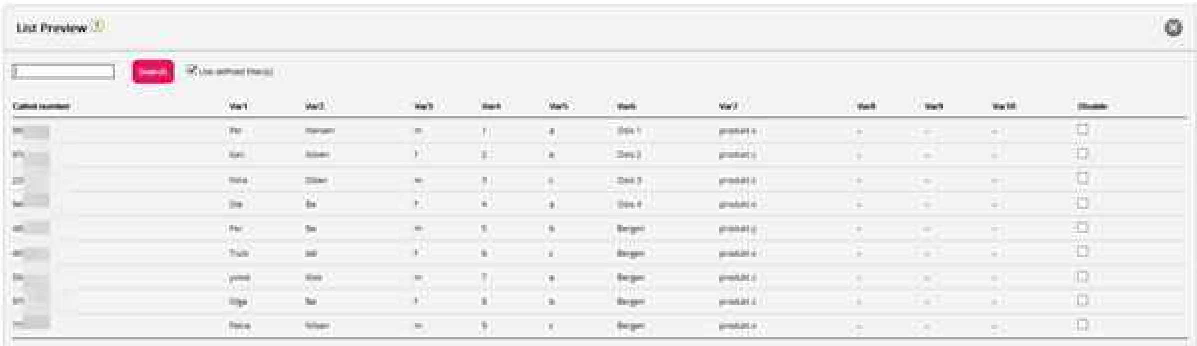
A Campaign's list can contain max 400.000 contacts. If you use Add instead of Replace when you upload new files, the list might become huge if you never empty the list.

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

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.



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.

General Settings

- **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 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 remain), but there 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 **2 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 ->) 4 contacts are called

FTP File Import

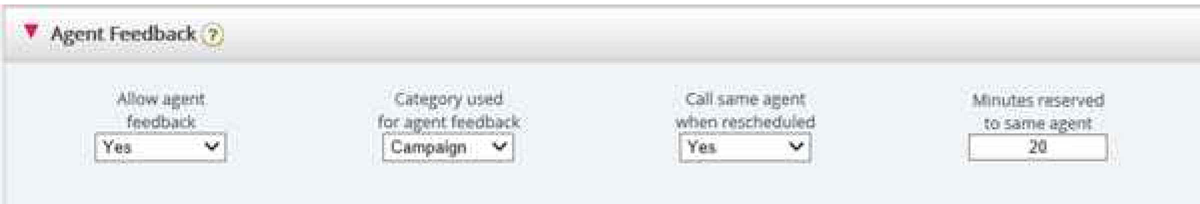
If you want to upload files to Puzzel's FTP server (using FTP over SSH) e.g. once a week that should be used by the Dialler, please contact Puzzel support to get an FTP user account. In addition, you must configure some parameters:

- **Import file from FTP server**: Must be check 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.

Agent Feedback

Configuration



If the agents should be able to give feedback (select an Enquiry registration topic, sometimes called "call outcome", and/or or der 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 and define it as *Reserved for Dialler*, and then select it here.
  - Typical outcomes (Enquiry registration topics) for answered 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.

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 child), 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).

Note

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.

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 they are 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.

Note

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 rescheduled call e.g. the next day at 18:00, the rescheduled call will be done only if the Campaign is ***enabled*** at the defined reschedule time (and agents 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 made.

Note

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.

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.

Unanswered Preview mode calls should not be rescheduled!

In Preview mode, agents will experience calling contacts that do not answer, but the **agents should <u>not</u> "mark as unanswered" nor reschedule an unanswered call since the Dialler will call the contact later if not all defined call attempts are made.**

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.

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.

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.

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.

Filter/Sort (In what order are contacts called?)

In this part, you can sort and filter the list. 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 greater than 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:

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.

Note

A filter will affect the number of rows shown when you choose Preview list!

Import History

Shows files that are imported into the list in the Puzzel database. The source will be Puzzel Admin Portal or FTP.

Import History

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	21.07.2016 15:15:50	Replaced	18	-	Completed	Puzzel Admin Portal
Dialer lang testliste med feil nr.txt	21.07.2016 14:40:33	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.

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”.

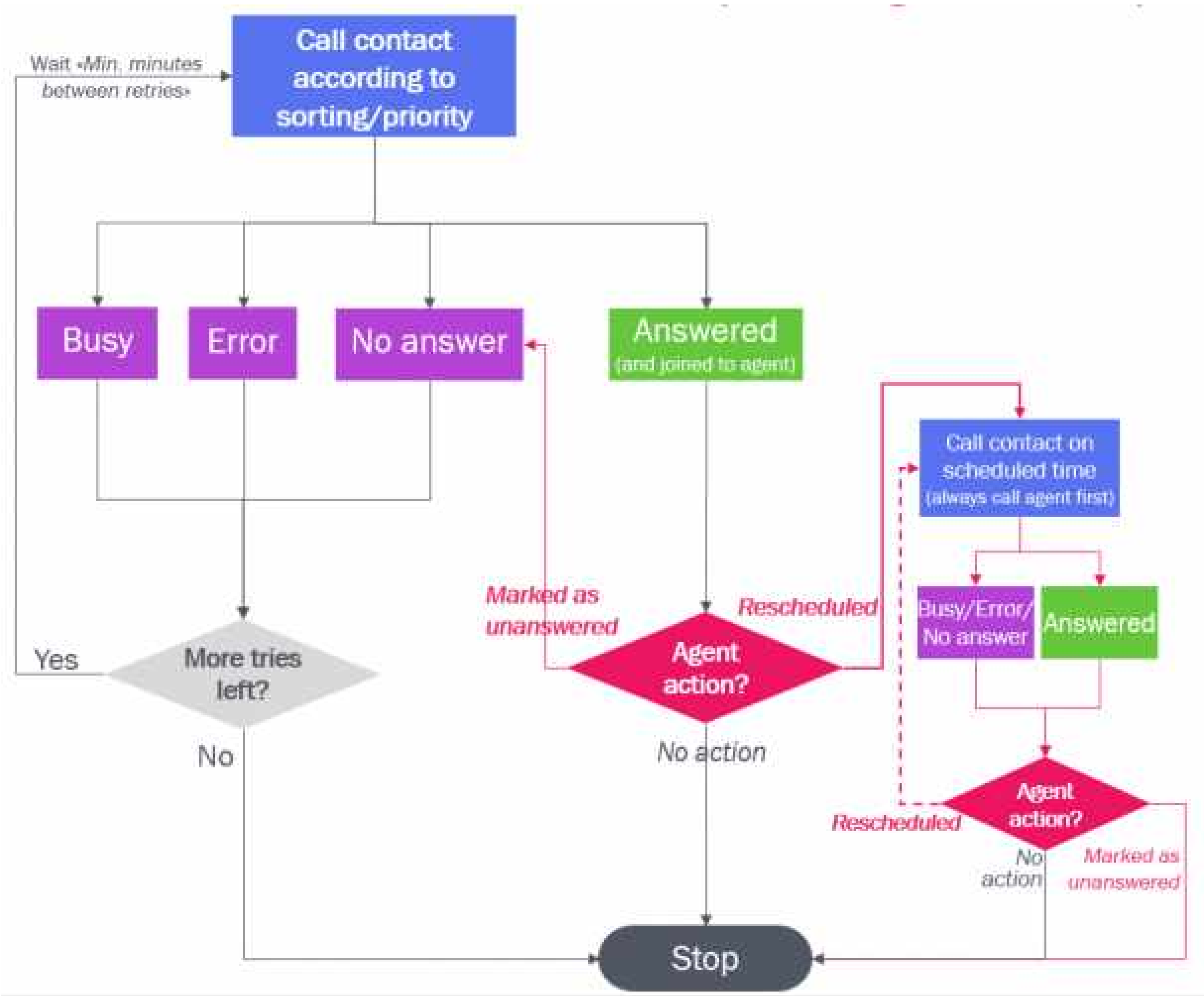
If this silent call callback to the contact is not answered, the Dialler will not call the contact again.

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.

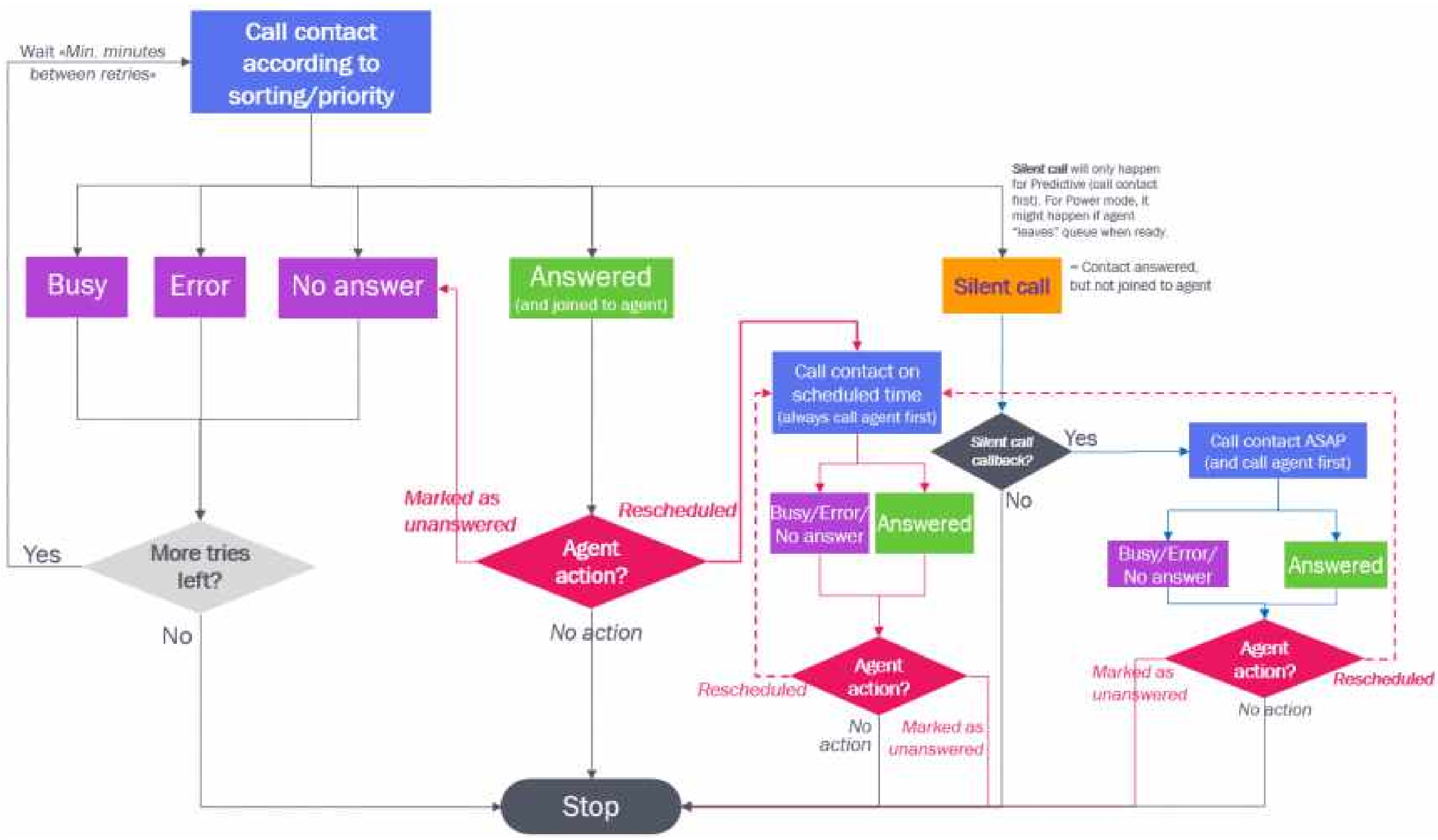
puzzel. Solving Customer Interactions

The Dialler call logic

The Dialler logic for **Preview** (call agent first) mode:



The Dialler logic for **Predictive/Power** (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 (e.g. Answered, Busy, Error, No answer)!

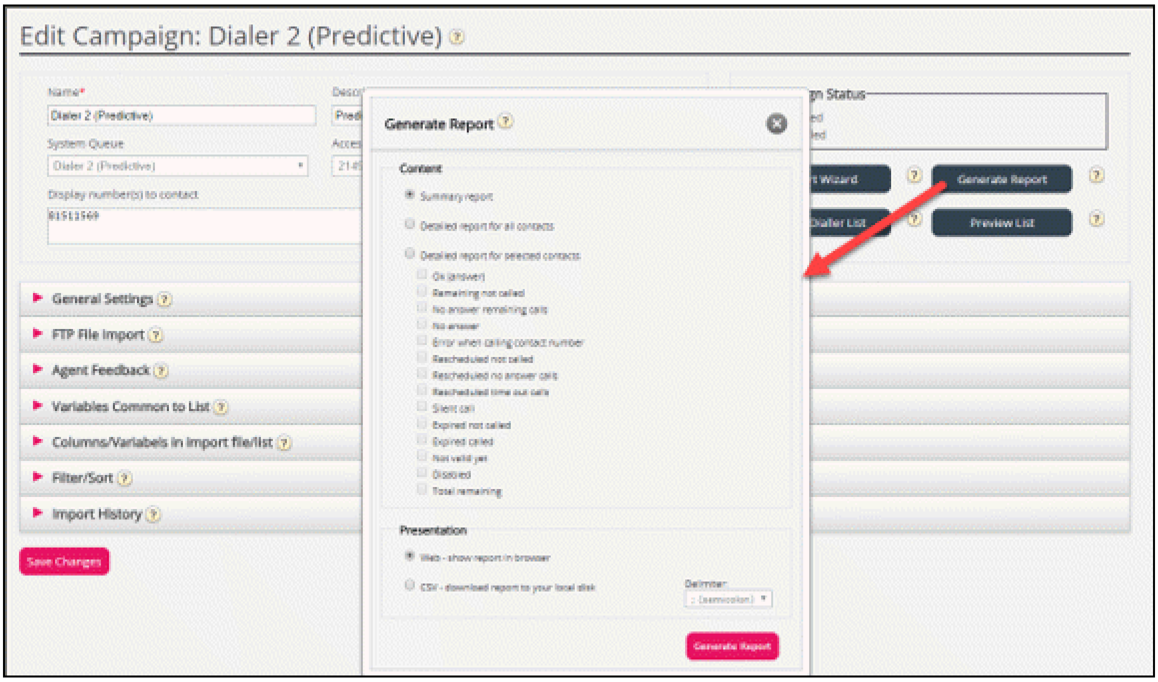
- The agent **action** *Mark as unanswered* makes the Dialler call to the answered contact once more if more tries are left and if this was not a rescheduled call or a silent call callback
- The agent **action** *Reschedule* makes the Dialler call to the contact on the scheduled time

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 Archiv, 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.

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.

#	Name	Description/Comment
2	Silent call	If Silent call callback is OFF (the default): Contacts who answered but were disconnected or hung-up since no agent was connected within the defined max time. If Silent call callback is ON, a contact that experienced a Silent call will first be reported as *Rescheduled not called*, but a few minutes later the contact will be reported as *OK* or *No answer* 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 an error signal was received for the last call. These contacts are also included in *No answer*
5	Remaining not called	Contacts the Dialler has not called to and that are not 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 neither 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)
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 report are:

Name	Explanation

Called number	The phone number the Dialler called to (phone_num from input list)
Total calls	Total number of calls done to the contact's phone number (when report was ordered).
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 desired Reschedule time
Redial comment	Comment from the agent that ordered reschedule
Redial reserved agent	If reschedule was ordered and the agent chose *To myself*, this agent's name will appear here. If reschedule to *Any agent* was chosen, no agent name is shown.
Redial set at	The time the agent registered 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

Note

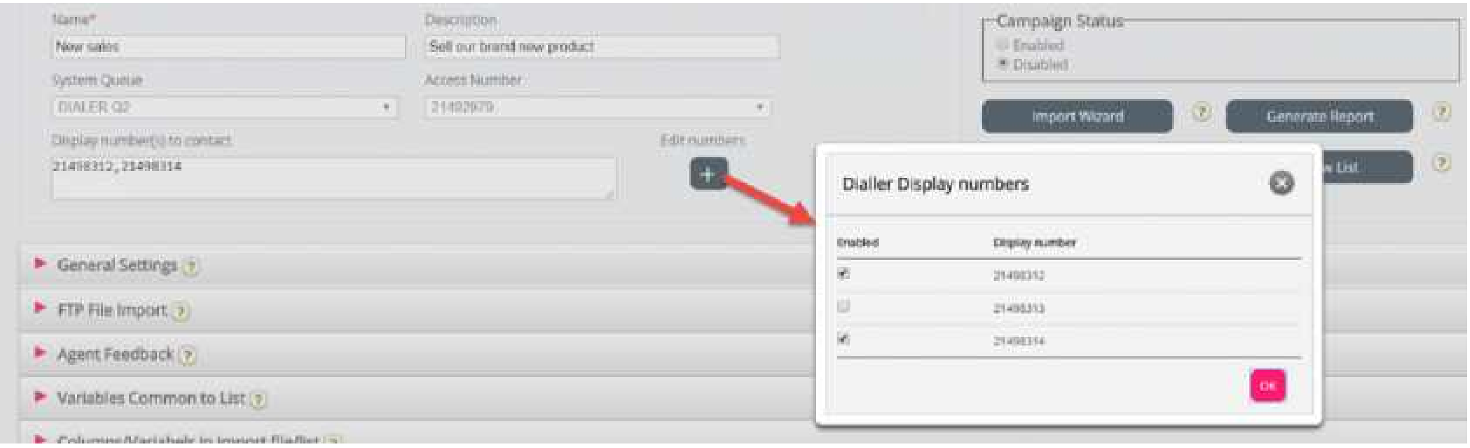
If you manually delete a single contact from a Dialler queue (not recommended), this contact will now be shown with one call too much in the Detailed report. The first time the campaign is disabled, the contacts in queue (if any) are removed, and the Total calls counter for the contact is corrected.

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 the display number instead of "Display number(s) to contact".

How to start and stop a campaign

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 and Agent feedback parameters
5. Start the Campaign by setting Campaign status to Enabled and save
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.

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 an 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 the 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.

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.

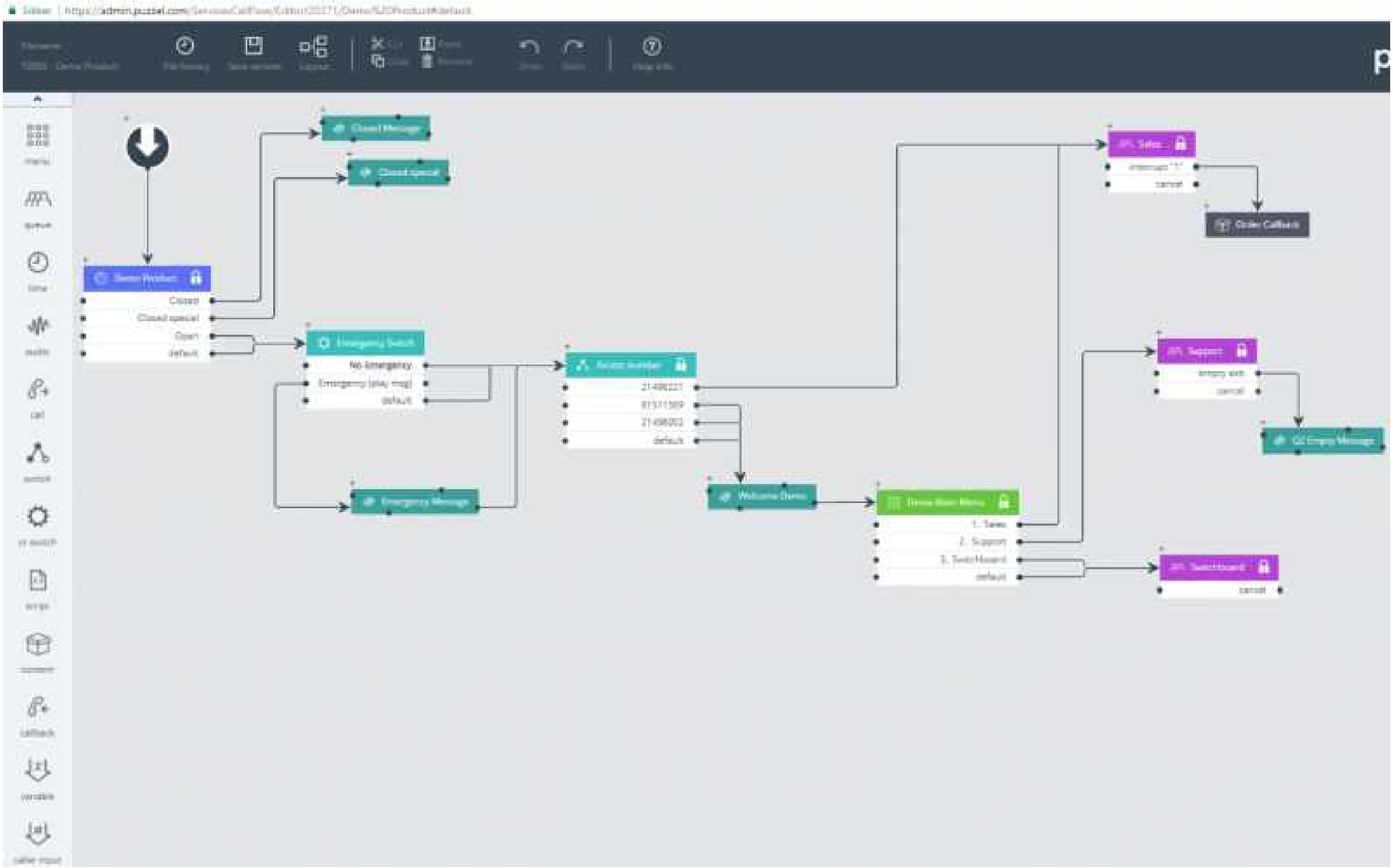
When an agent is connected to a contact's answering machine, we recommend the agent hangs up and clicks "Mark as unanswered".

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.

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 Time 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 Services Time. Please see Local Time module vs Shared/Bound Time module
Audio	The Audio module plays the selected audio file for the caller. The actual audio files (you can choose from) are maintained under Services - Audio
Menu	The Menu module presents the caller with a number of choices, and routes the caller to an exit corresponding to the entered DTMF.
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 Queue 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 Queue 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.

Module name	Description
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

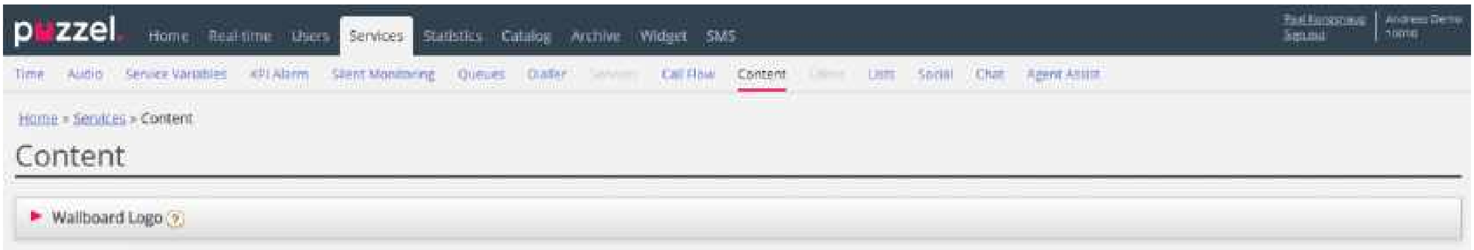
A Time module is by default “local”, but you can convert it to be “Shared”, so that several Time modules shown in Call Flow Tool can share the same opening hours and exits. If this is done, the Shared time module is shown in Admin Portal, but not “bound” ones.

Responsibility for errors and support

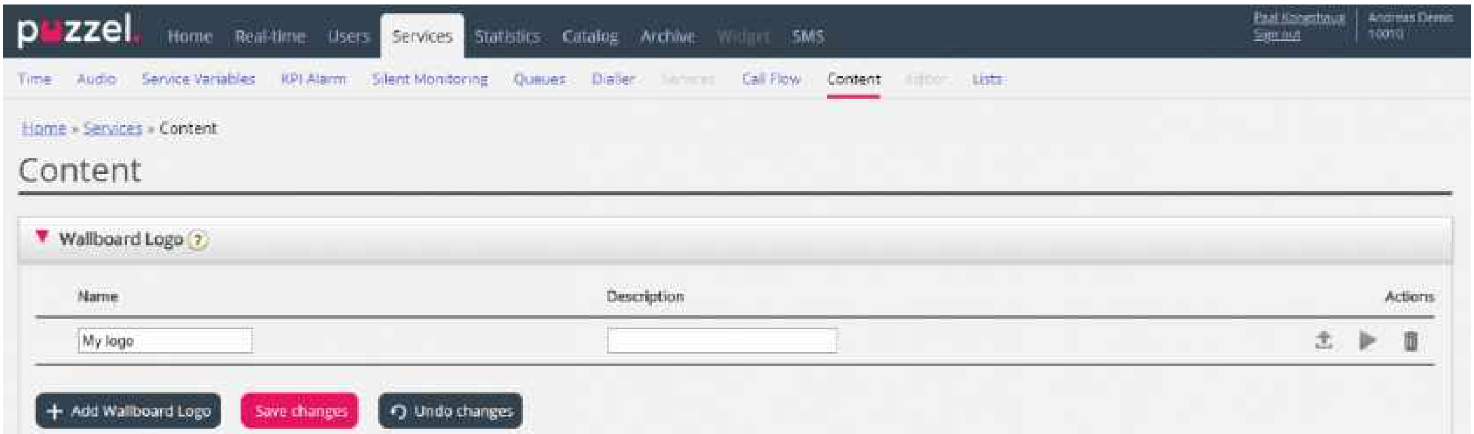
If you activate a version that does not work (at all or not as intended), and you need Puzzel support to help you, please note that we might charge you for the time spent if the error is due to "poor" configuration from your side.

Content

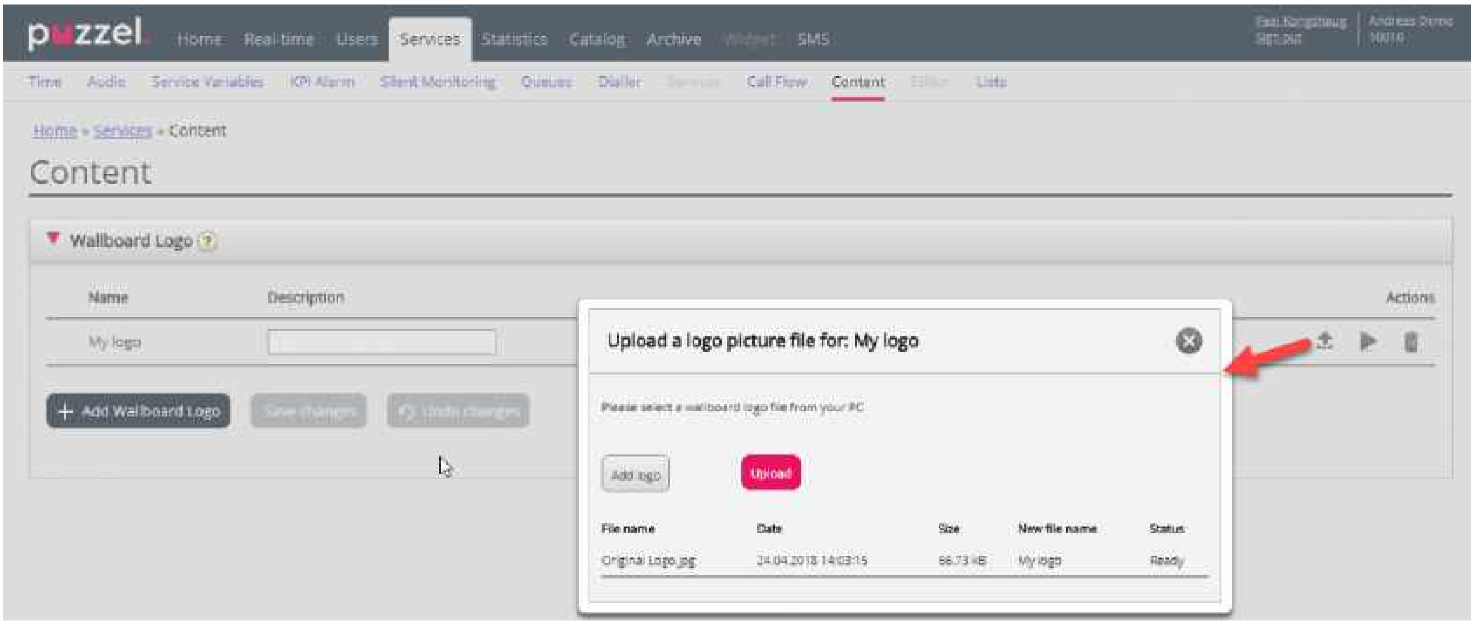
On this page, you can upload your own Wallboard logo file(s).



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.

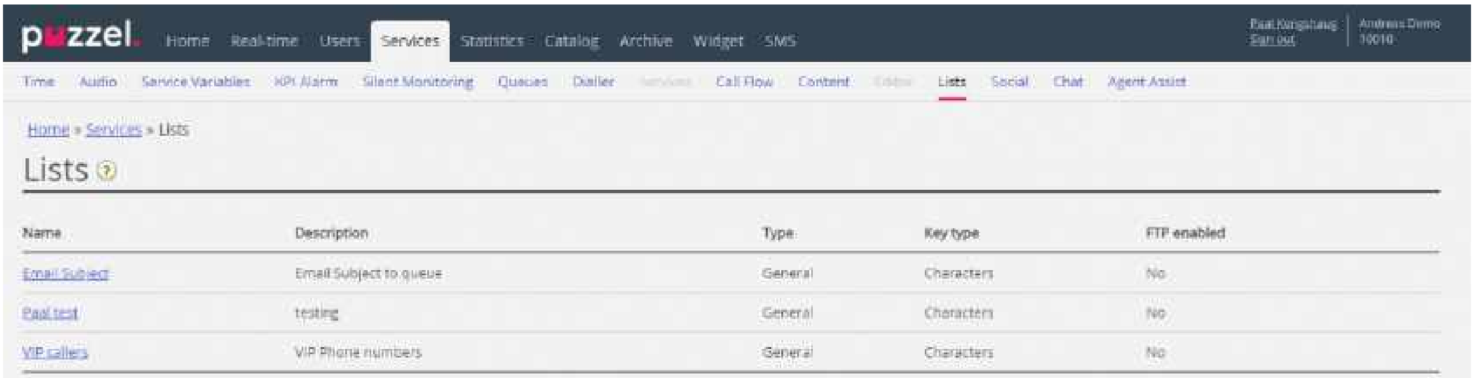


Click *Add logo*, select the correct file (png, jpg, bmp) from your computer, and when you see the file name in the window, click *Upload*. The staus will change from Ready to Finish after a short while, and then you can close the window.

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.

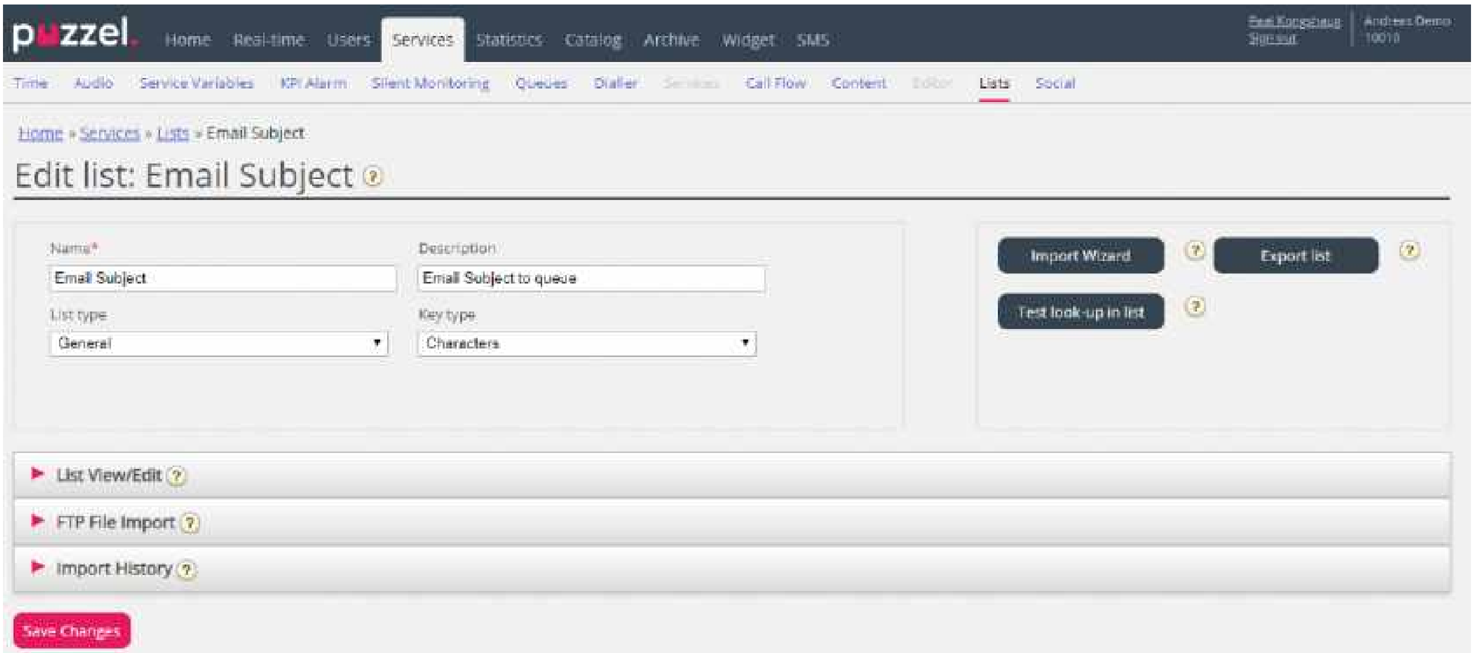
Lists

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 to the list. Instead, contact Support to ask what it is used for and perhaps to make it visible to Puzzel only.

When you click on a list, the *Edit list* page is opened:



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 valuated 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.

Note

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.

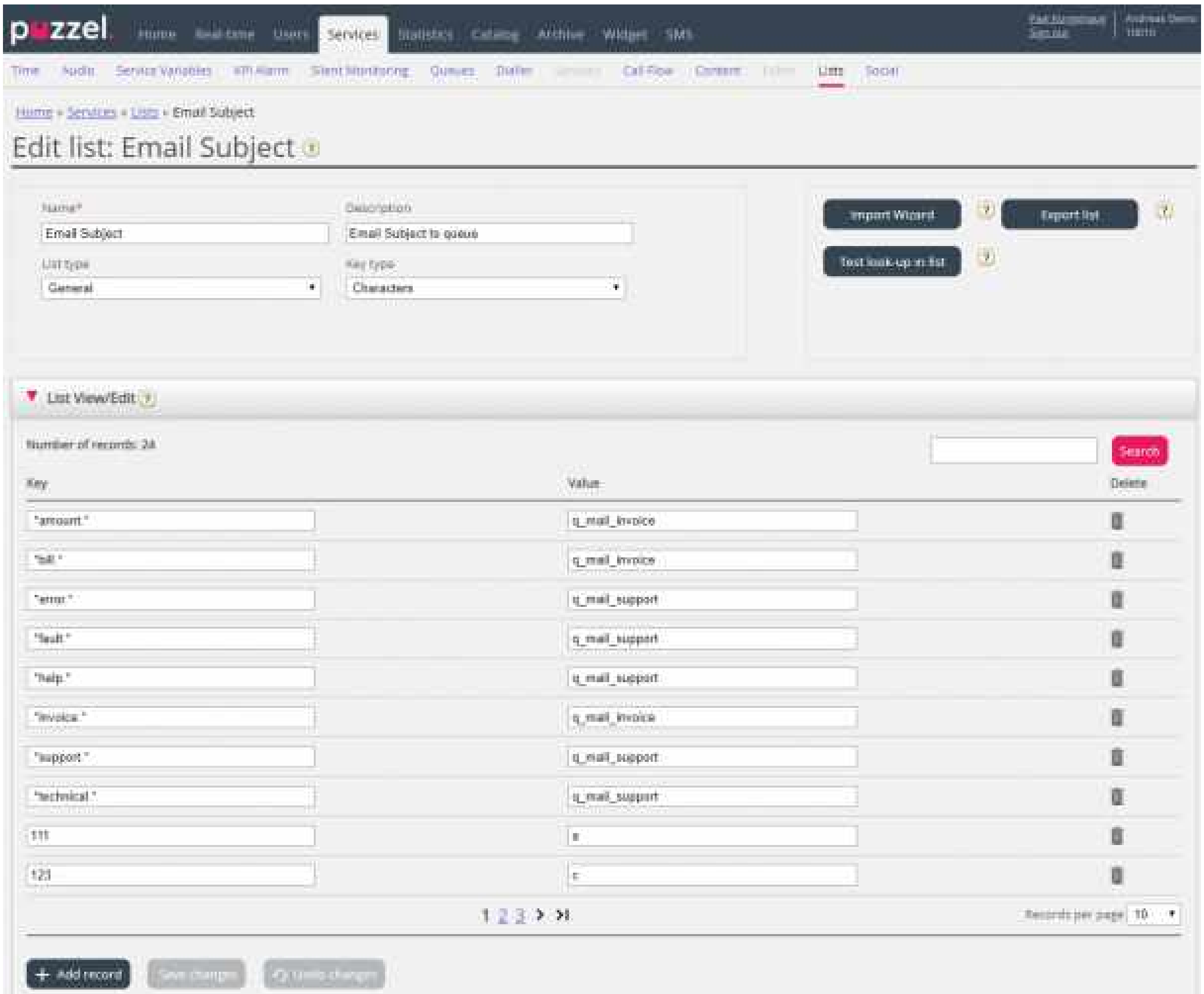
The Key type is **Integer** (digits only) or **Characters.**

Search vs Test list look-up 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.

Edit a list in Puzzel

Click on *List View/Edit* to see the records in the list and search for records.

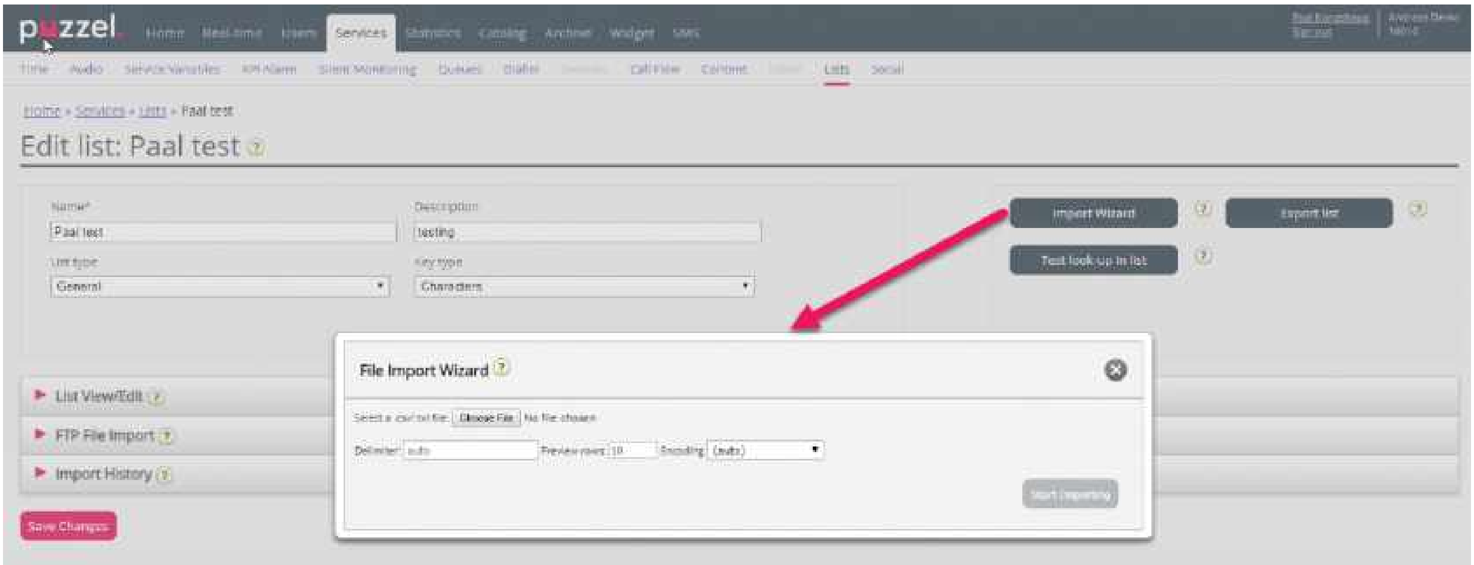


Here you can add new records, delete existing records and change content in existing records. You must click **Save changes** to store the changes done.

By default, we show 10 rows per page, but you can increase this value.

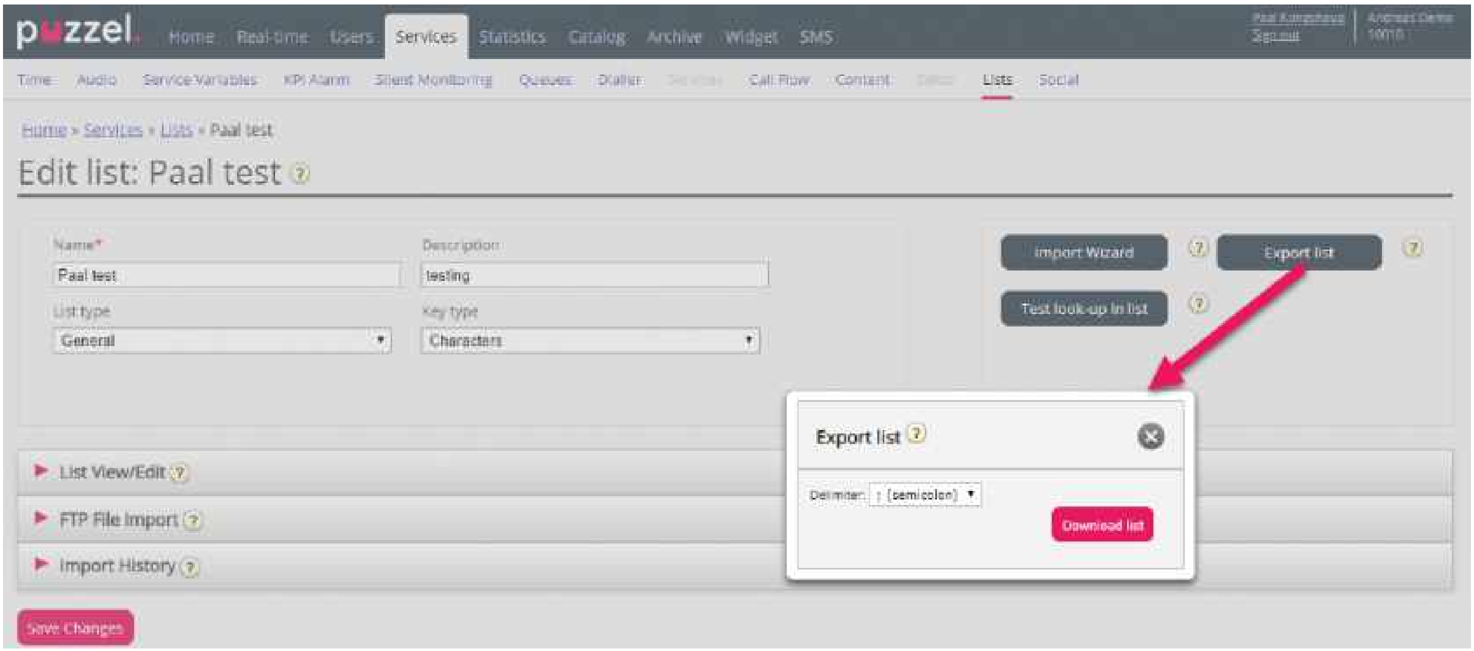
Import Wizard

If you want, you can upload a file with list content into the Admin Portal. If you do, this files 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*.



Export list

If you want to export the list content to a csv file, click *Export list*, and then *Download list*.



Solving
Customer
Interactions

FTP File import

If you want to generate a new list to a file e.g. each night or week and put it on Puzzels FTP server, so that Puzzel can import it, we can configure that this is done. You need an FTP user account for Puzzels FTP server, and FTP File import must be enabled, and the correct filename must be entered under FTP File Import.

Matching, wildcards and ranges

In a list-lookup, we will test if there exist any records in the list where **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 a 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** Combinations 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. a 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	47.*
Match for numbers starting with 47, and which are 10 digits in total length (i.e. eight digits after 47)	47........
Match any number starting with 47 and ending with 99. Between the starting 47 and the ending 99, there should be at least two characters.	47...*99
Match for text ending with abc	.*abc

Description	Key
Match for text beginning with abc	abc.*
Match for text containing abc	.*abc.*

Advanced:

Quoting needed for the wildcard characters

If a single dot is going to be part of the key, and not treated as a wildcard, you need to prefix (escape) 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 part of the key without the backslash. Examples, quoting:

Description	Key
Make a Key that should match an incoming Key with the fixed value 47*1	47*1
Make a Key that should match an incoming Key starting with 47, then it should have one character of any kind, immediately followed by *9 (sample of such an incoming Key is 473*9)	47.*9
Make a Key that should match an incoming Key with the fixed value 47.1.	47\.1

Substitution:

A return value (from the match in the look-up) can be manipulated so it contains parts of (or the whole) incoming Key. This is how:

- A wildcard expression might be surrounded by parentheses, 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 wilcard 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.

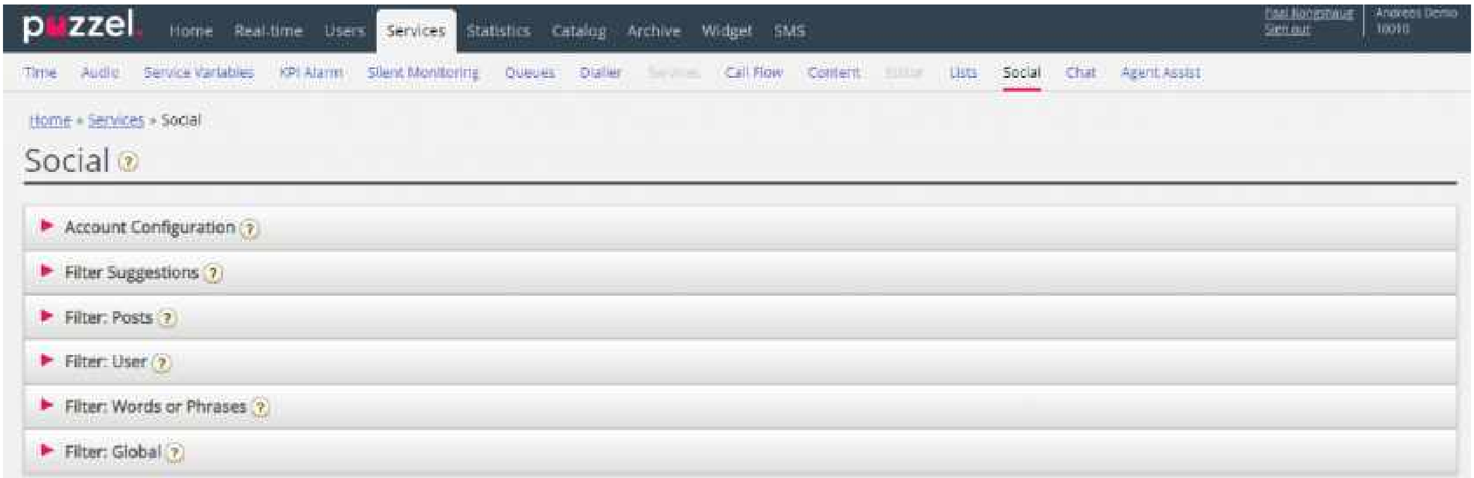
Examples:

Description	Set Key to	Set Value to

Any incoming Key starting with 22, and which are exactly 8 digits, should be prefixed with the value 0047	22(......)	004722$1
Incoming Key starting with 0047, and containing an unknown number of characters thereafter, should have 0047 stripped off.	0047(.*)	$1

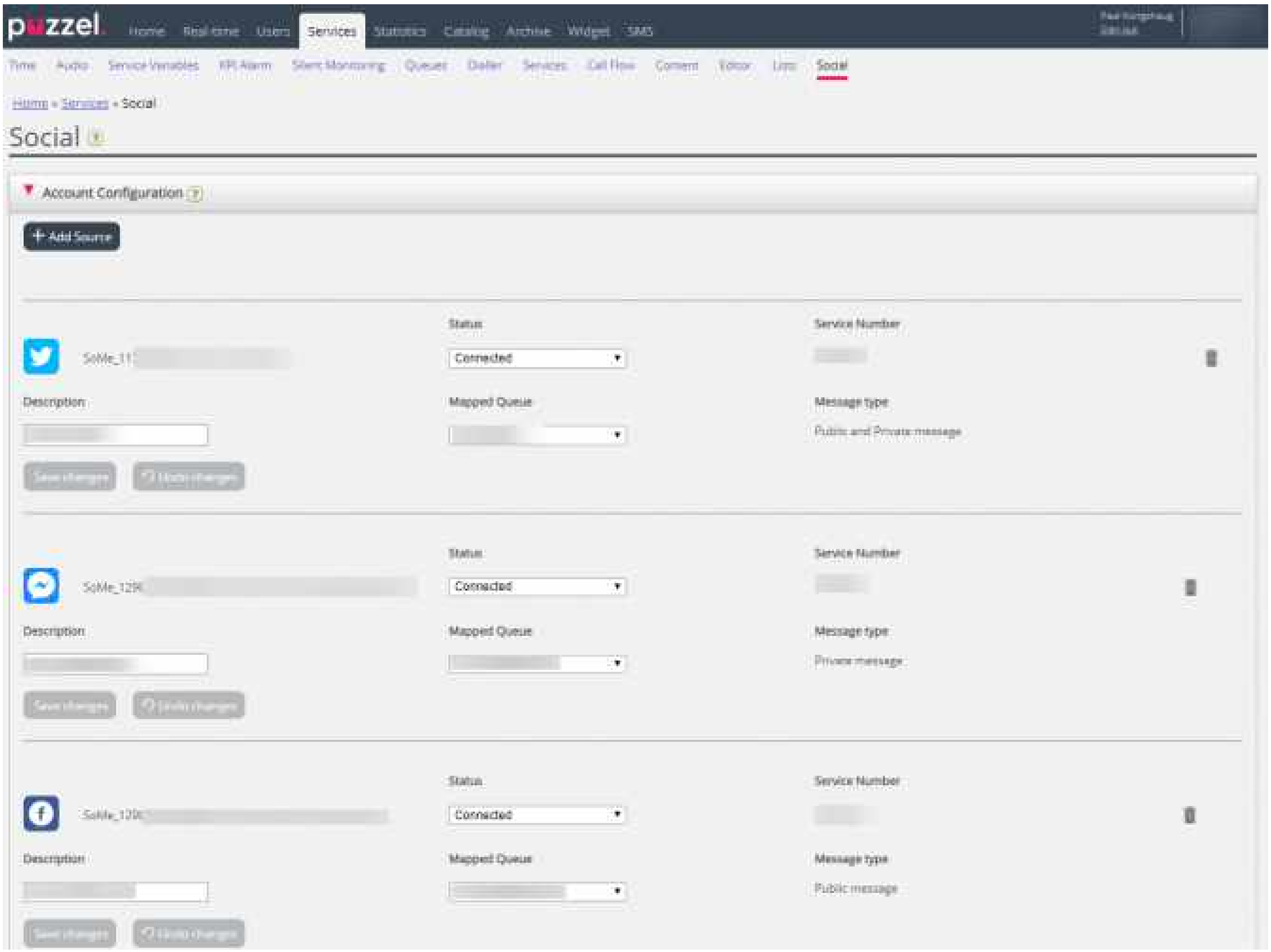
Social media

On the 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).



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.



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 Portals 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.

Chat configuration

Introduction

This article describes how to set up and configure your live chat solution through the administration portal (released October 2020). If you are using our previous chat solution you must relate to another article found here: https://help.puzzel.com/product-documents/technical-specs/web-chat-setup-and-configuration**.**

> Note
>
> You can check which chat solution you are currently using, by looking in your web site's code...
>
> The old chat solution points to the following URL: **https://chat.puzzel.com/content/client**
> The new chat solution points to the following URL: **https://euwa.puzzel.com/loader.**
>
> Both the old and new chat solution will be available in parallel for a while ahead, but the current end goal is that all customers use the new chat solution within the end of 2021.
>
> Our new chat solution uses Azure to make the chat application loader available for downloading to the web sites. The Azure location is "Europe West". Newer Puzzel contracts include Microsoft as a sub-processor, but older contracts will need this to be added manually. Before using the new chat solution, be sure to coordinate with compliance and security teams to ensure that documentation is updated including the data processing agreement (DPA) with Puzzel.

Also be aware that the IP-addresses used for communication with the Puzzel services will be different for services in Azure. Customers will need to ensure that any firewall restrictions in place are updated to allow access to the service.

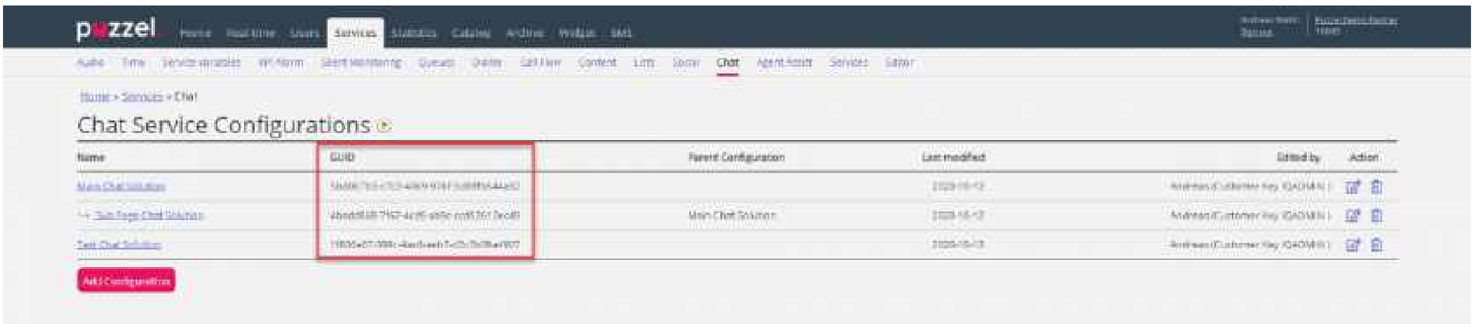
Our new chat solution does not yet support all features and properties in Chat Admin. See separate sub-article for an overview over features not yet supported.

Adding chat configurations

Most of the chat set up is done from the administration portal under "Services -> Chat" hereafter referred to as "Chat Admin", but the set-up also requires a code snippet being added to your web site (the web pages supporting chat). Here you can add one or more configurations based on how many chat solutions your web site requires. Each configuration will generate a unique ID (GUID) that you must point to from your web site(s).

As default a configuration is considered to be independent and "parent", but you can define a configuration to be a "child" configuration to another configuration. The purpose of child-parent configurations is to add configuration flexibility. A web site pointing to a child configuration will use it's properties if defined, and the equivalent properties in the parent configuration if not. With this you can define all general settings (common for all web sites) in a parent configuration and define divergences (for one or some web sites) in child configurations.

A configuration can be defined as child both upon creating it, or later (by clicking on the configuration row's right hand edit button).



When only using parent configurations:

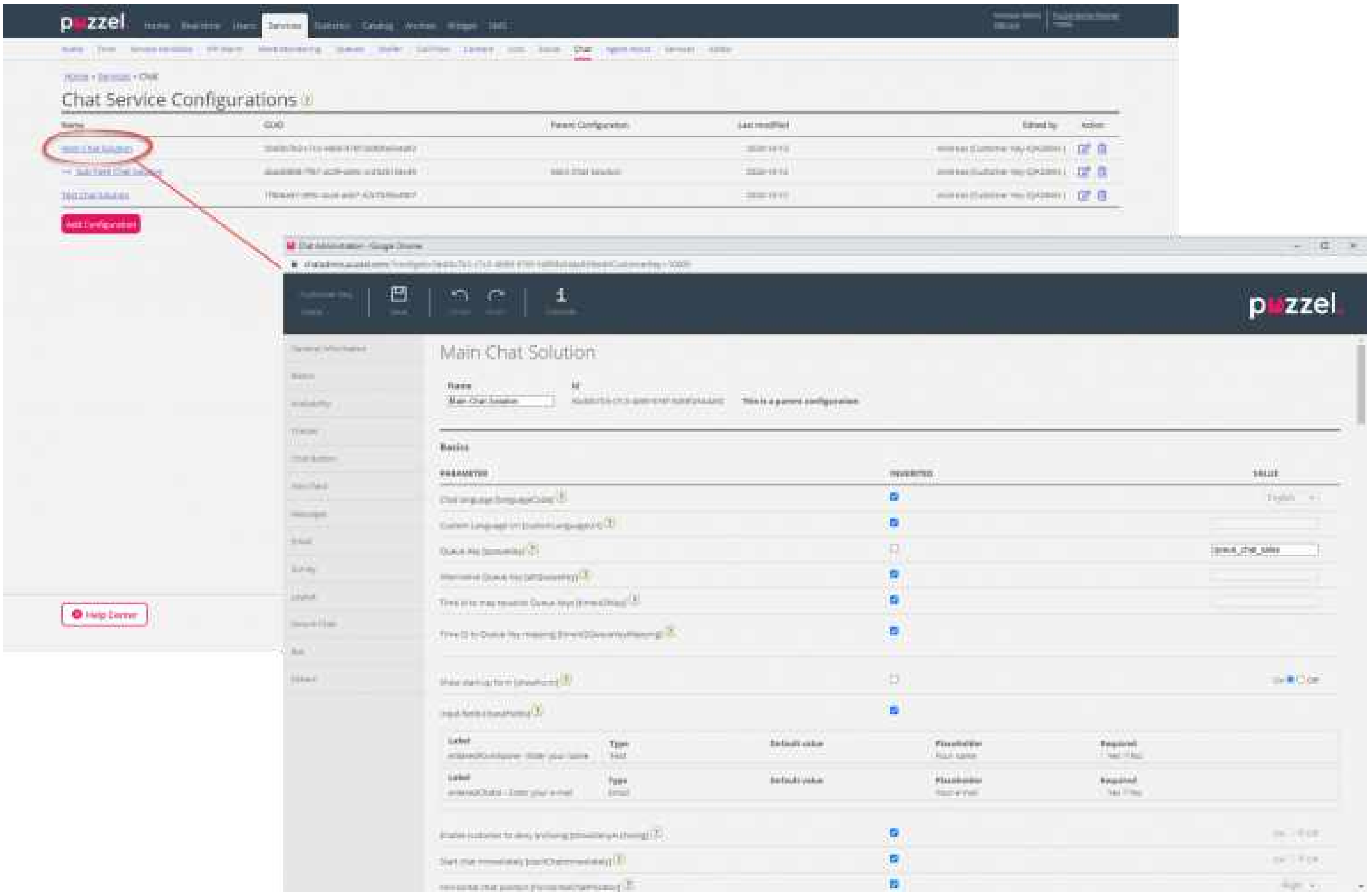
- If a property is defined in a parent configuration is used.
- If a property not defined in a parent configuration, the equivalent property's system default value is used.

When using both child and parent configurations:

- If a property is defined in a child configuration, it is used.
- If a property is not defined in a child configuration, the equivalent property in the parent configuration is used.
- If a property is defined in both a child and parent configuration, the property in the child configuration is used.
- If a property is neither defined in a parent or child configuration, the equivalent property's system default value is used.

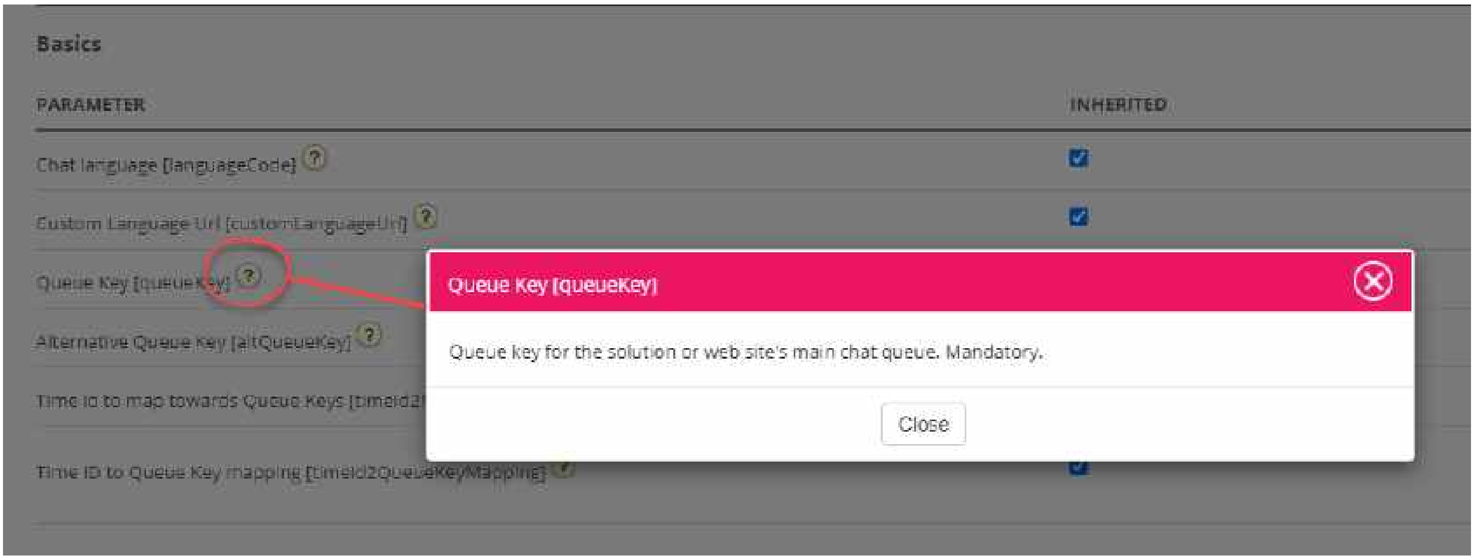
Editing Chat Properties

To edit a chat configuration, simply click on the relevant configuration name to open it in a seperate window.



As a starting point, all property values are inherited from the level above - If it is a child configuration values are inherited from the parent configuration. If it is a parent configuration values are inherited from the system default.

To understand the different properties and what they do, we have added explaining help texts next to each property. If you have questions about a property, click on it's belonging to question mark icon.



> **Note**
>
> Most properties are optional, but there is one essential mandatory property that must be defined for the chat to work, and that's the **system queue key**. The system queue key is found in the "Services" part of the admin portal under "Services -> Services -> <service number> -> Queues" (in the ID (queue_key) column).

Associate you web sites to a configuration

In order for your web site(s) to know what is configured, they must be set up to point to the correct configuration in Chat Admin. There are two properties required in the code - **customer key** and **configuration ID**. See test page here: https://demo.puzzel.com/euwa/ (choose relevant page and right-click select "View page source"), or see example below.

```
<!DOCTYPE html>
<html lang="en" dir="ltr">
    <head>
        <meta charset="utf-8" />
        <meta name="viewport" content="width=device-width, initial-scale=1"
/>
        <title>Puzzel Chat</title>
        <link
href="https://fonts.googleapis.com/css?family=Open+Sans:300,400,600,700&display=
ext"
              rel="stylesheet" />
        <style type="text/css">
            html,
```



```
            body {
                width: 100%;
                height: 100%;
                padding: 0;
                margin: 0;
            }
            [data-puzzel-chat] {                font-family: 'Open Sans',
sans-serif;
            }
        </style>
    </head>
    <body>
        <script type="text/javascript">
            (function(a, b, c, d) {
                b.PUZZEL_EUWA_CONFIG = {customerKey: c, configId:
d};
                var loader = a.createElement('script');
                loader.src =
'https://euwa.puzzel.com/loader/index.js';
                a.body.append(loader);
                loader.onload = function () {
                    new
EUWALoader(b.PUZZEL_EUWA_CONFIG).load();
                }            })(document, window, '10005', '5bd0b7b3-c7c3-
4069-976f-5d89fa544a92');
        </script>
    </body></html>
```

On all web pages where you want the chat to be available, the chat code must be added. Also if you want an ongoing chat to be persistent when navigating between pages, the code must be on added to all the relevant pages. If you want an ongoing chat to be persistent on a page but not offer starting a new chat, we recommend that you refer that page to a child configuration where the only property defined is the chat button not being shown, the rest of the configuration will be read from the parent configuration.

> Note
>
> Note that this merely is an example of how the code can look on you site. The code on your web sites can deviate somewhat.
> Check out some more examples here: https://demo.puzzel.com/euwa (choose a page from the list and view the page source, to see code)

Cookies and localStorage

This version of our chat does not use cookies, only the browsers local storage. **localStorage** is a property that allows JavaScript sites and apps to save key/value pairs in a web browser with no expiration date. This means the data stored in the browser will persist even after the browser window is closed.

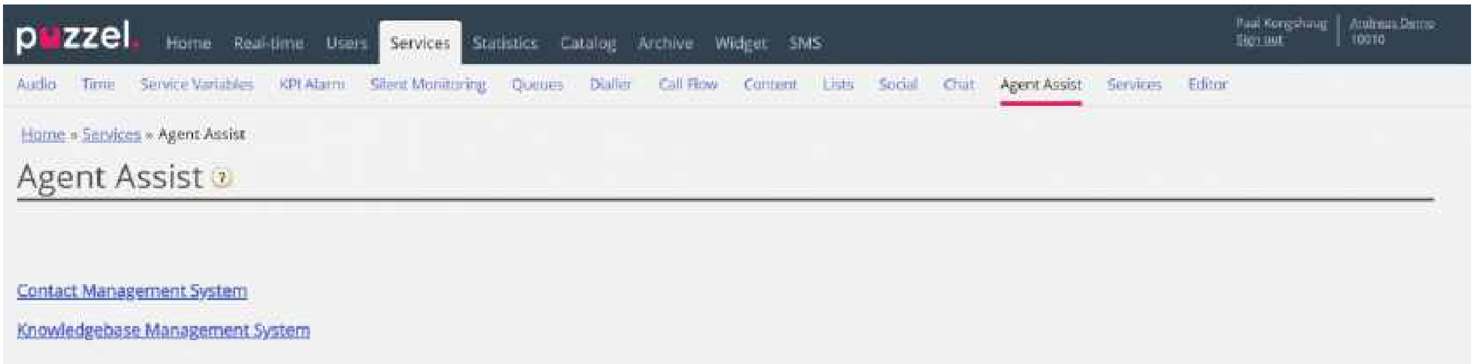
Here's a list of localStorage-keys that are used:

- [euwa_chat]chatId
- [euwa_chat]denyArchiving
- [euwa_chat]initialQueueKey
- [euwa_chat]lastQueuePositionTime
- [euwa_chat]nickName
- [euwa_chat]pageTracker
- [euwa_chat]requestId
- [euwa_chat]session
- [euwa_chat]sessionId
- [euwa_chat]startFormVariables
- [euwa_chat]subject
- [euwa_chat]windowRect
- [euwa_chat]authCode

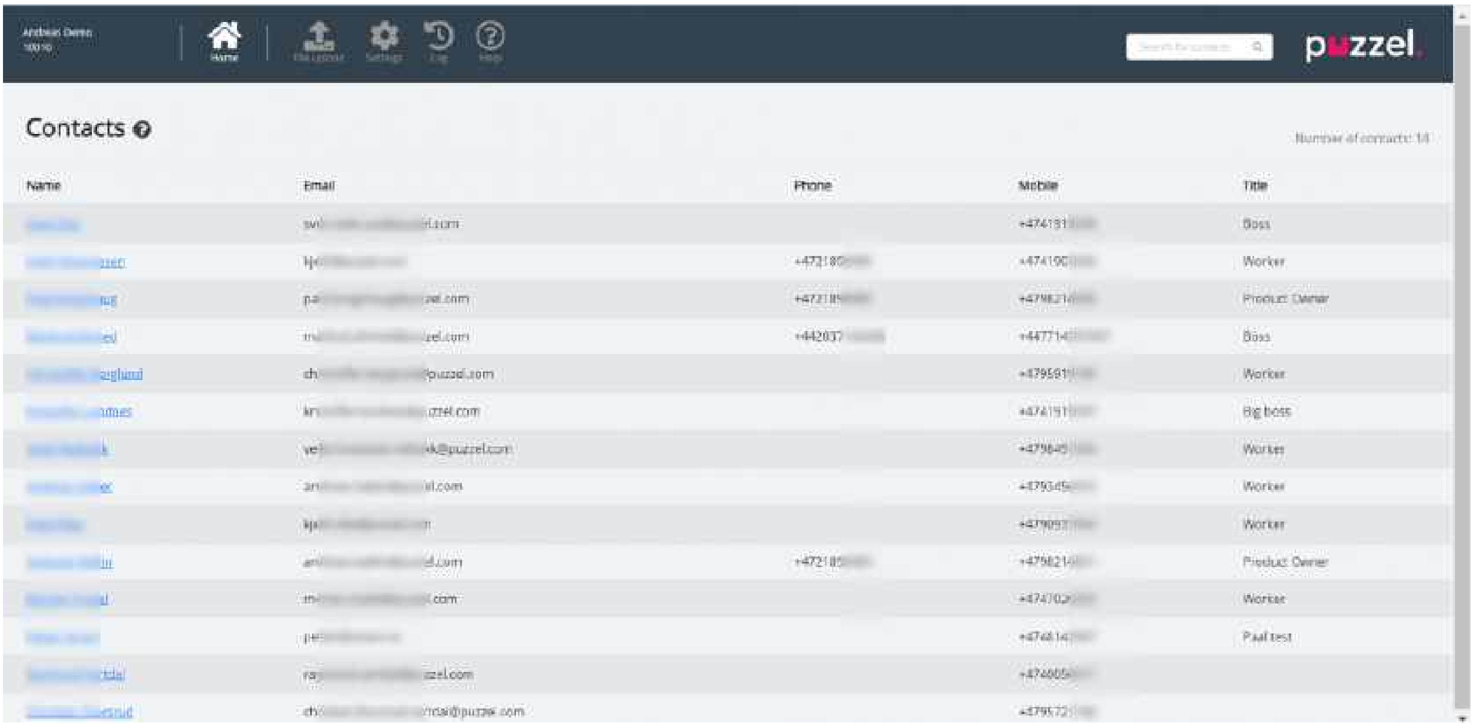
Solving Customer Interactions

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.

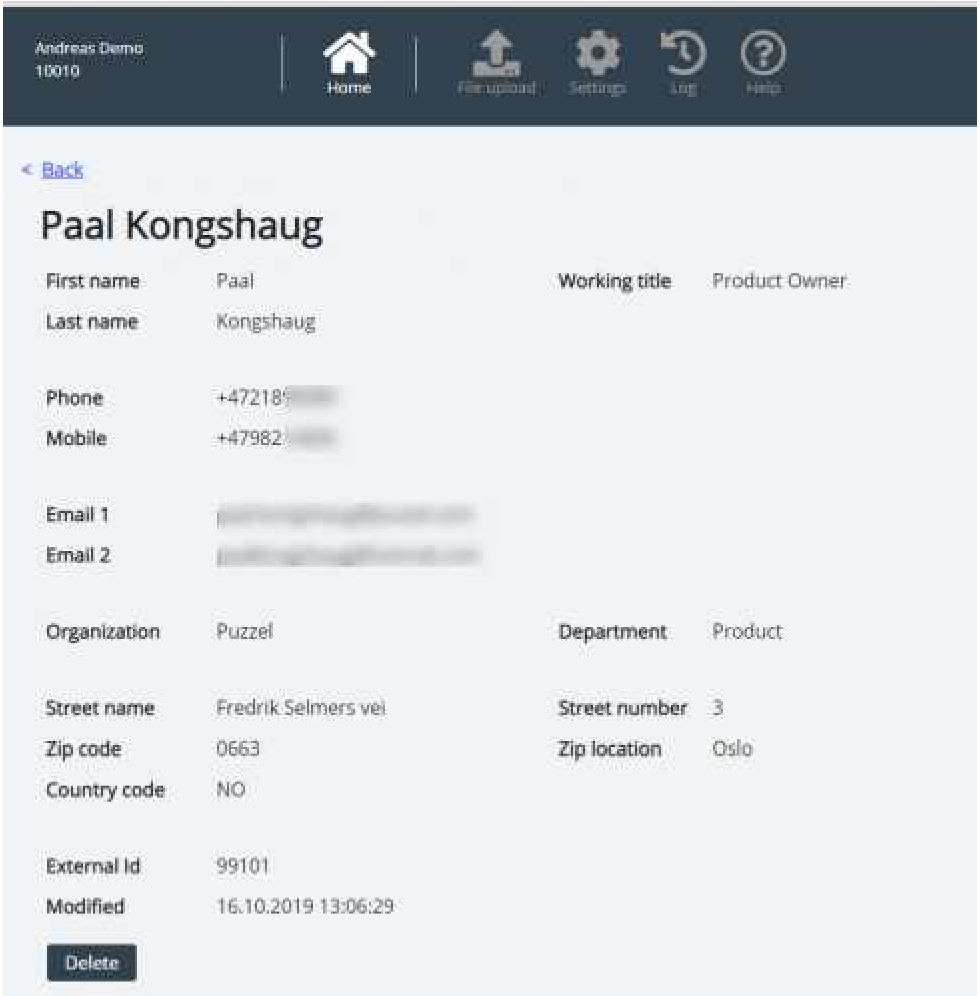
The contact file(s) can be uploaded in the Agent Assist Contact management system, or you can schedule a contact file export task from your CRM system so that Puzzel can fetch a contact file from Puzzels FTP server e.g. each night/week.

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 contacts name to see this contacts details:



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 contacts 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.

Note

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 contacts unique id in the (main) CRM system.	007
First name		James
Last name	**Required**	Bond
Phone [1]	+<country code><subscrier number>	+44123456789
Phone description [2]		
Mobile [1]	+<country code><subscriber number>	+44987654321
Mobile description [2]		
Email 1 [1]	*@*.*	James.bond@mi5.com
Email 1 description [2]		
Email 2 [1]	*@*.*	

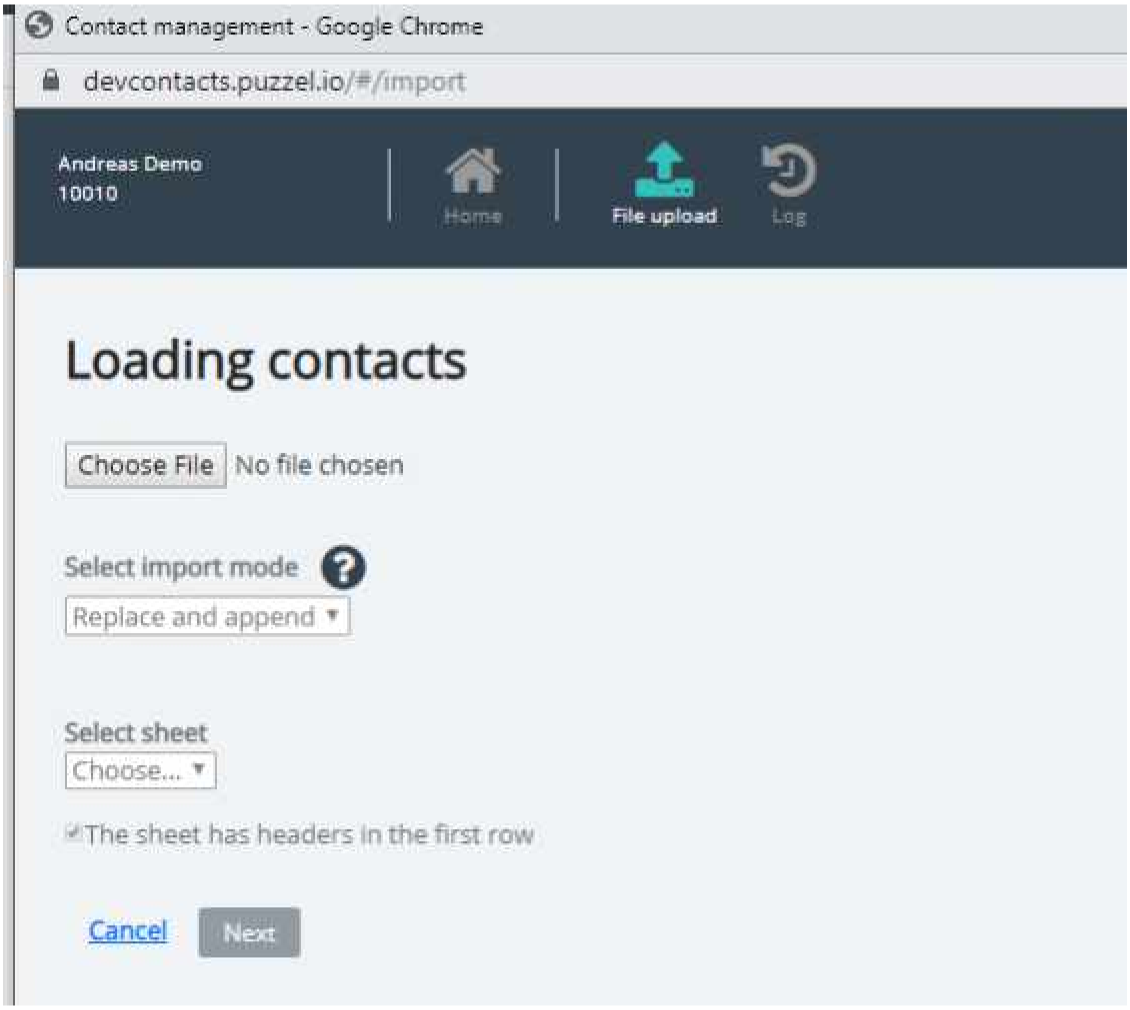
Column name	Comment/Format	Example
Email 2 description 2		
Working title		Secret agent
Organization		Mi5
Department		Foreign affairs
Street name		Oxford street
Street number		33
Zip code		12345
Zip location		London
Country		England

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

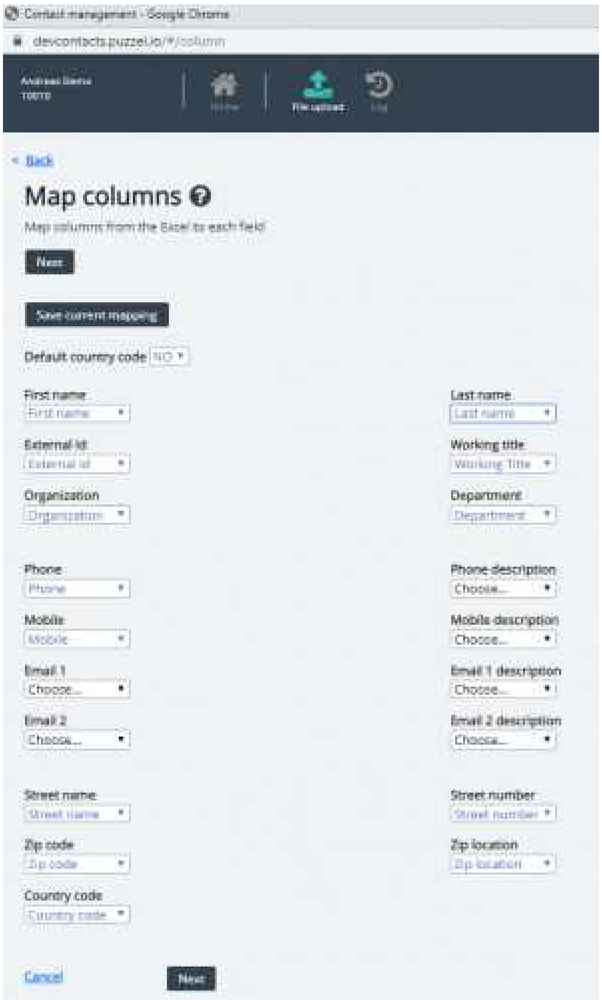
File upload

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 files 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.

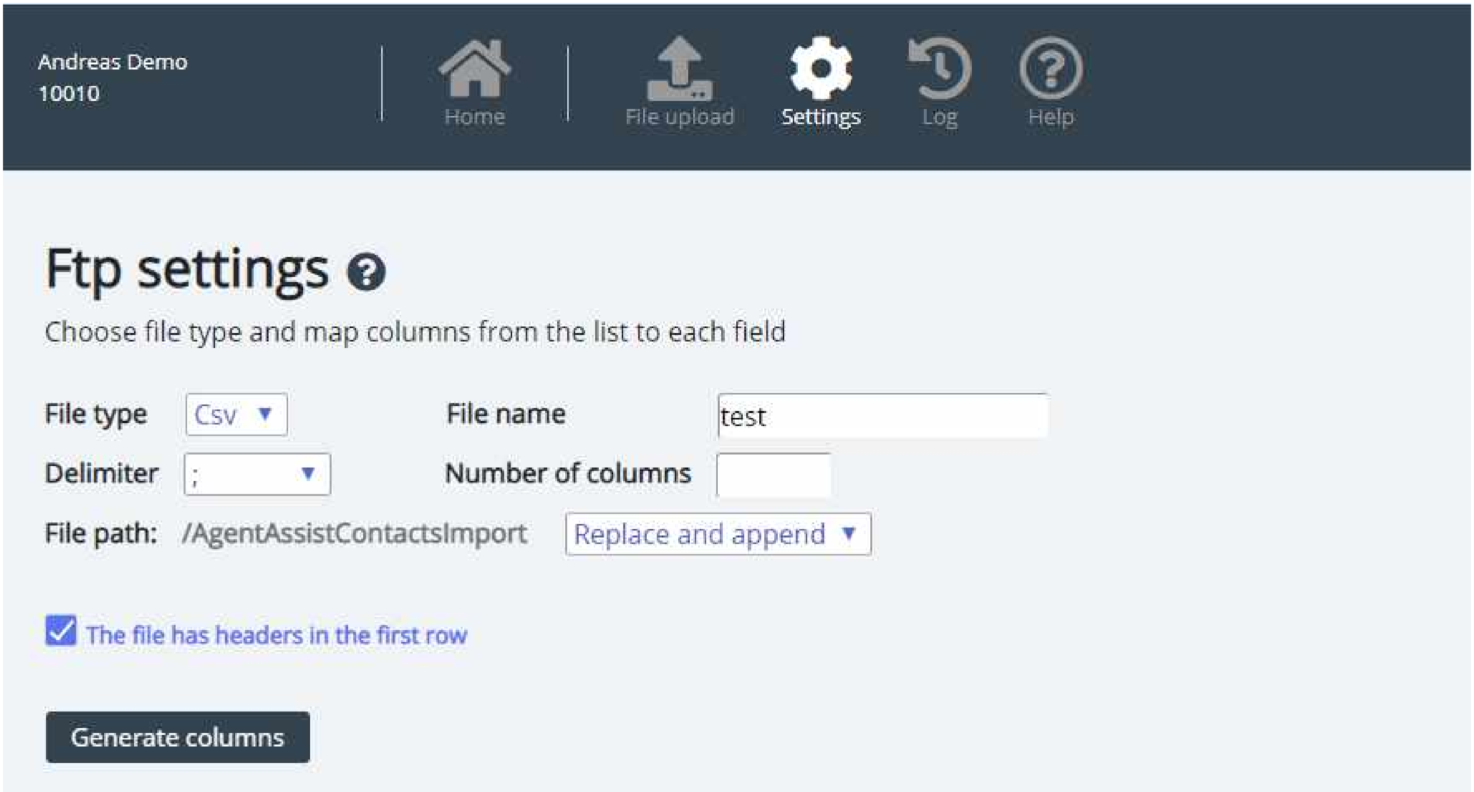
If the mapping looks correct, then click ***Start import***. If not, click < Back to adjust the mapping or Cancel.

When the import is done, you can see a new entry in the *Import log*.

FTP import/export

FTP import

If Settings for FTP is configured correctly, Puzzel will look for a new file on Puzzels FTP server periodically (every 15 mins), and if a file is found, then its imported and moved to a sub-folder /AgentAssistContactsImport/Archive



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

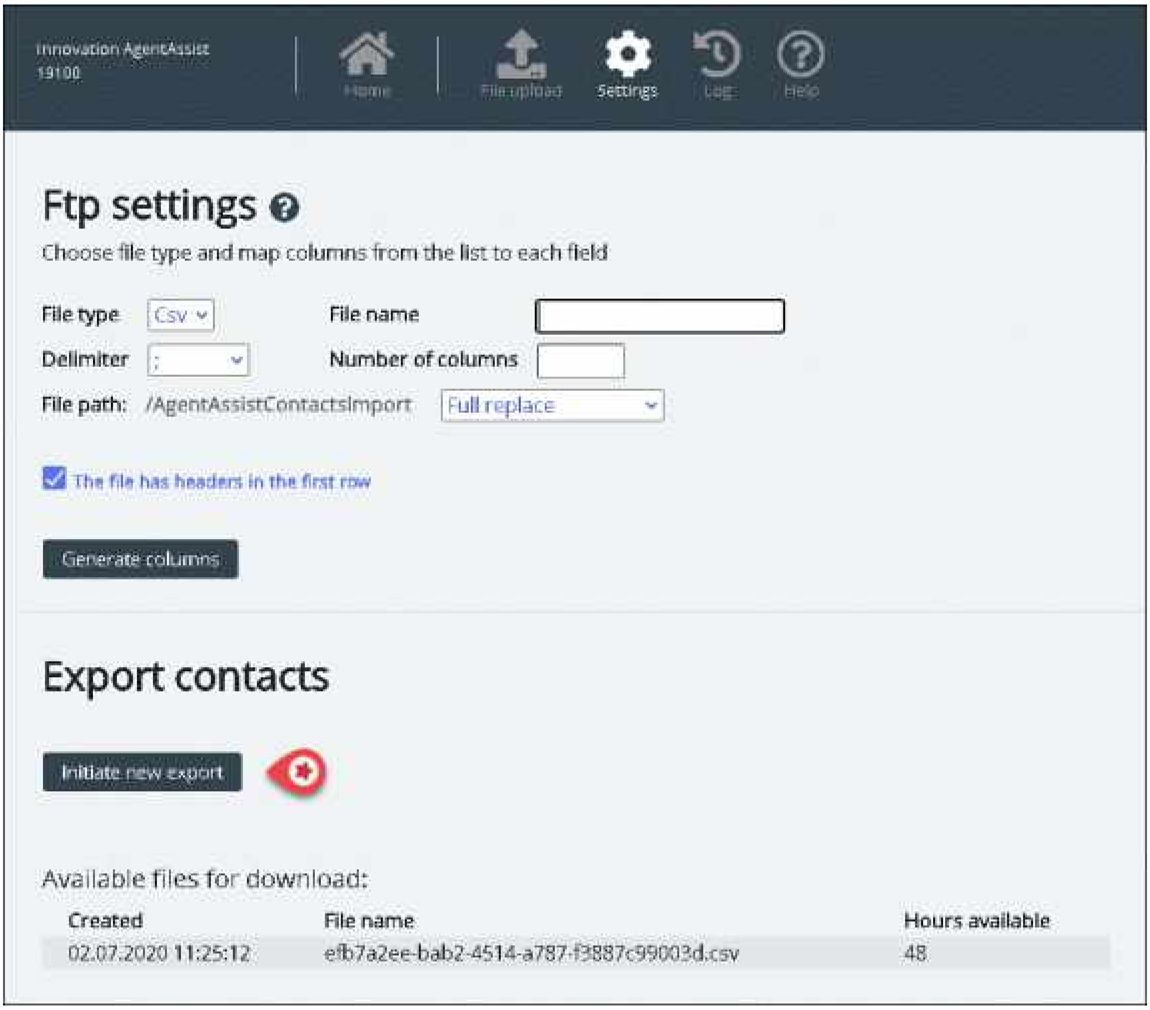
To map the columns of the contacts list file to the database fields, click the buton Generate columns so that the mapping fields appear.

- 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.

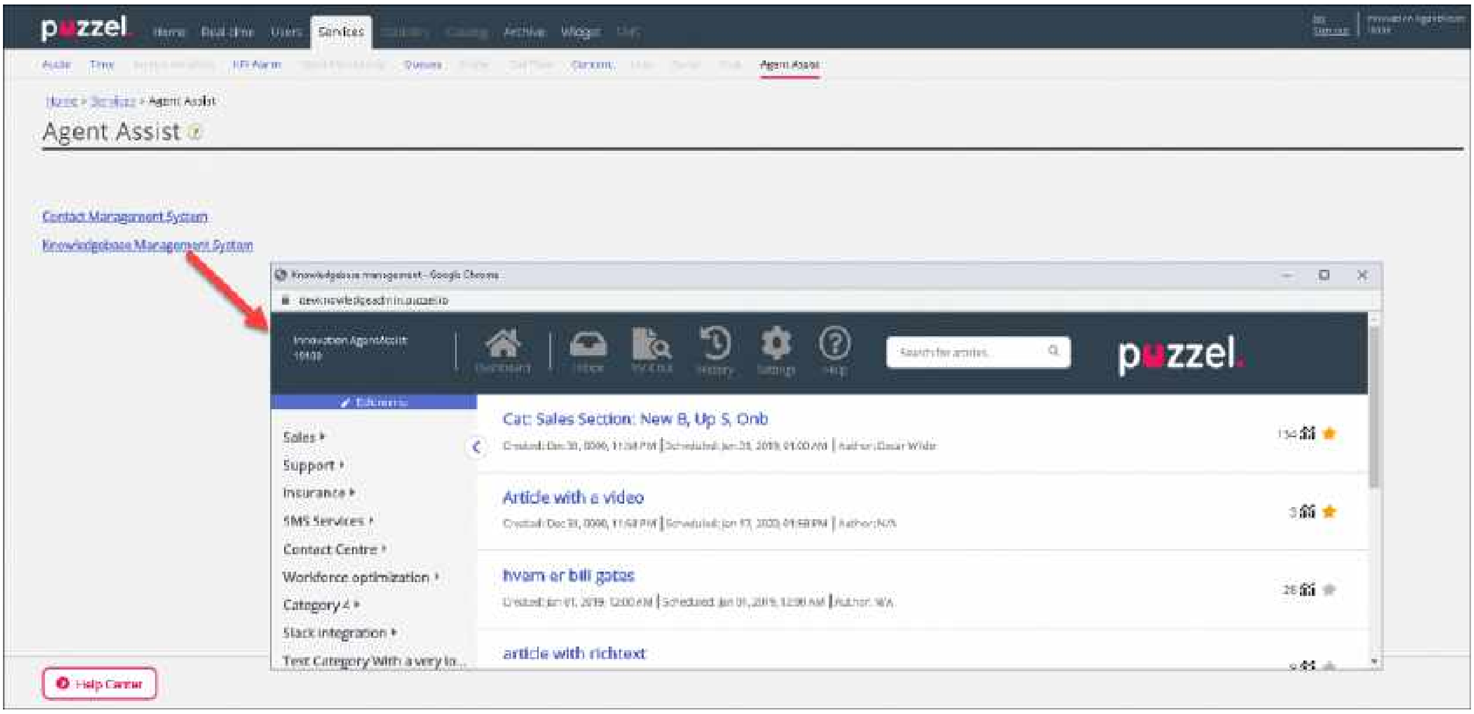
FTP export

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.


Innovation AgentAssist
19100
Home
File upload
Settings
Log
Help
Ftp settings
Choose file type and map columns from the list to each field
File type
Csv
File name
Delimiter
;
Number of columns
File path: /AgentAssistContactsImport
Full replace
The file has headers in the first row
Generate columns
Export contacts
Initiate new export
Available files for download:
Created
File name
Hours available
02.07.2020 11:25:12
efb7a2ee-bab2-4514-a787-f3887c99003d.csv
48

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

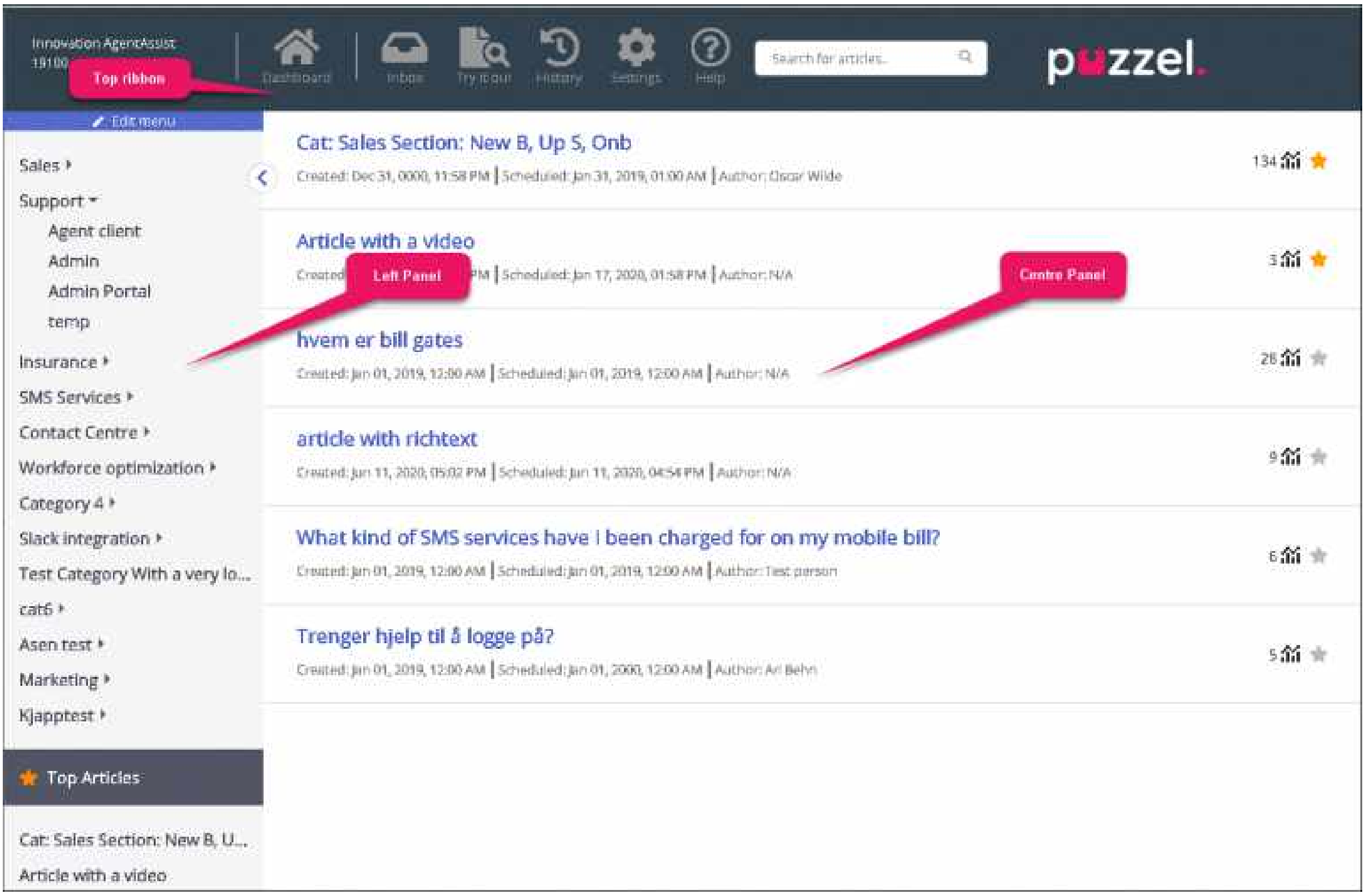
- Rate the articles

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.

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:

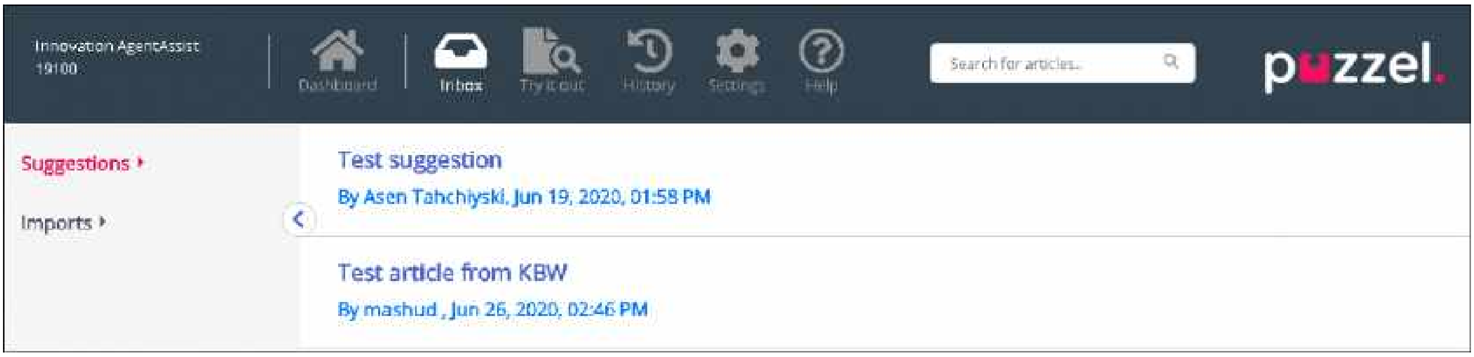
1. **Dashboard**: Screen that is displayed as soon as you have logged in
2. **Inbox**: Contains Knowledgebase article suggestions from agents for Admin’s approval.
3. **Try it out**: A space to try out search results of articles based on the search query.
4. **History**: Displays the audit log of various 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.

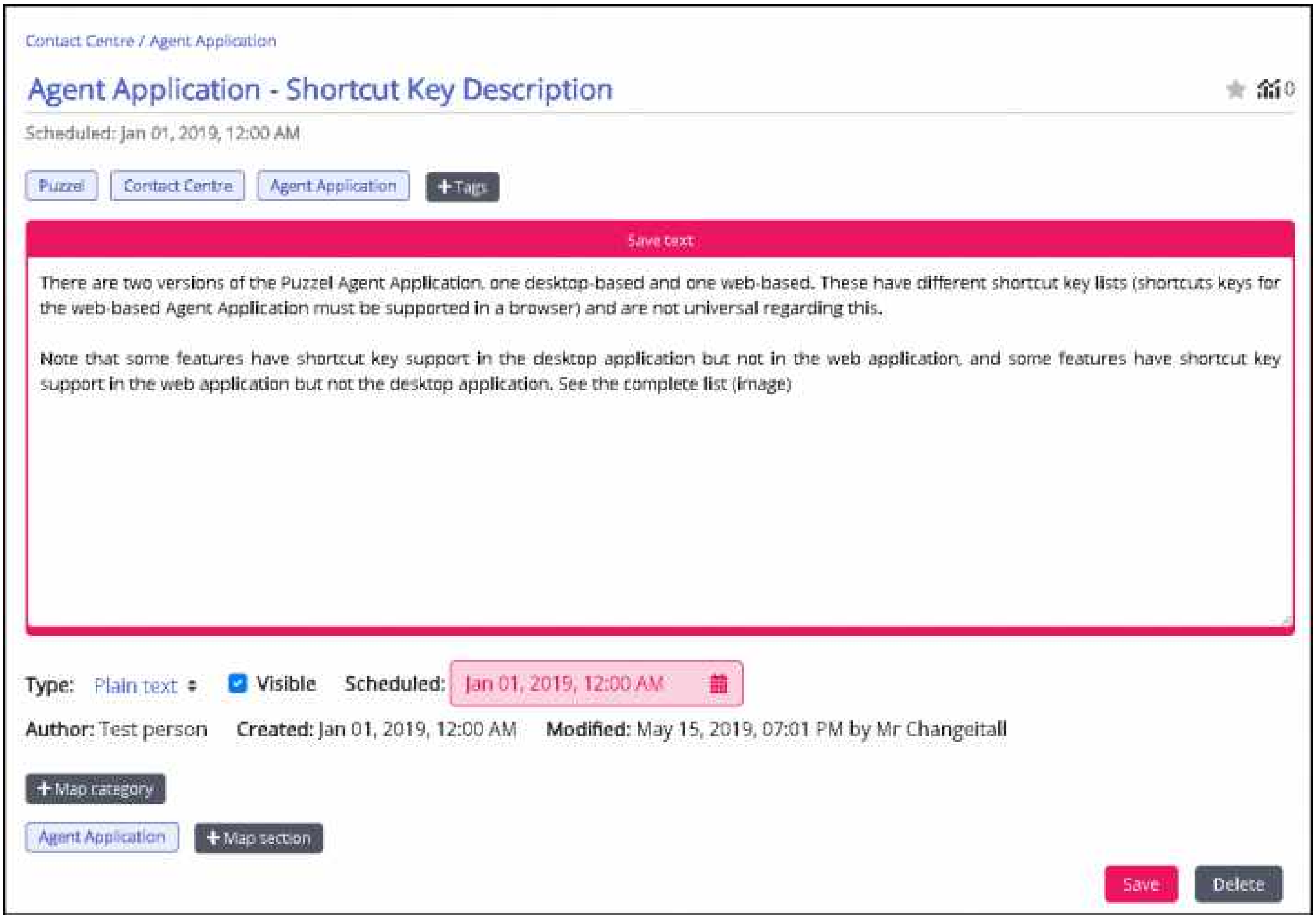
Inbox

The Knowledgebase article suggestions from the agents will be sent to admin for approval and are listed under Inbox as shown below.

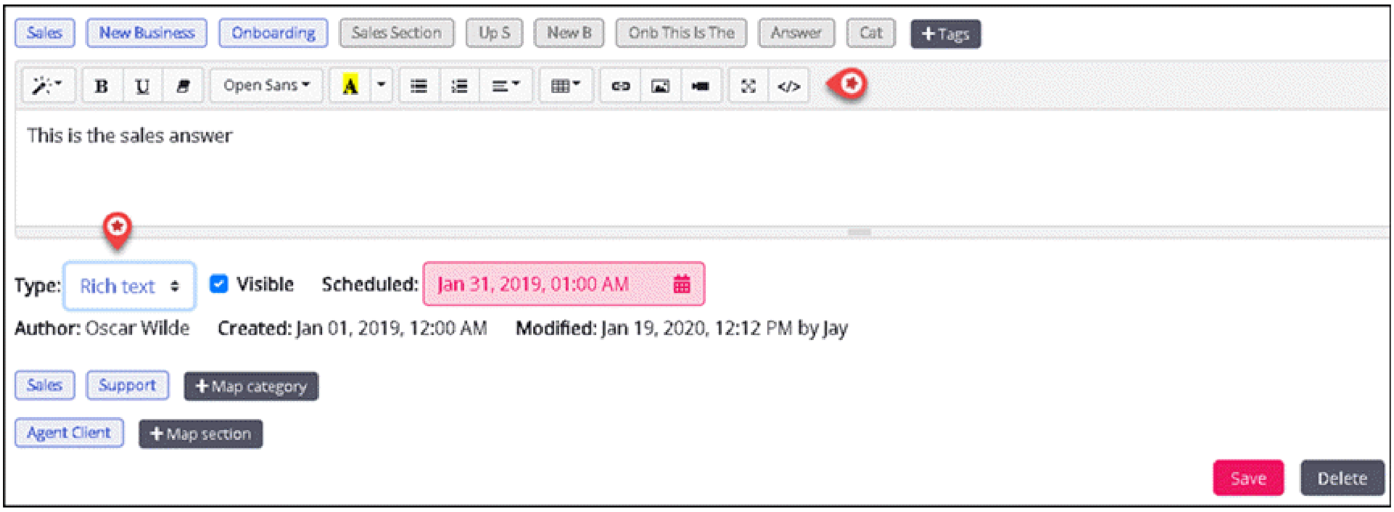


To view and approve the article:

1. Click on the article you wish to approve. This opens the article in the editor.



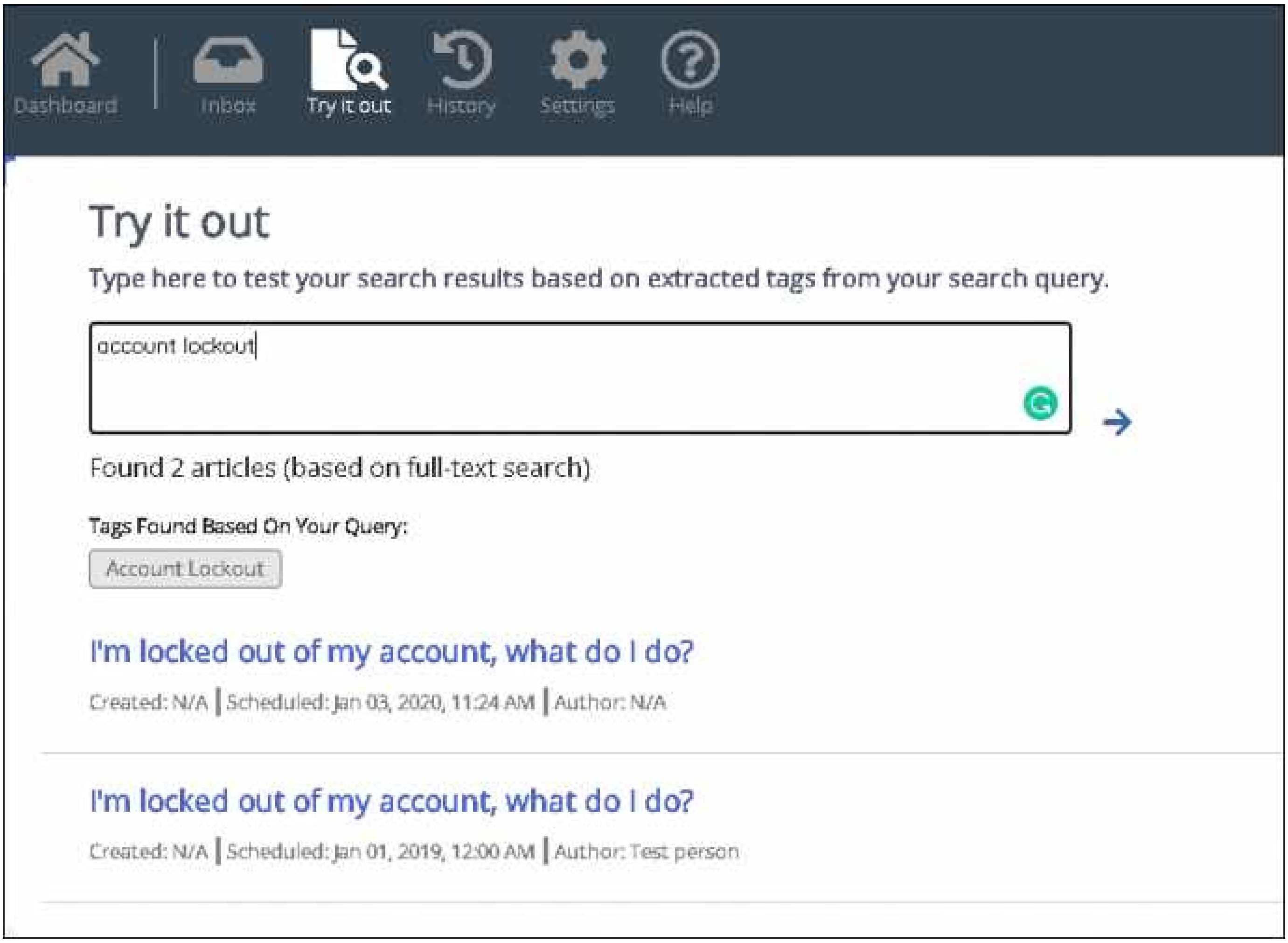
2. By default, plain text editor will be selected. Click on the drop-down menu of the **Type** attribute and select **Rich Text.** You will now be able to see the tool bar at the top. This will allow you to embed images directly from the clipboard without having to save and insert them into the article. 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.

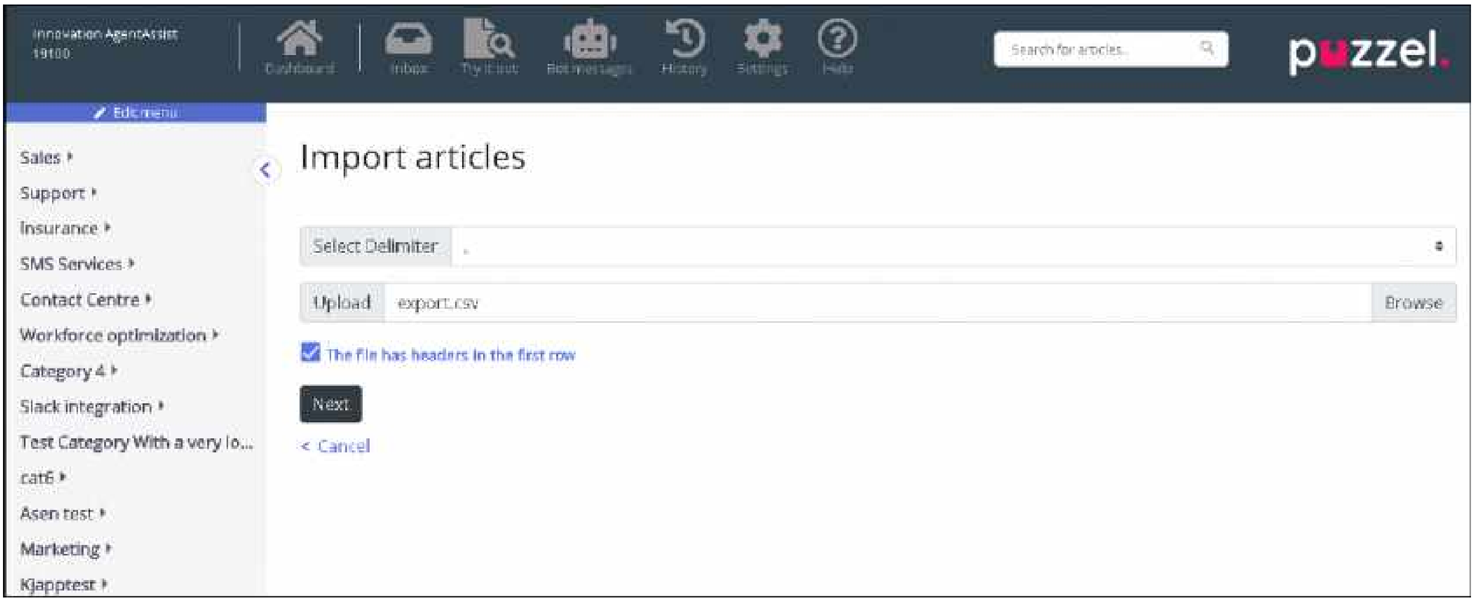
Try it out

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.

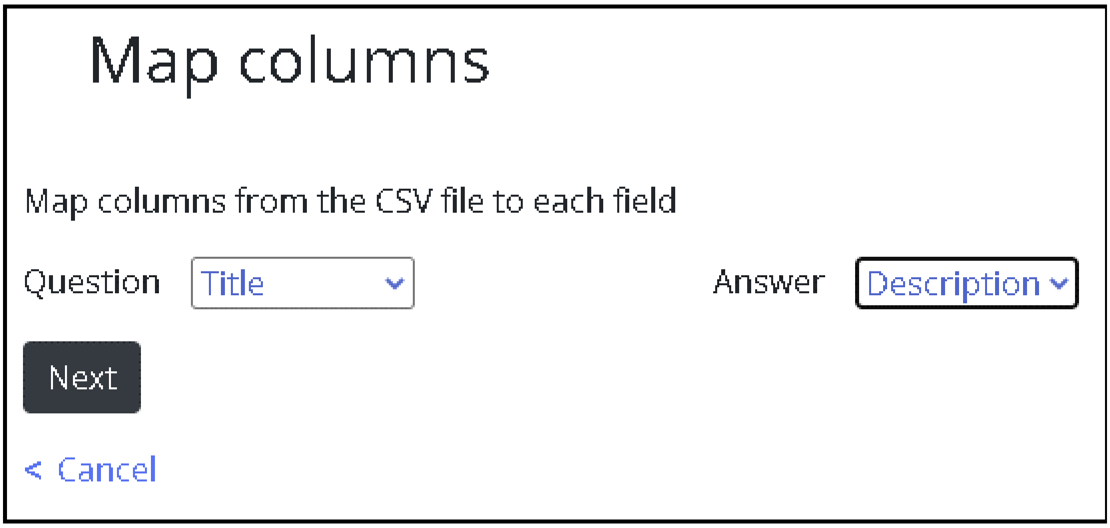


Settings

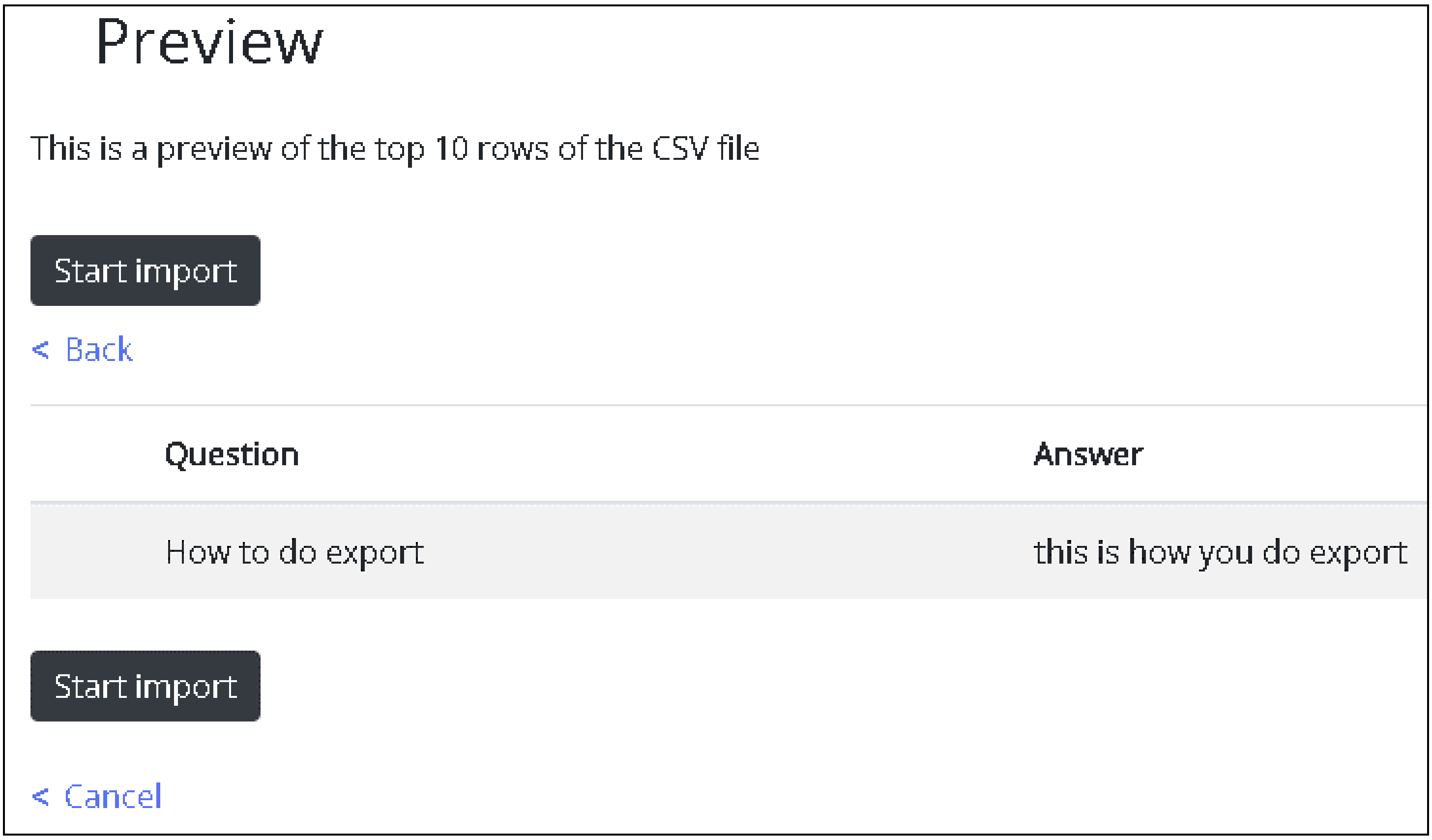
You can do bulk import of articles from a CSV file under the **Settings** tab. A CSV file will essentially have two columns for question and an answer. Click on **Import articles from CSV** to take you to the **Import articles** screen.



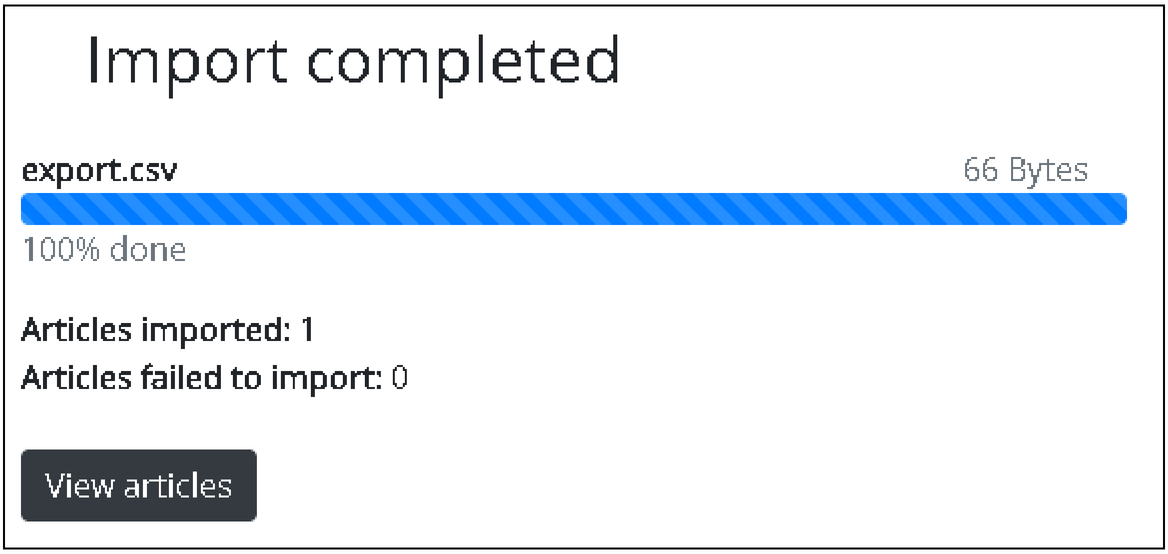
Upload the CSV file and click **Next** to go to the **Map columns** screen. Map the headings in your CSV file to the Question and Answer fields and click **Next** .



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.



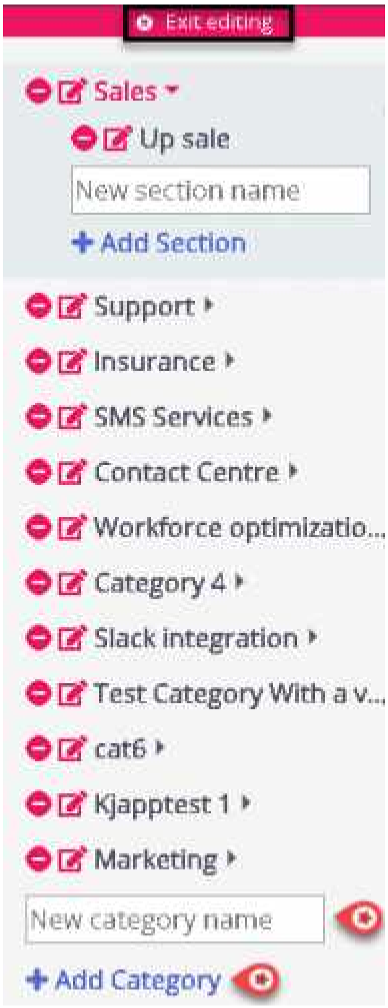
Category and section

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:

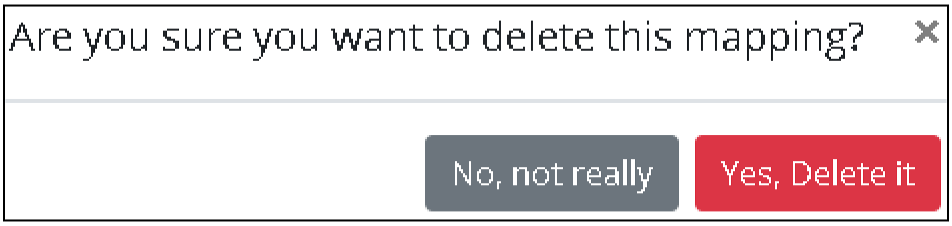
1. Click on the edit icon (shown below) to the left of the category name.

2. Enter a new category name.

3. Click on **Rename** to save the changes

To delete a category, click the icon (shown below) 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

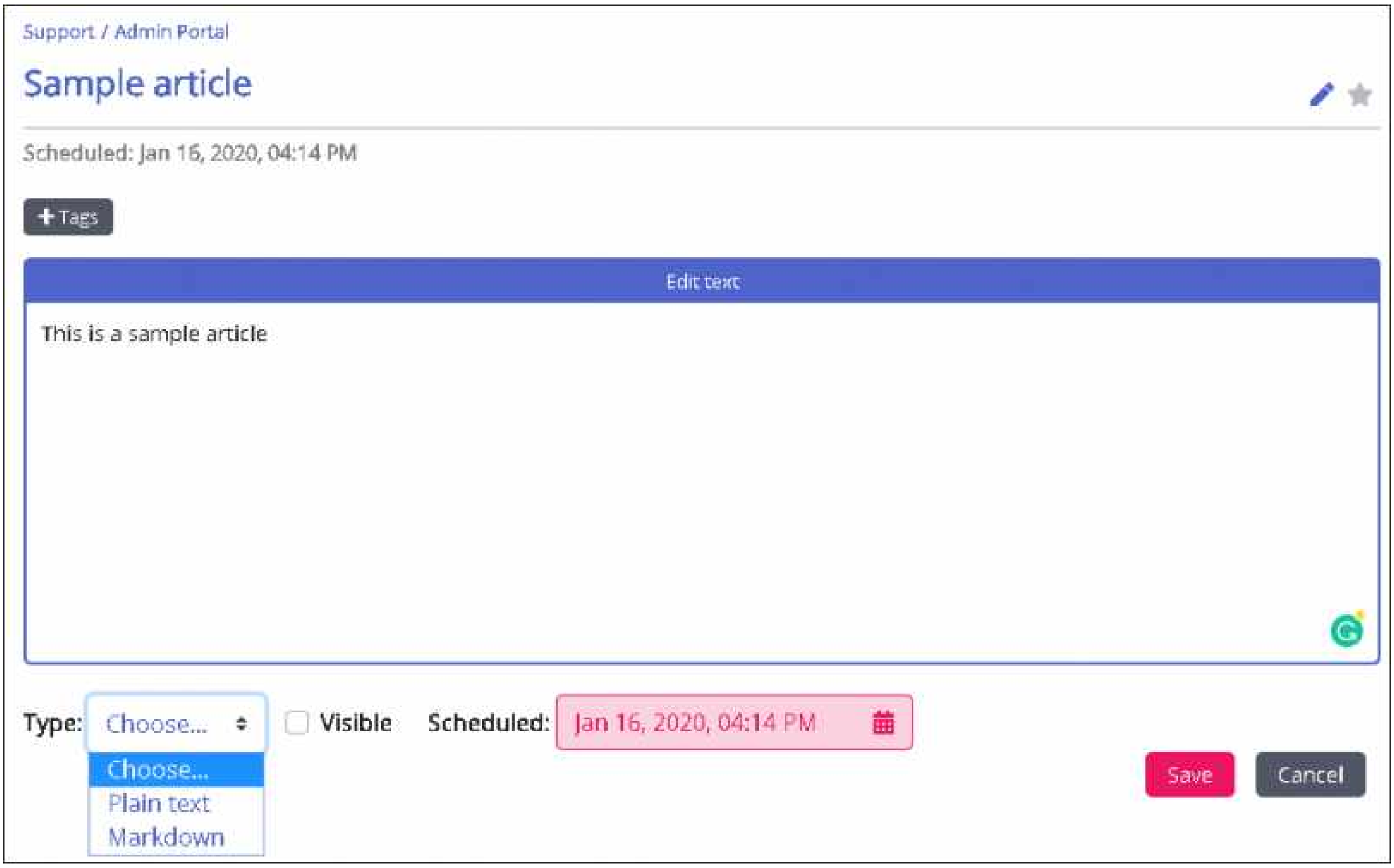
Creating and editing an article

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 icon (shown below) in the center panel to open the editor.



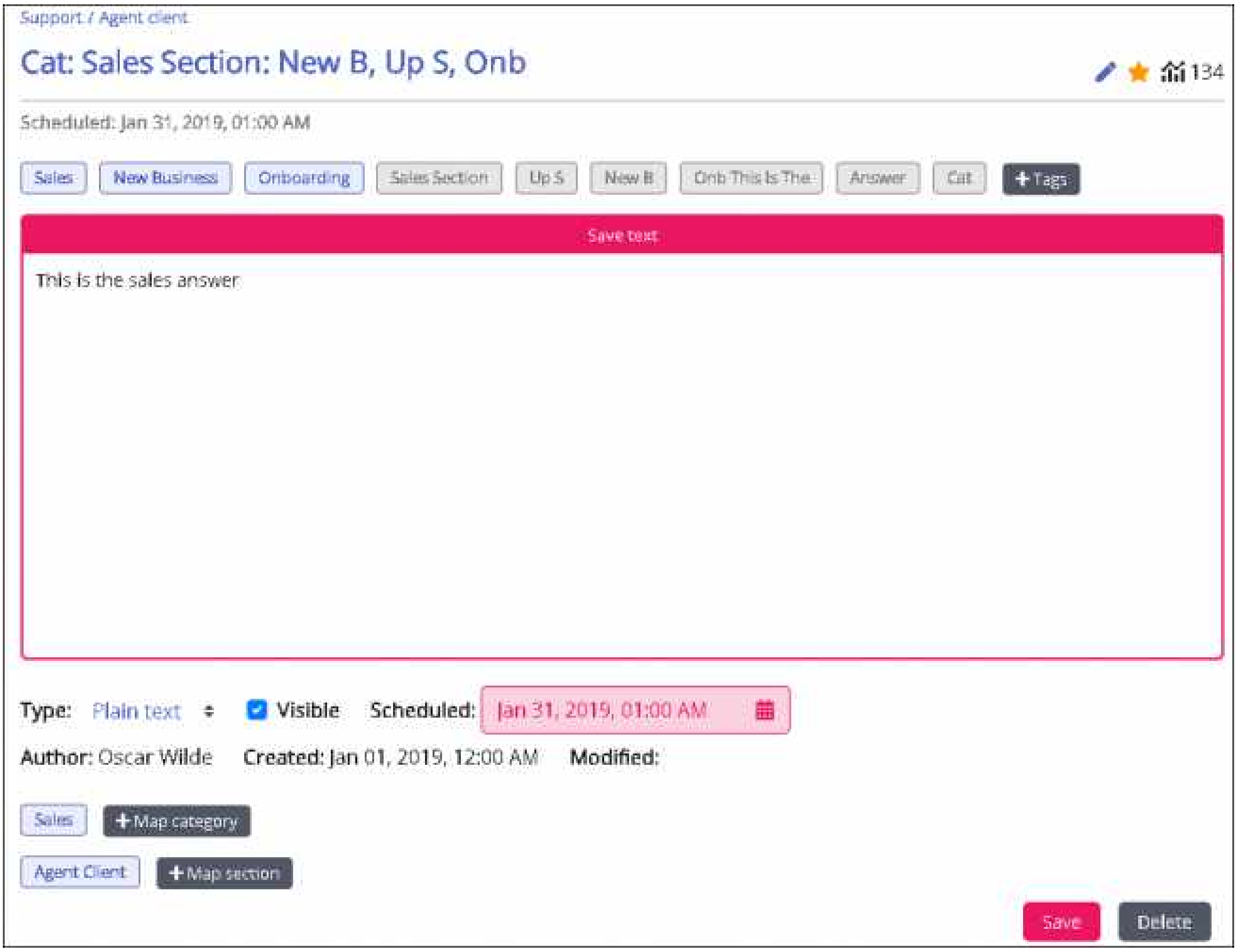
3. Enter the title of the article. For example; Sample article

4. Enter the content of the article
5. Click on the icon (shown below) 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 button (shown below) 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 and 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 right corner.

Top article

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.

Sort and filter articles

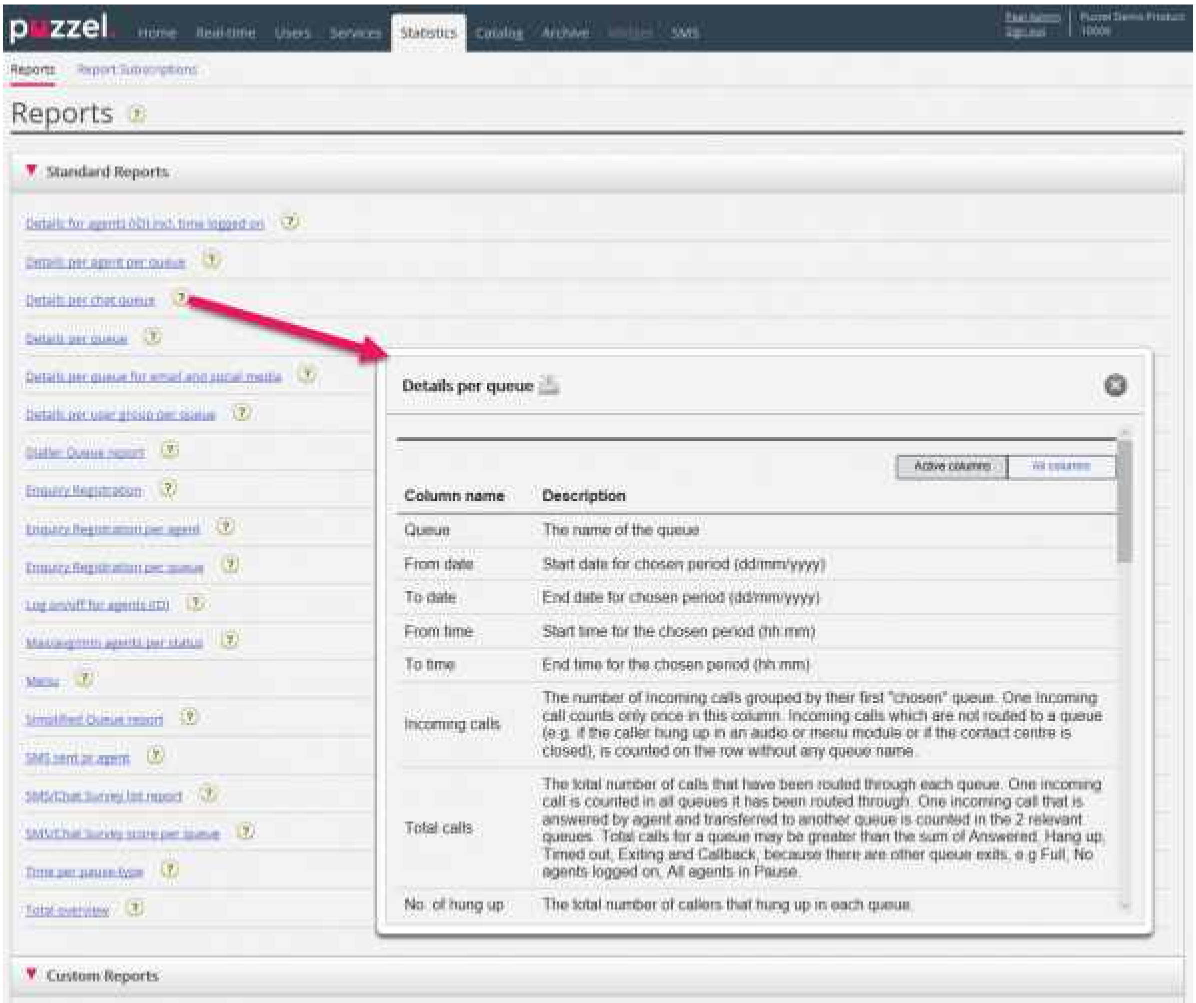
You can alphabetically sort the articles for the selected category by clicking on the Sort articles button on the top of the screen. Also available is the filter functionality which allows you to filter the articles based on title of the article, creation date, and author.

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.

Standard reports

Here you will find all the standard reports your company has access to.

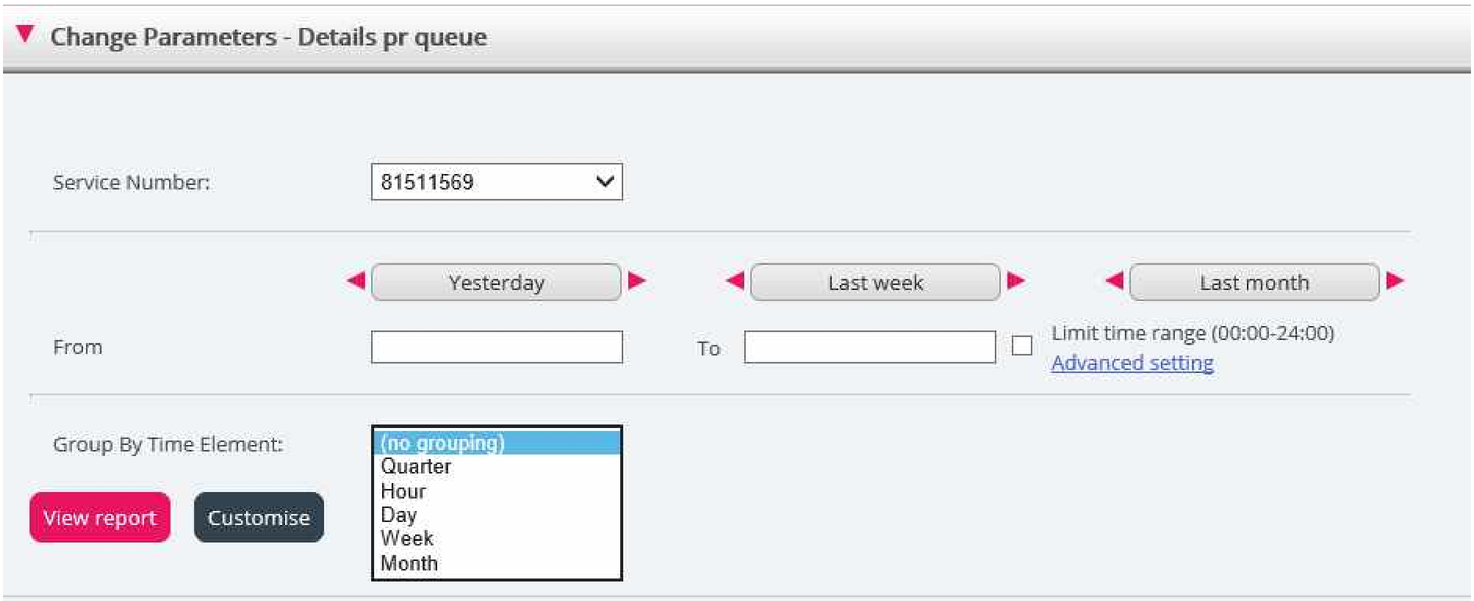


The question mark next to each report contains a complete report description.

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/product-documents/feature-guide/statistics

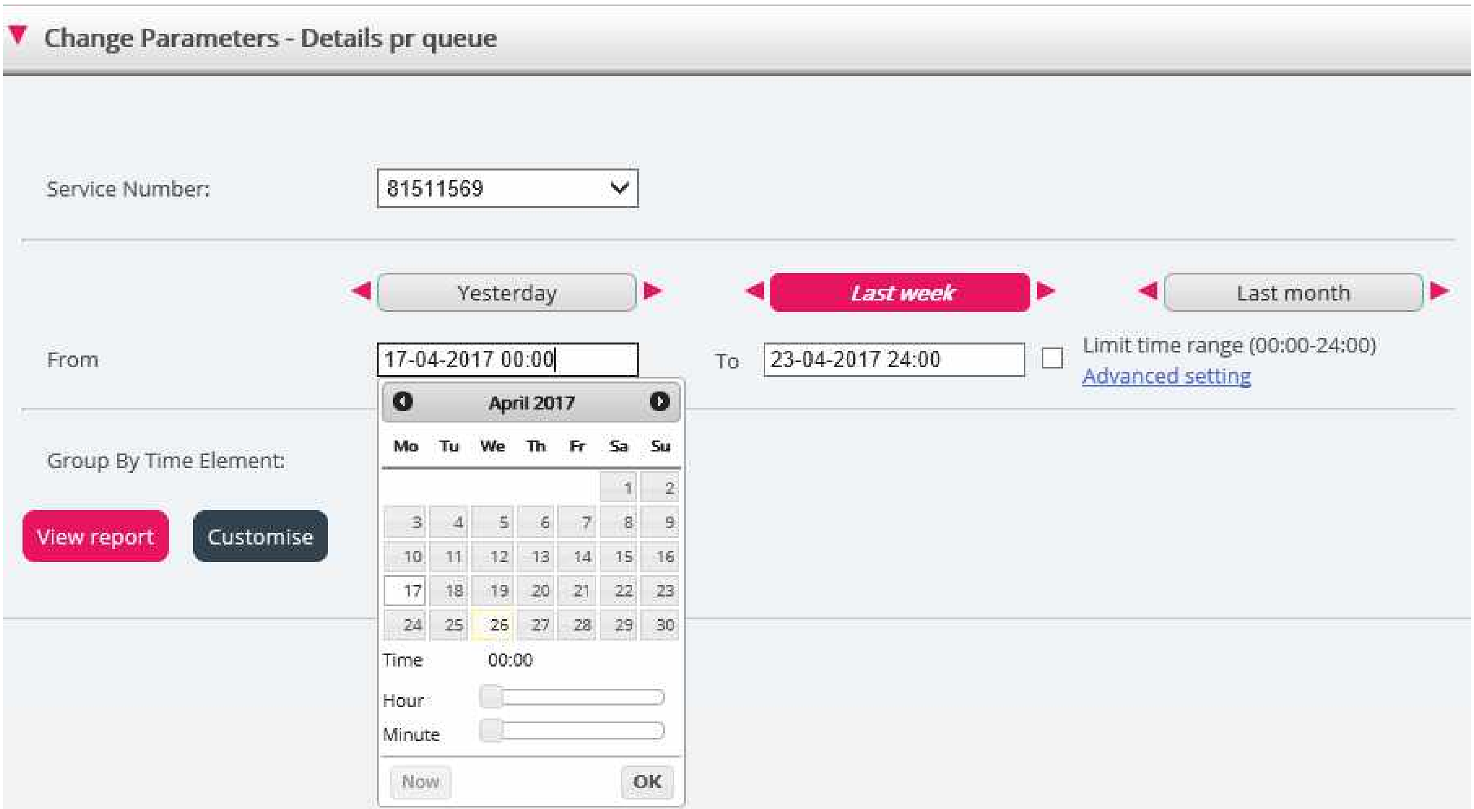
In statistics, calls and written requests are shown in the relevant system queue (not in Display queue).

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.



Defining Time Period

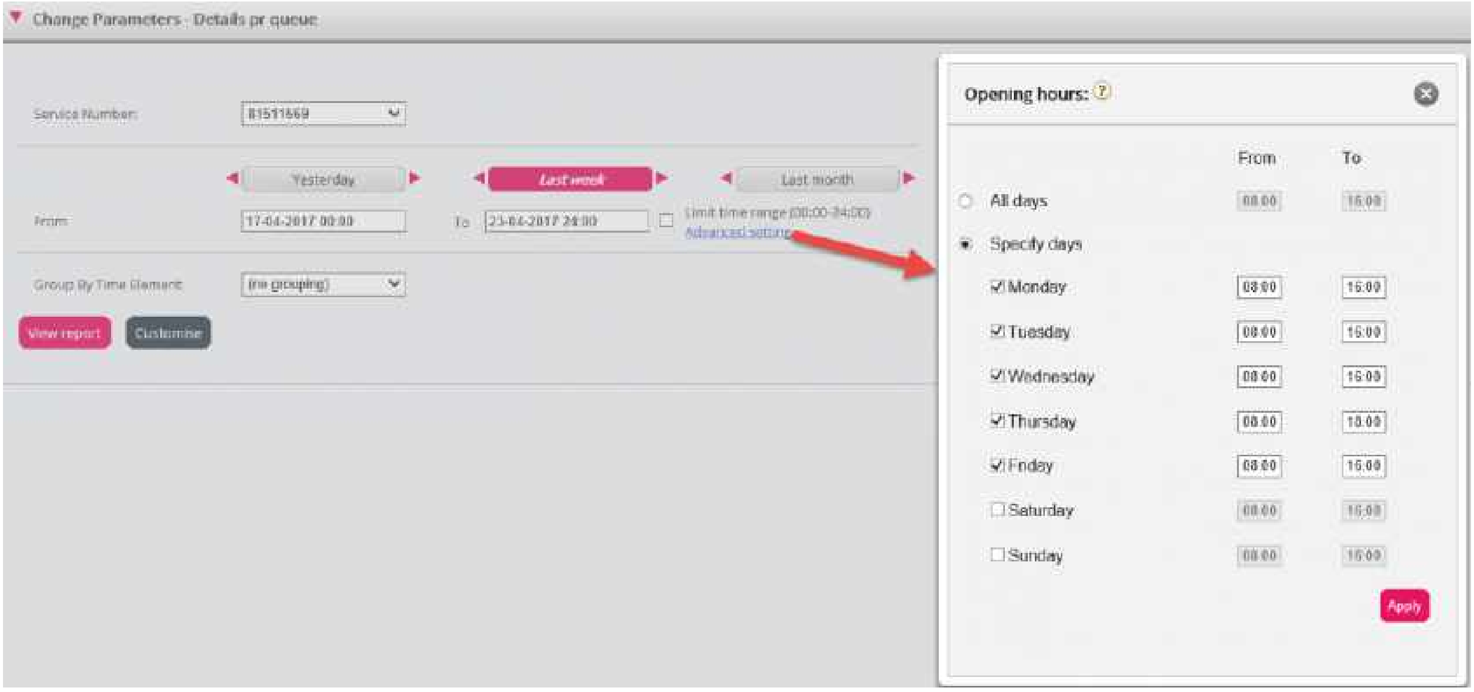
Defining a time period for a report can be done manually or by using the Time helper-buttons. The Time helper-buttons help you to select a time range quickly. There are buttons available for Day, Week and Month. You can browse through time periods by using the arrows next to the Timerange buttons and move between dates, weeks and months.



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.

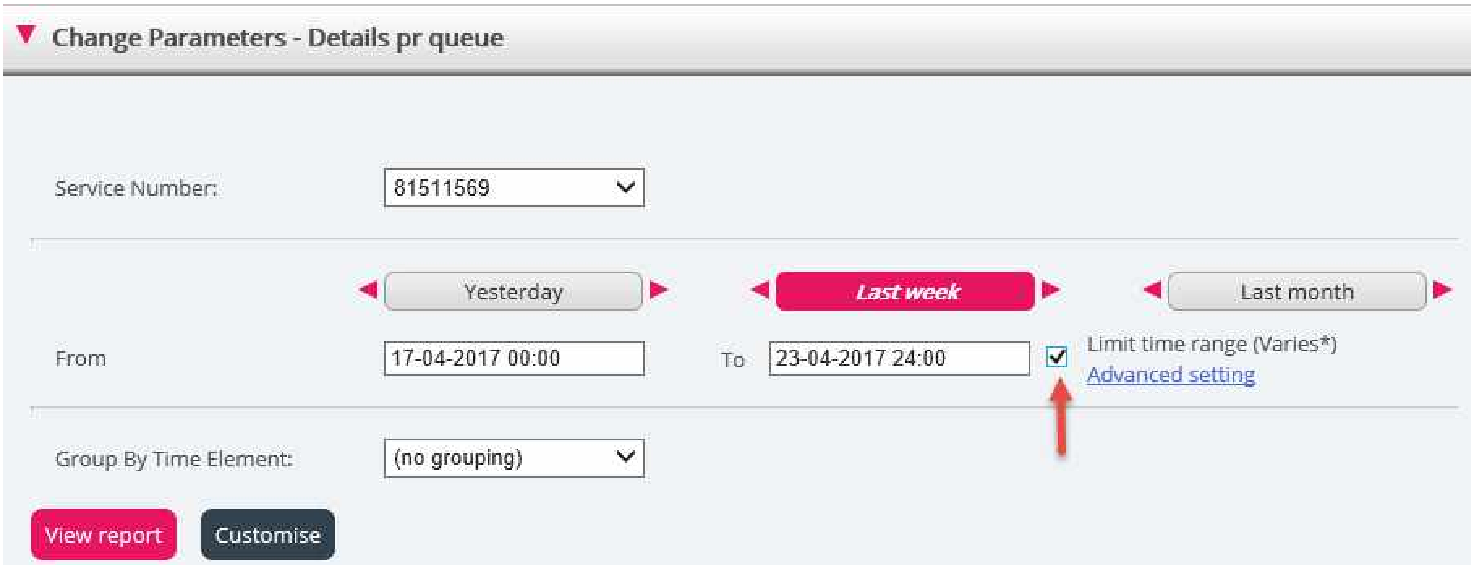
Statistics reports are as default stored for 1200 days unless another storage time is agreed. If you want to store agent reports (reports with numbers per agent) shorter than statistics on overview/queue level, contact Puzzel support so that we can configure shorter storage time for agent statistics (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.



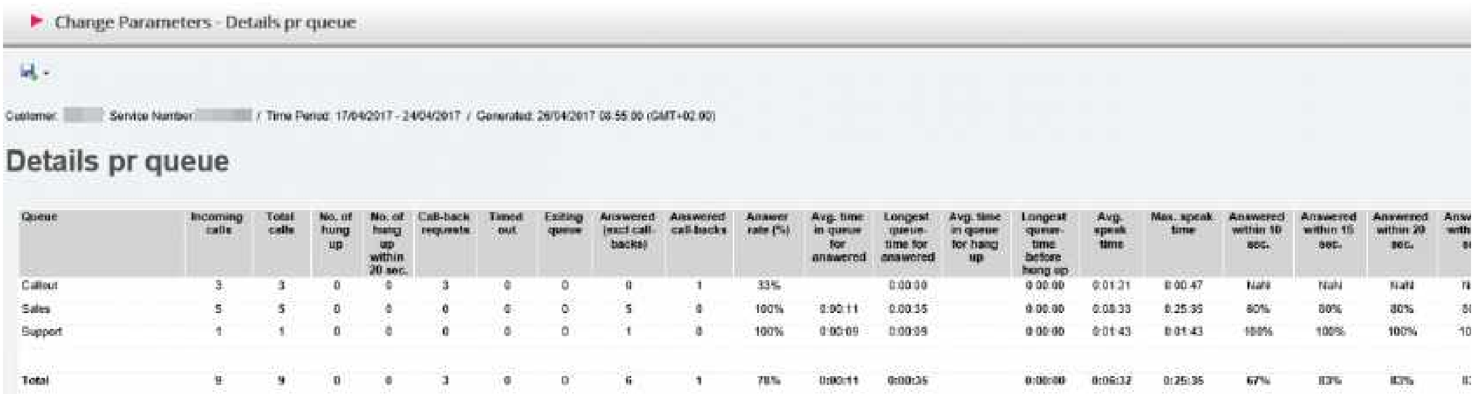
To do this, click on the Advanced settings link to open the Opening hours window, where you can configure the time range for each day.

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 hang 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.	Answ with s
Callout	3	3	0	0	3	0	0	0	1	33%		0:00:00		0:00:00	0:01:21	0:00:47	NaN	NaN	NaN	N
Sales	5	5	0	0	0	0	0	5	0	100%	0:00:11	0:00:35		0:00:00	0:08:33	0:25:35	60%	80%	80%	8
Support	1	1	0	0	0	0	0	1	0	100%	0:00:09	0:00:09		0:00:00	0:01:43	0:01:43	100%	100%	100%	10
Total	9	9	0	0	3	0	0	6	1	78%	0:00:11	0:00:35		0:00:00	0:06:32	0:25:35	67%	83%	83%	8

Save Report as File

When you have generated your report you can save it by clicking the save button.

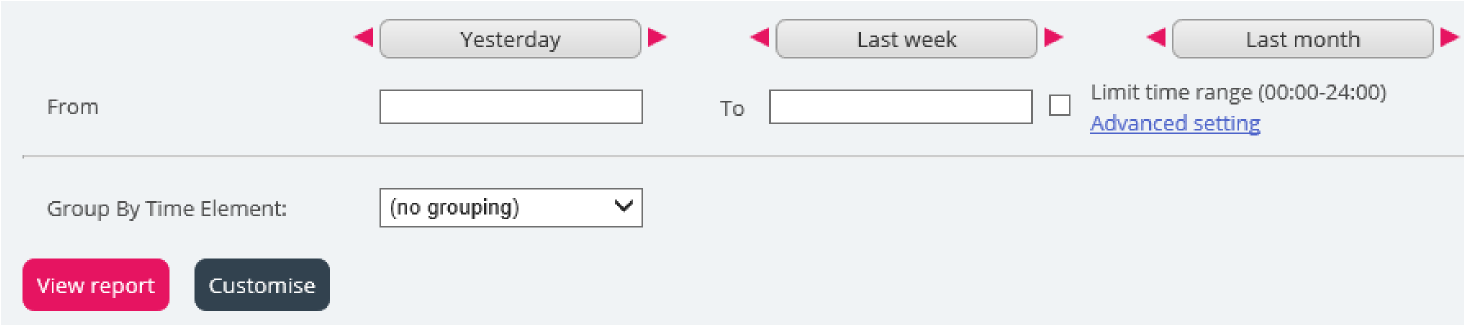
You can choose between from several formats, e.g. Excel, mhtml and pdf.

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.

Custom Reports

You can customise a standard report by clicking on the Customise button.



When you or someone in your company has customised a report and saved it, this new report will appear in The Custom reports tab for future use.

How to Customise a Report

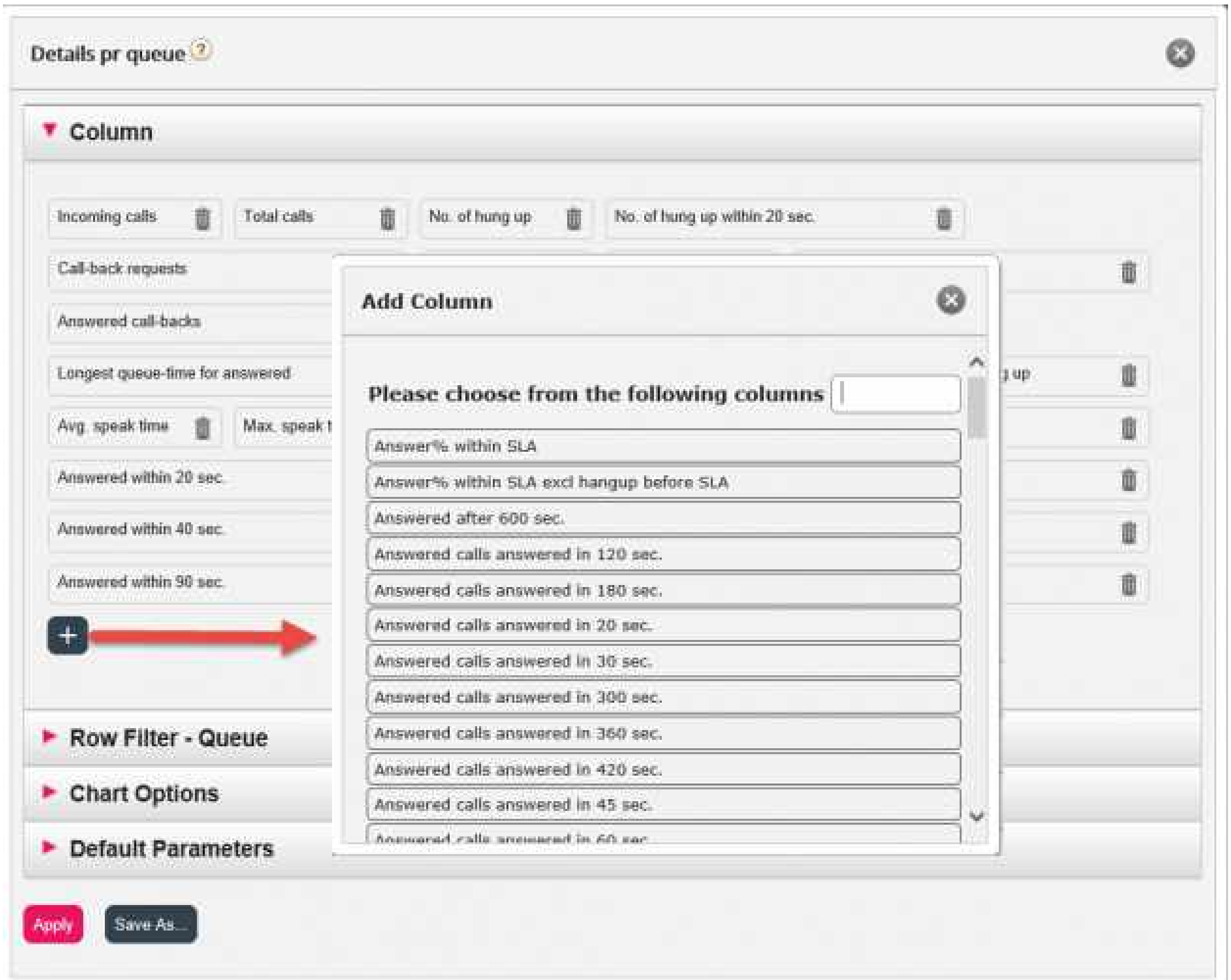
When you click the Customise button, the customise window will appear.

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 dont have access to (because of Resource Filter) you cannot delete these elements. You will see a padlock symbol next to the element.

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.

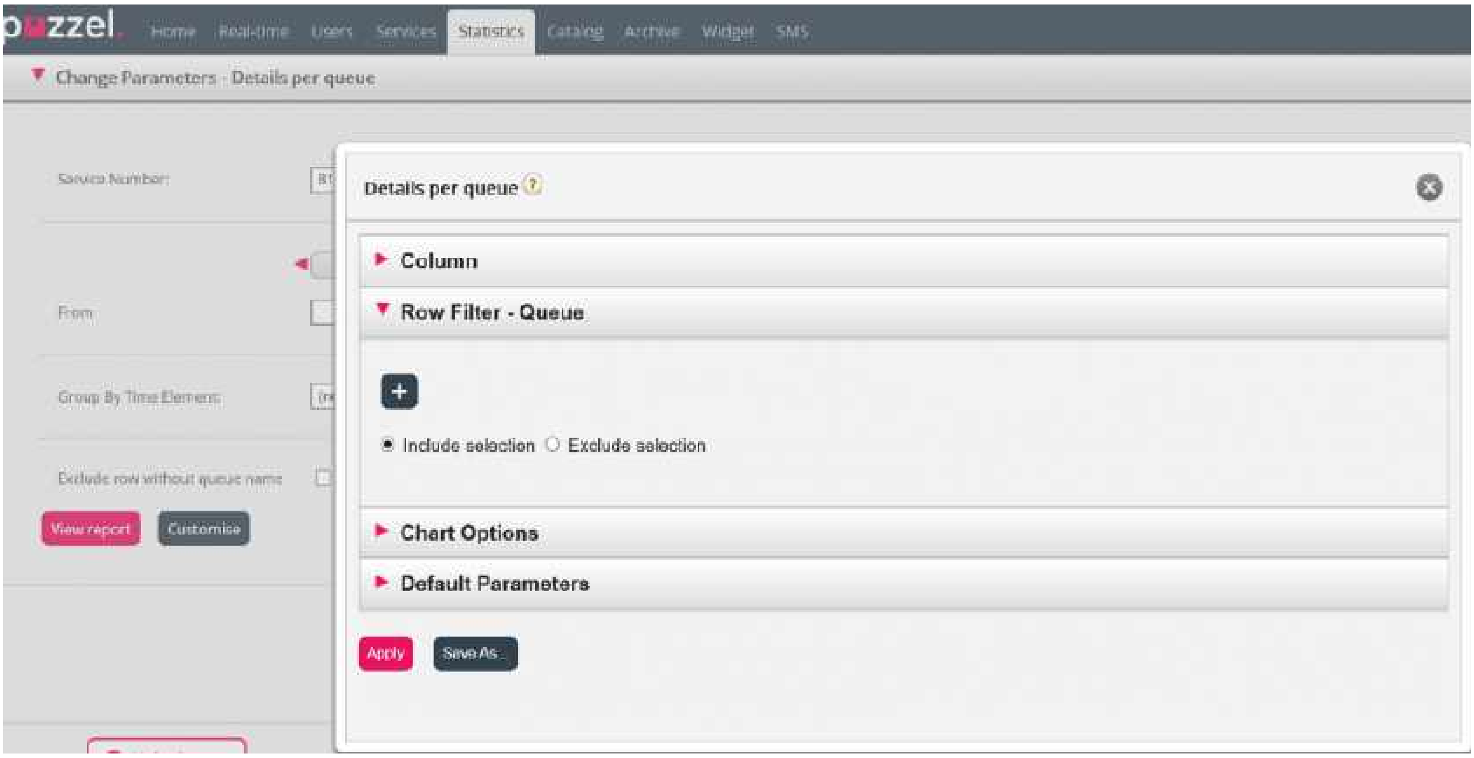


The columns for this report that have not yet been chosen are listed. To add a column to the report, click on the column name. Then close the window and click Apply and View report, or continue to customise Rows and/or set Default parameters.

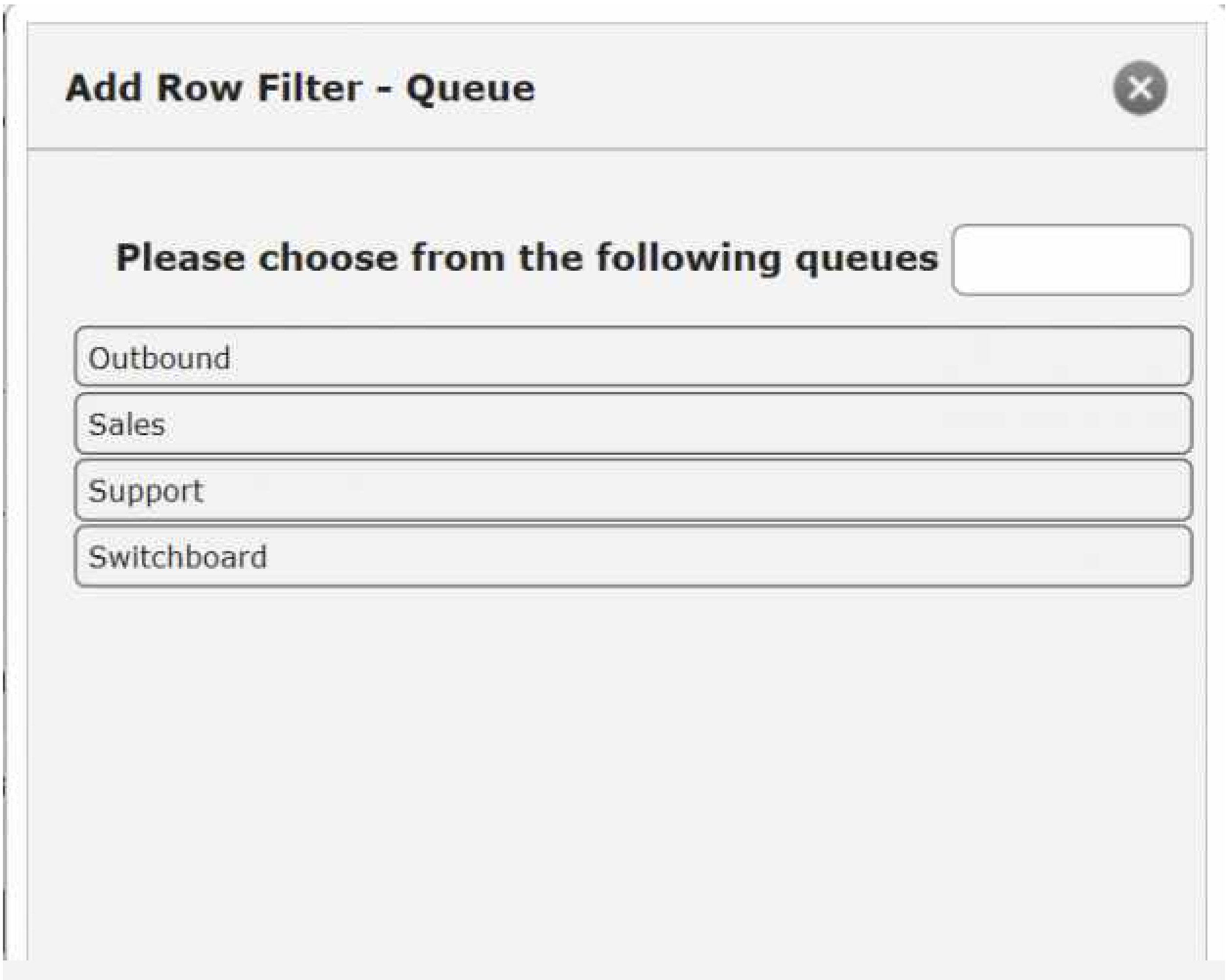
Customising Row Filters

As a default, all rows (e.g. agents, user groups, queues) are shown in a report.

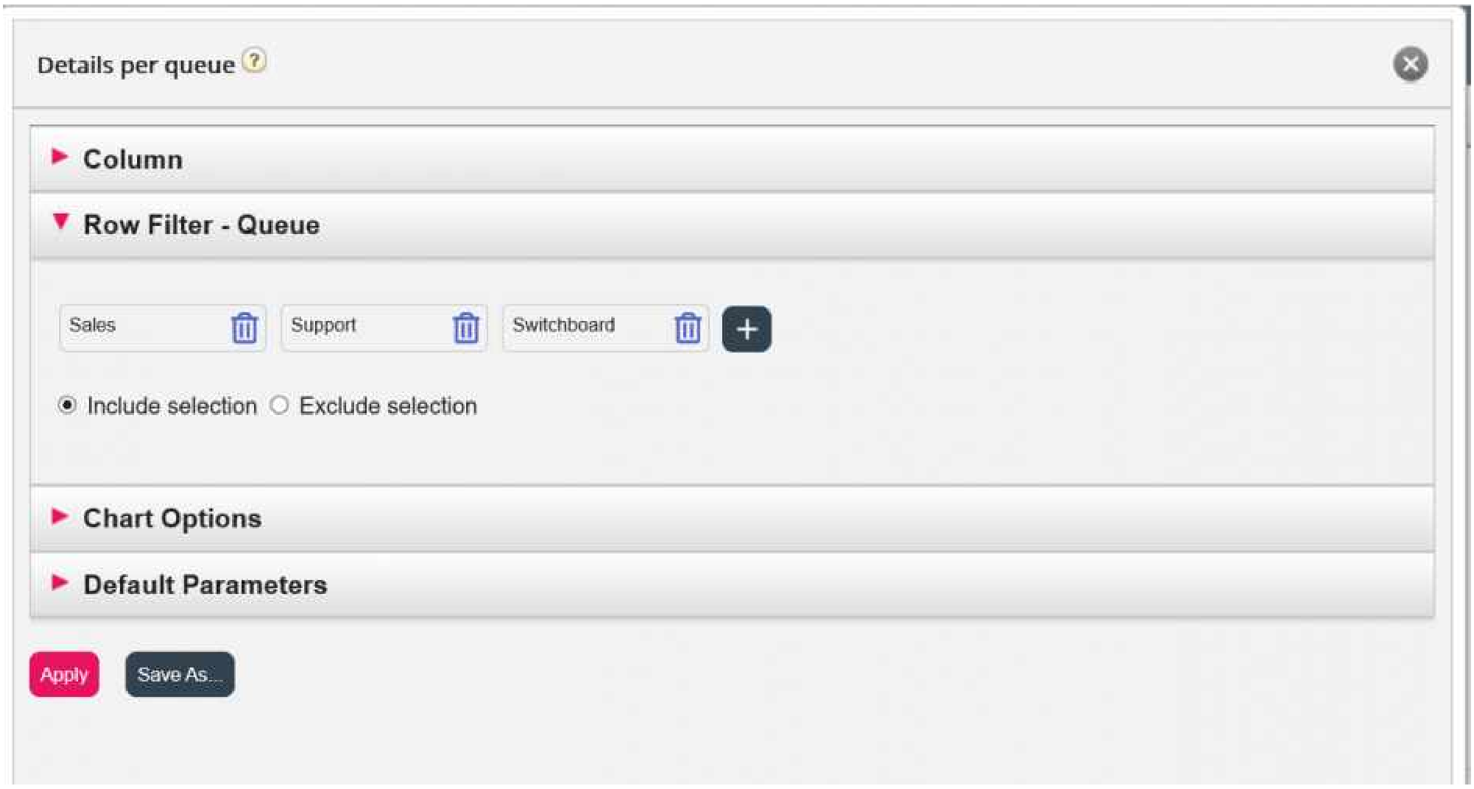
You can add a row filter with one or more entries if you want to show only the selected ones or exclude the selected ones.



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.

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, Column, or Line chart)
- if all (default) or just the top 5/10/15/20 rows should be shown

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.

Customising Default Parameters

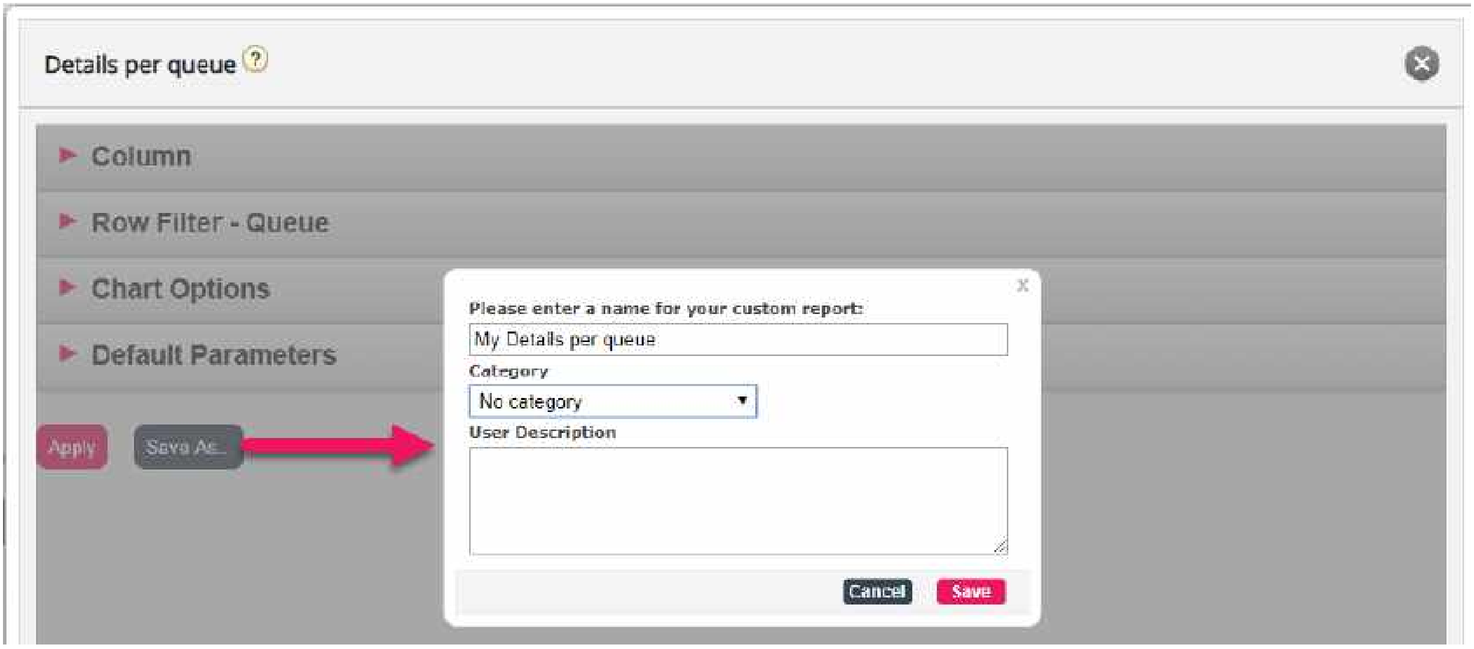
Default parameters allow you to define certain elements so you dont have to define them every time you want to see the report. The default parameters you can define for your reports are:

- *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.

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 refer to the section here

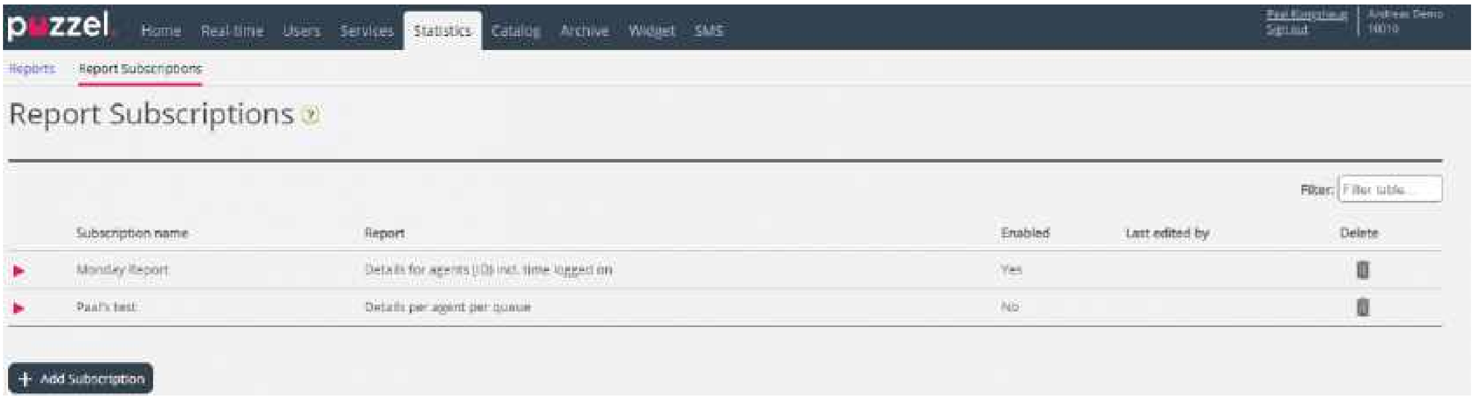
Report Subscriptions

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.



A report subscription must be *Enabled* to result in emails being sent.

Existing Subscription

All users in your company with access to this page can see and edit each others 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

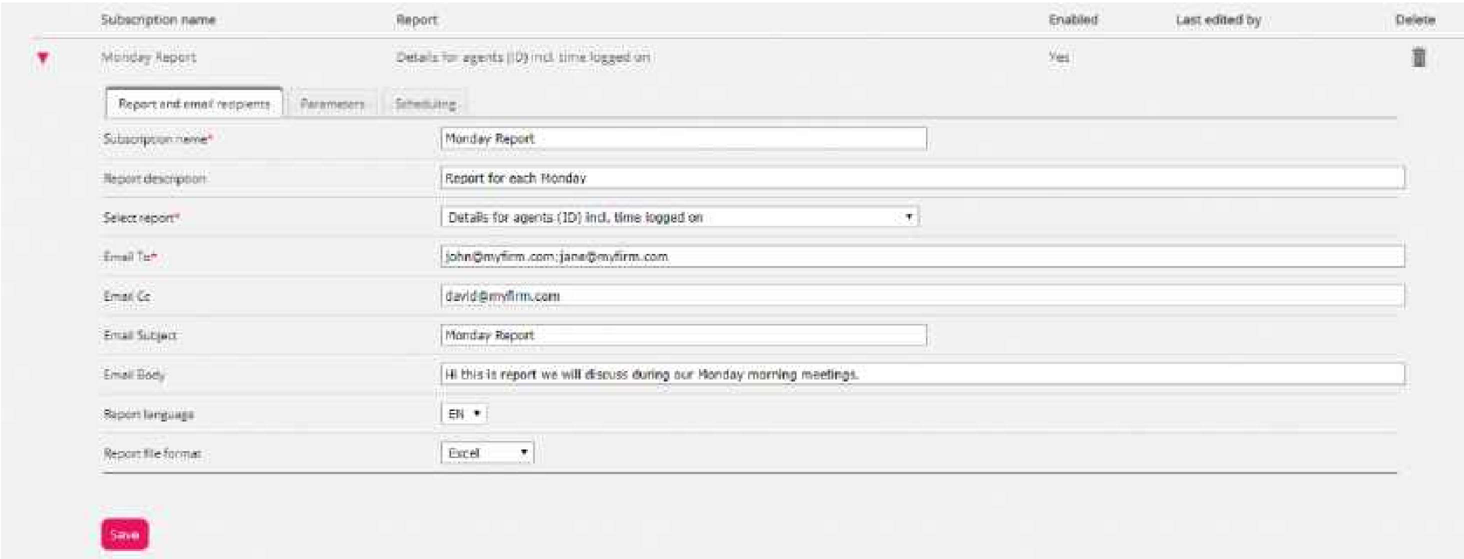
Solving Customer Interactions

Create Subscription

To create a subscription, you simply click the Add Subscription button. A new subscription with 3 different tabs will appear.

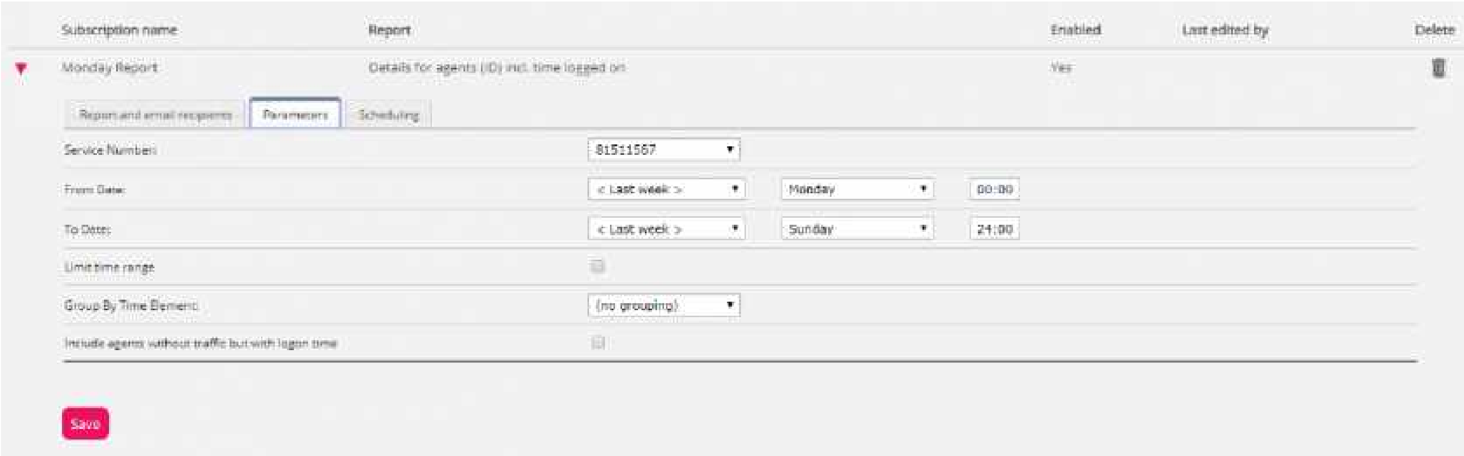
Report and email recipients

In this tab you need to choose a report, fill out information like Subscription name, report description, email recipients, and choose file format.



Parameters

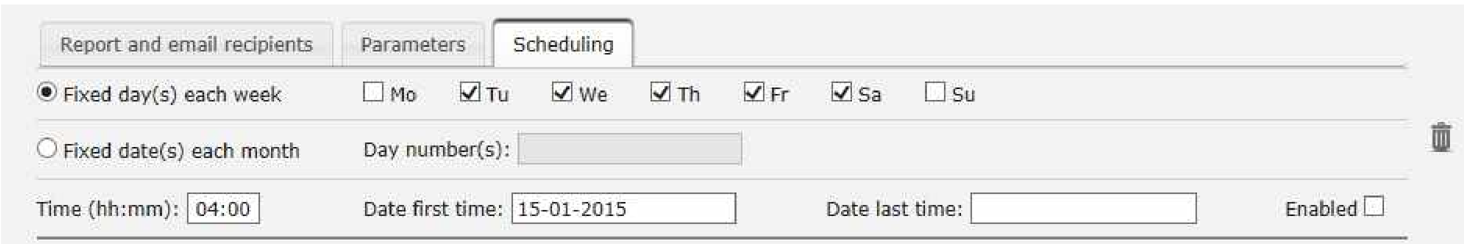
These are the same parameters as can be used when a report is customised (Columns, Rows and Default parameters). If you have chosen a customised report in this report subscription and this customised report has defined any Default parameters, they will appear here. If you change some of the parameters 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.



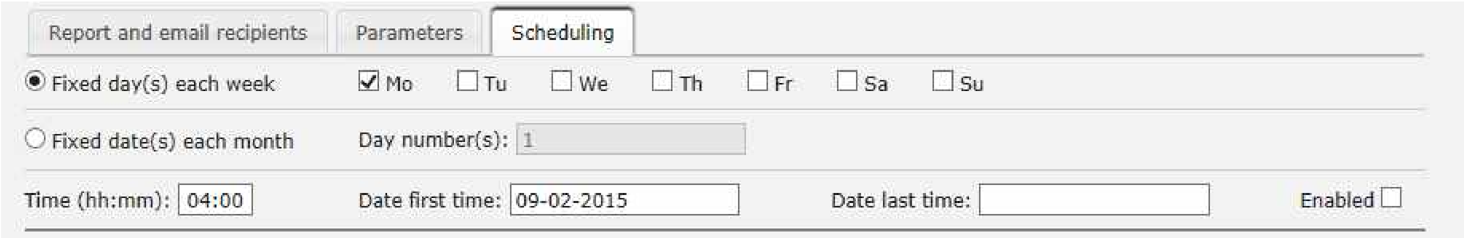
If you want a daily report for weekdays, you should select Parameters From Yesterday 00:00 To Yesterday 24:00 (and under Scheduling you should check days Tuesday - Saturday and select a Time between 03:00 and 07:00, since statistics for a whole day (until 24:00) is usually ready just after 02:00 the 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).

Scheduling

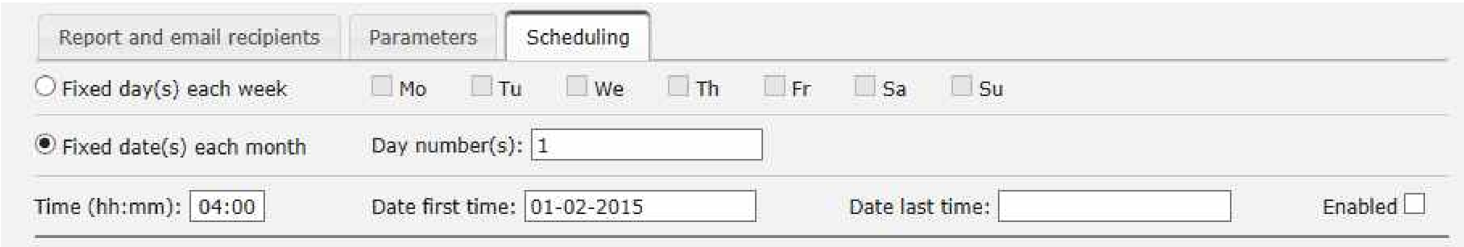
Here you configure when the report should be generated and sent. This must correspond to the report’s defined parameters. Examples:
A daily report for Monday to Friday (Yesterday 00:00-24:00) only needs to be scheduled for Fixed days Tuesday – Saturday, e.g. at 04:00:



A weekly report (Last week) only needs to be scheduled for Fixed day Monday:



A Monthly report (Last month) only needs to be scheduled for Fixed date 1st:



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.

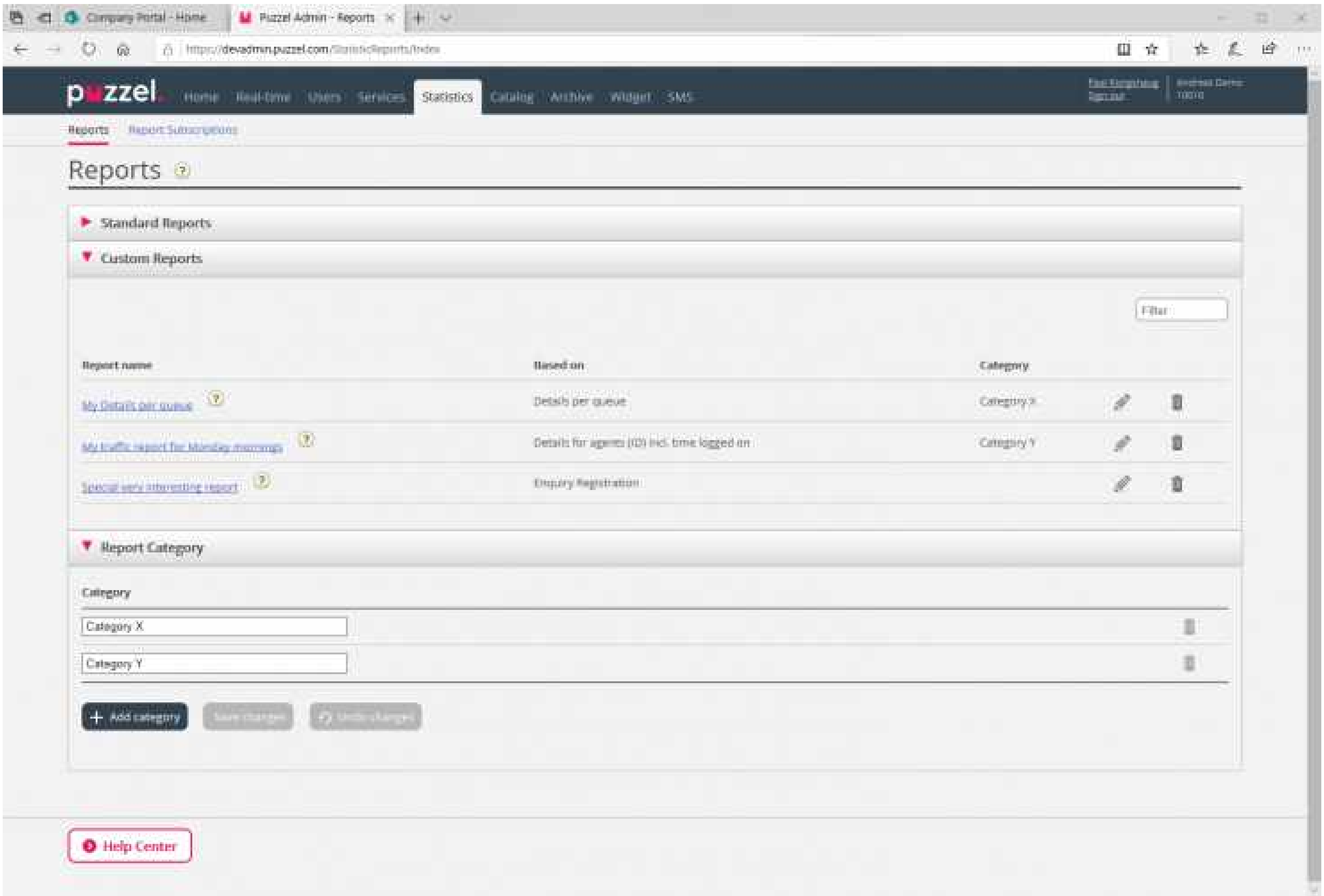
Which rows are included?

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.

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.



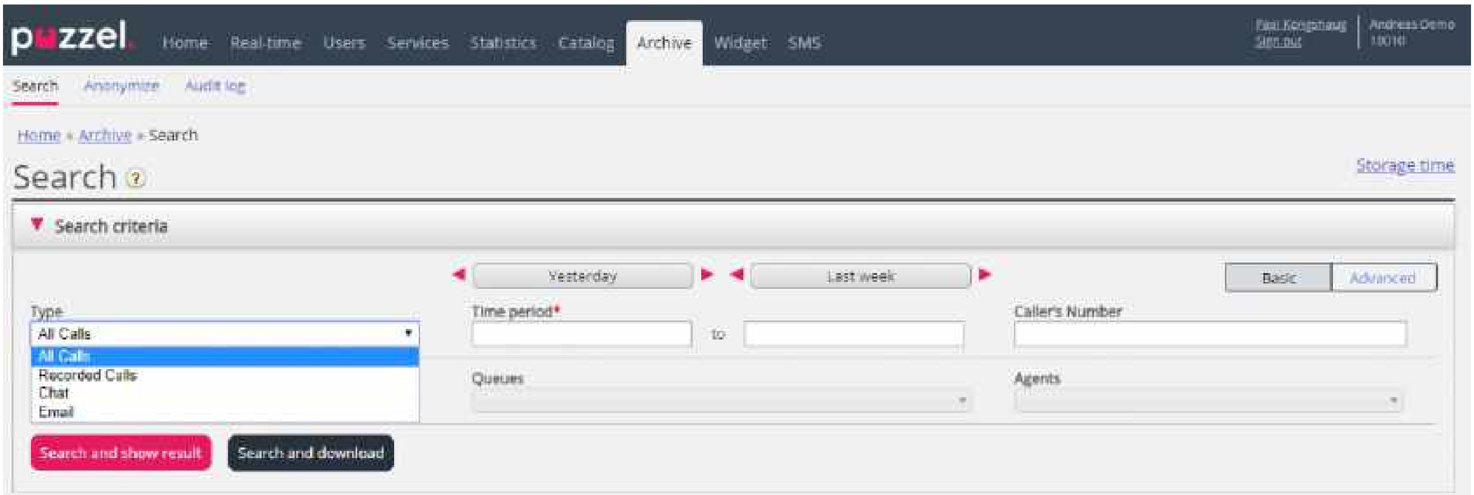
Archive

The Archive has three pages:

Page Name	Description
Search	This is the actual Media Archive, where you can find information about single calls (and recordings and possibly transcriptions) 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 who 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 can find one record for each time a user listened to/download/deleted a call recording or opened/downloaded/deleted a chat log.

Search

On the page Archive - Search, you can find information about calls (and recordings and possibly transcriptions), chats and emails (including e-tasks 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 the 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 call 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 completed 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 the call/chat ends, and the Survey score/comment might also appear a long time after the call/chat ends since the end-customer might not answer right away.

Basic Search Parameters

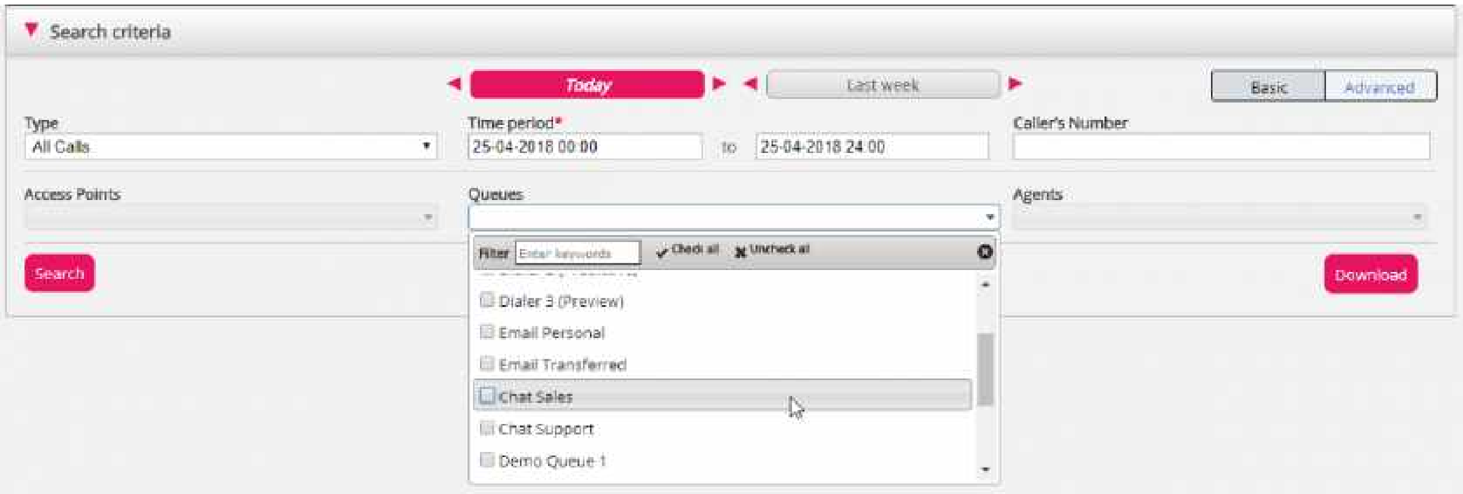
Required fields:

- ***Type****: 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*
- *Callers number/Chatters Name/From.*

In list boxes (Access point, Queues, Agents) you can select one or more entries.



Wild Card Search

Asterisk (*) can be used as a wild card in the beginning, in the middle and/or in the end of your search string in Callers number, Chatters Name/Email and From (email), and in the Advanced search fields Comment and Tags.

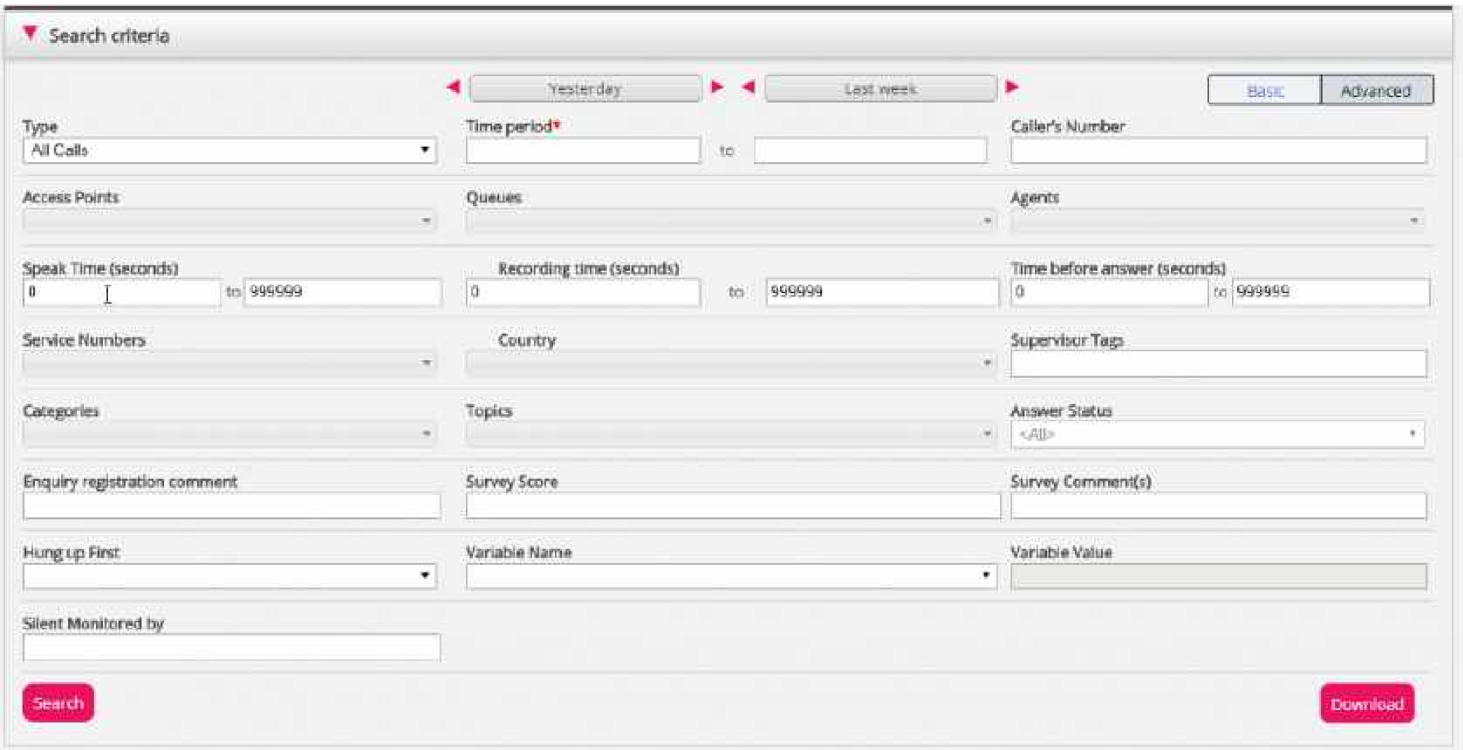
If you search for *petter* in Chatters Name/Email you will find chats that contain petter in the chat fields Name or Email (id)

If you search for 214906* in Callers number you will find calls that have a number that begins with 214906

puzzel. Solving Customer Interactions

Advanced Search Parameters

When Advanced is clicked (instead of *Basic*), more search parameters are available.

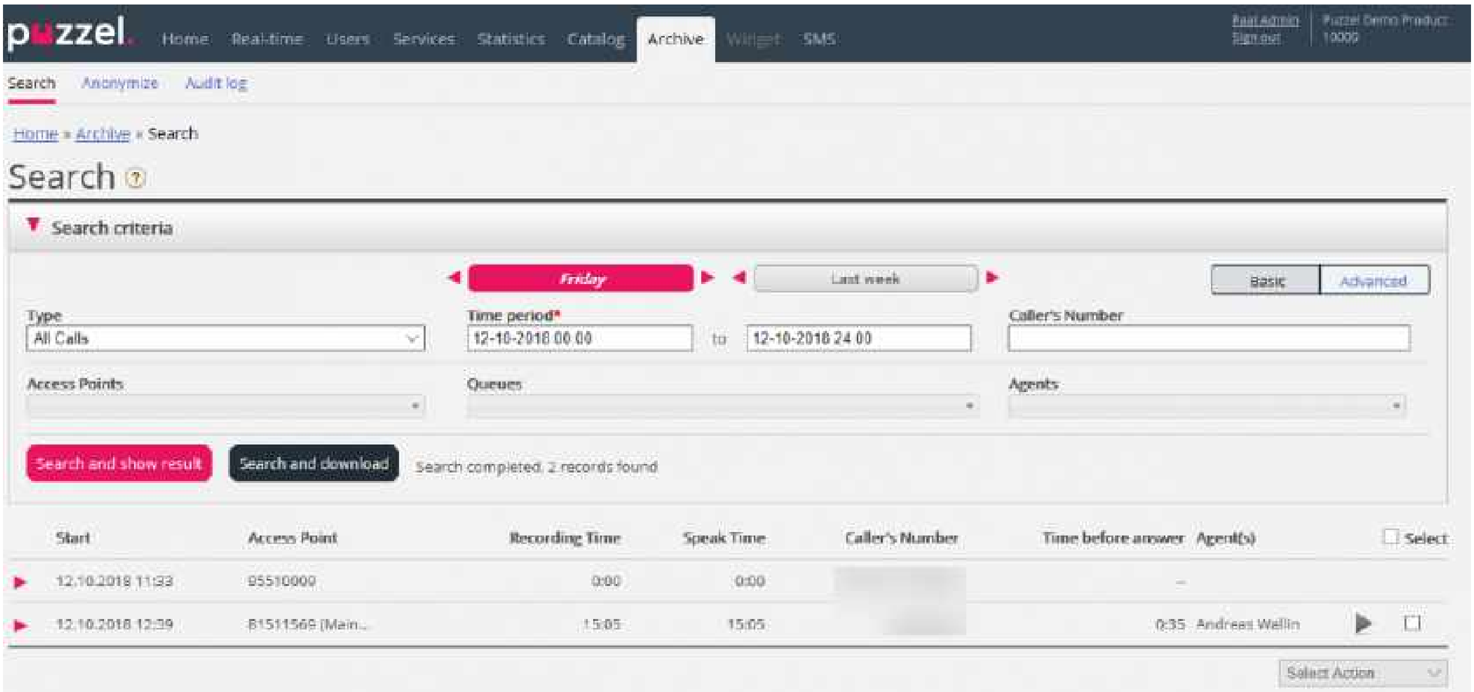


- You can search for calls/chats/emails with a value for a given variable
- For Type **All calls/Recorded calls**, you can search based on e.g. Speak time, Recording time, Time before answer, Enquiry registration Categories/Topics, Survey Score/Comment and more.
- For Type **Chat**, the Advanced parameters 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.

Search Results for All Calls/Recorded Calls

After defining search parameters, click the *Search and show result* button and your search results will appear.



If you want to download the general information about calls, click *Search and download*. See Download General information about requests for more details.

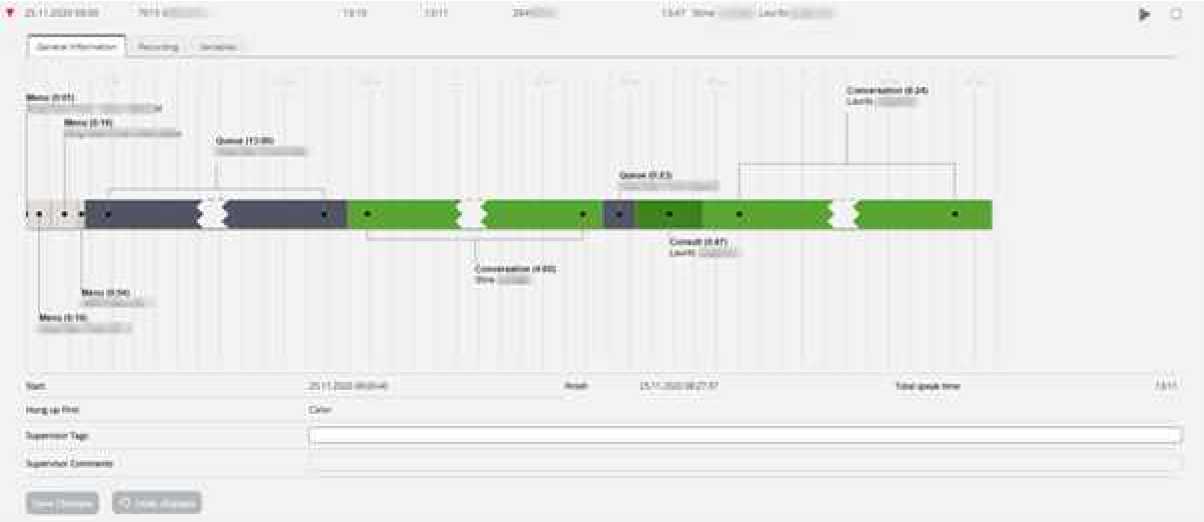
If you are looking among *All calls* you can distinguish calls that have not been recorded by the fact that they have 0:00 Recording Time and they will not have a play button next to them.

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 (directly or through a queue) 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 play button next to the call, you can see the graphical flow of the chosen call/recorded call.

General Information for Calls

In the tab **General information**, you can see the graphical flow of the call, i.e. which menu and audio modules the call went through (**Menu** events), how long the caller was in queue (**Queue** events), agent(s) he/she spoke to (**Conversation** events). If the bar in the chart is “broken”, the caller has spent more than 3 minutes in that ‘event’ (in queue or in conversation).



Consult calls

If an agent makes a **consult call** directly to another agent, the time the 2 agents are consulting (and both have ‘speaktime’ and the caller is on hold) is show as a **Consult** event (since we cannot show 2 conversation events at the same time in Archive). After the Consult event, there will be a Conversation event for the agent that was connected to the caller after the consult call ended.

If an agent makes a **consult call to a queue**, the queue allocates an agent after a while, and in this case we also generate a Queue event (for the time the agent waited in queue for an agent on the selected queue). Since we here have a queue event at the same time as we have ‘speaktime’ (Conversation event) for the first agent, the queue event is shown after the (first) conversation event, since we cannot show a Queue and a Conversation event at the same time.

If the caller hangs up while the agent consults with another agent (which might happen if the consult is “too” long), the agents are informed (“Caller hung up”) and they will hang up after a while. In this case, the Consult event will be the last event of the call.

Supervisor tags

In the **Supervisor Tags** field, you can enter a tag (e.g. “Complaint”), so that it will be easier to find this call 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.

Callback in queue, outbound calls, Agent to Agent call 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".

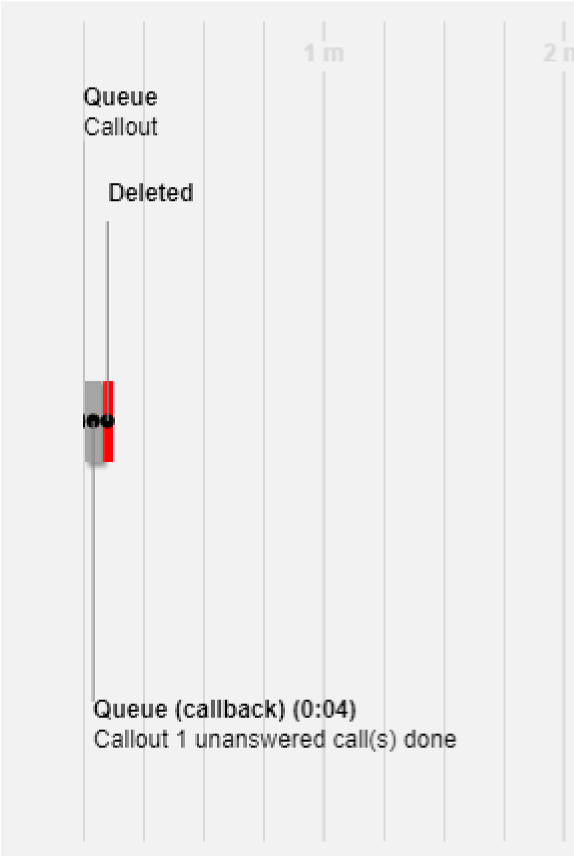
For outbound calls, the Archive shows:

- 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 "xxxxxxxx" 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 Speaktime was 3:28.

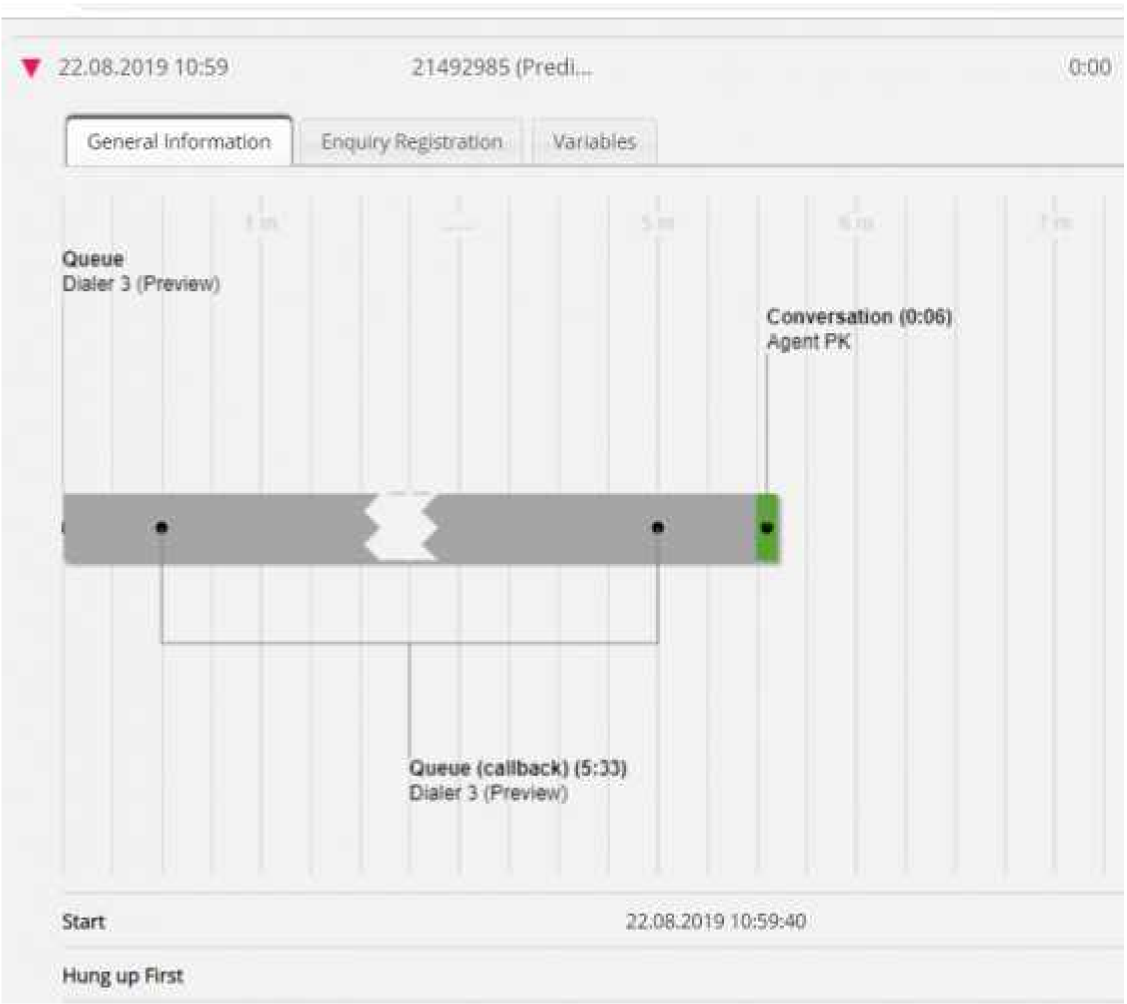
Time before answer is only 1 sec, since agent1's softphone auto-answered.

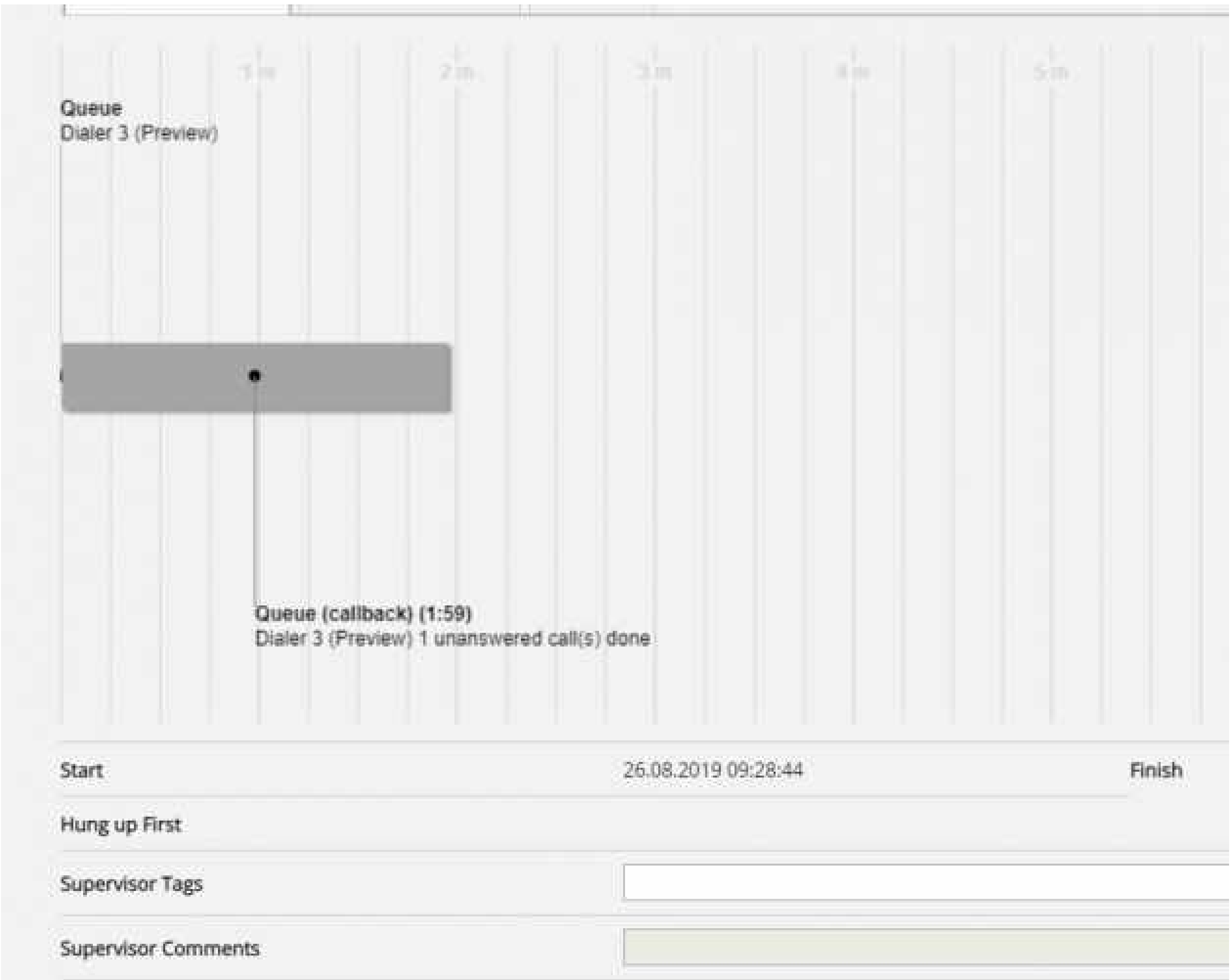
If agent1 called to agent2 and agent2 did not answer, there will only be a short *Conversation* event for agent1 (e.g. 30 sec) and no *Consult* event, and agent2 will not be listed as an involved Agent since he did not answer.

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.

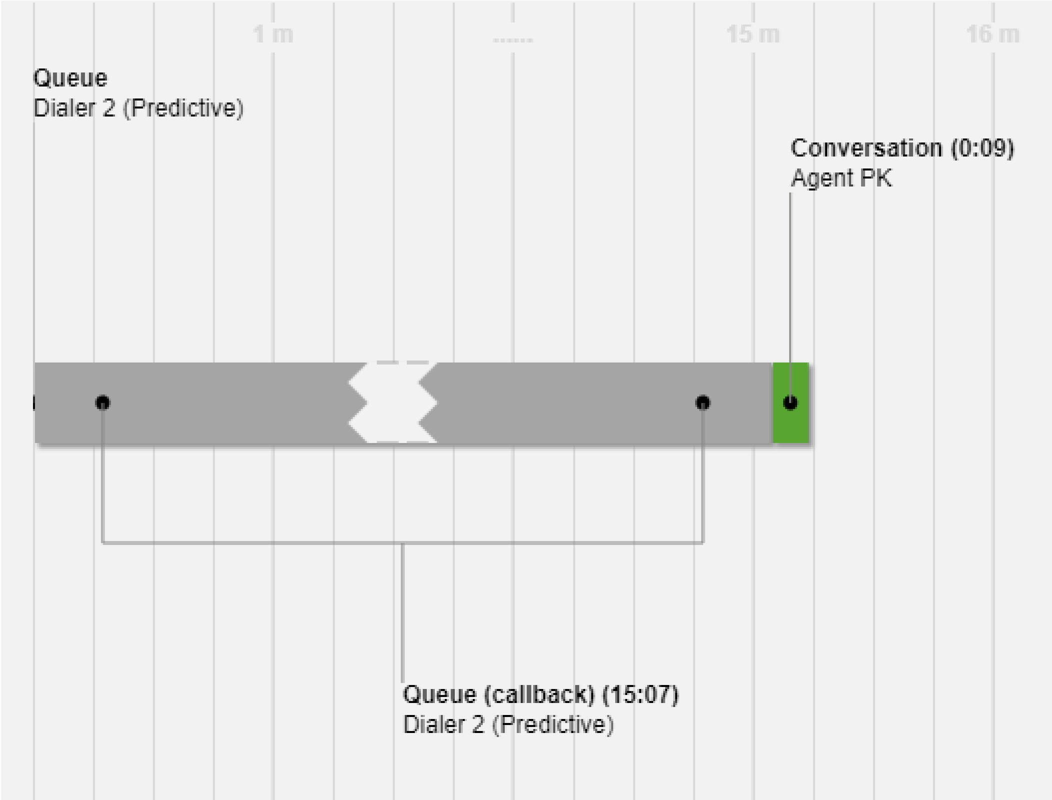
The ***Queue (callback)*** event's duration represents the time from the contact was put in Dialler queue until contact answered (or call end due to no answer).


22.08.2019 10:59
21492985 (Predi...
0:00
General Information
Enquiry Registration
Variables
Queue
Dialer 3 (Preview)
Conversation (0:06)
Agent PK
Queue (callback) (5:33)
Dialer 3 (Preview)
Start
22.08.2019 10:59:40
Hung up First

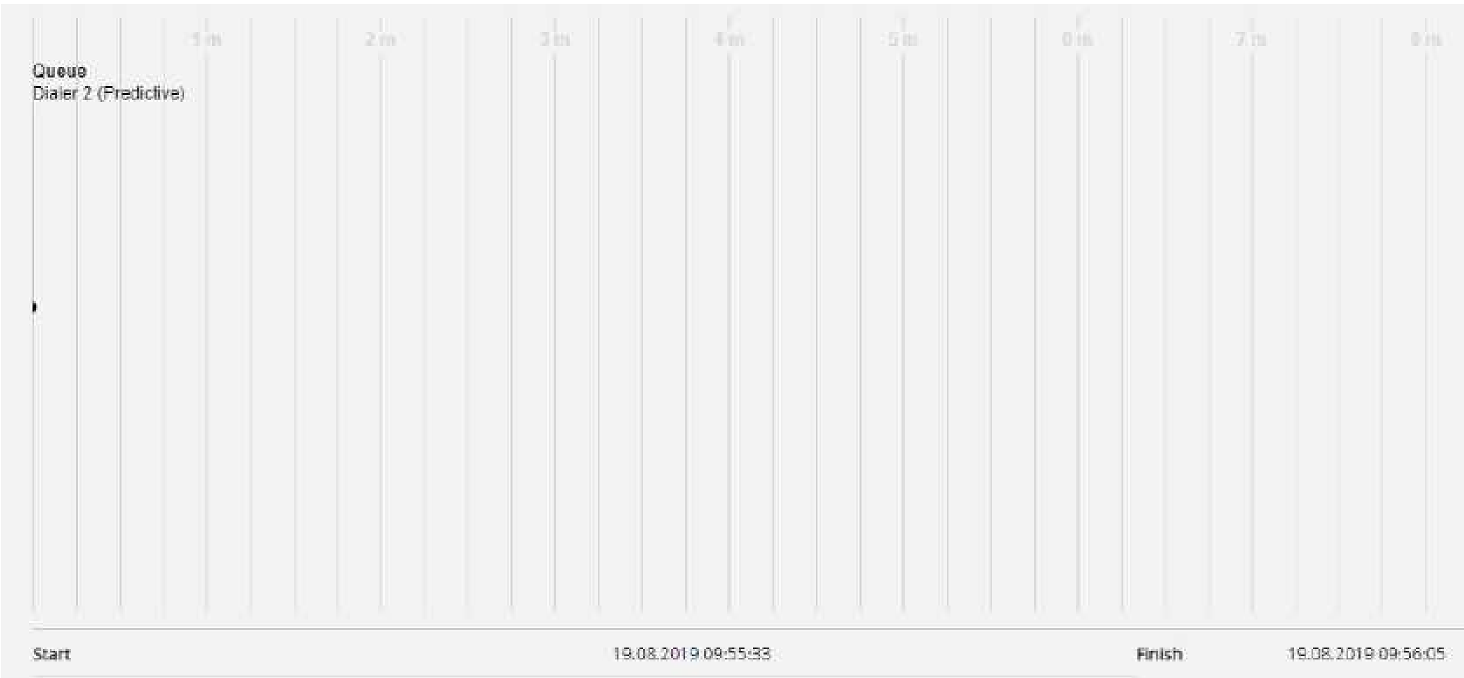


With **Predictive/Power/Progressive** mode, the Dialler calls the contact first, and an agent is called only if the contact answers (and agent is available). If the contact did not answer, there will be a *Queue* event with no duration, a *Queue (callback)* event and a *Menu* event only if a silent call announcement was played to the contact.

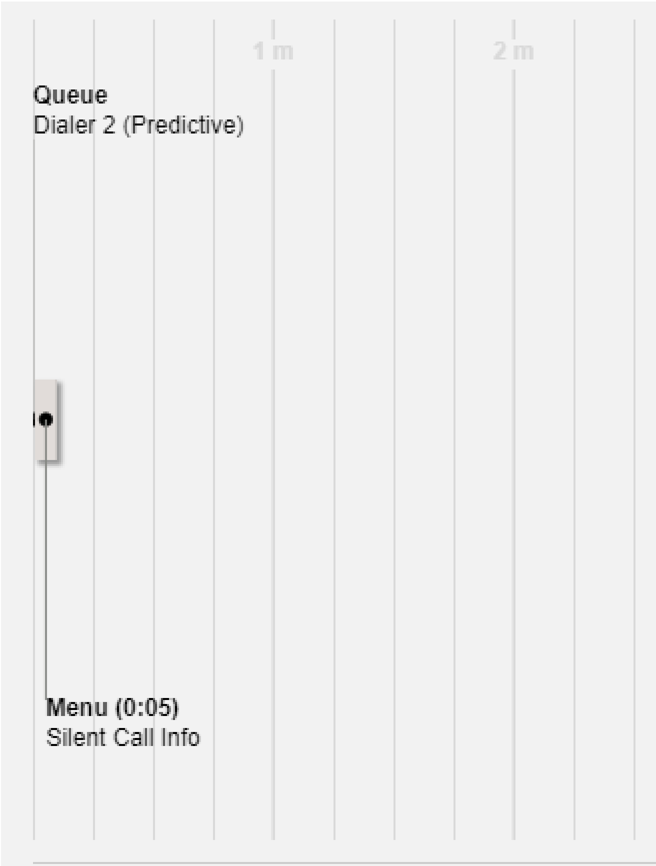
Answered



Not answered



Silent call announcement



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.

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!

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.

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*.

Call variables

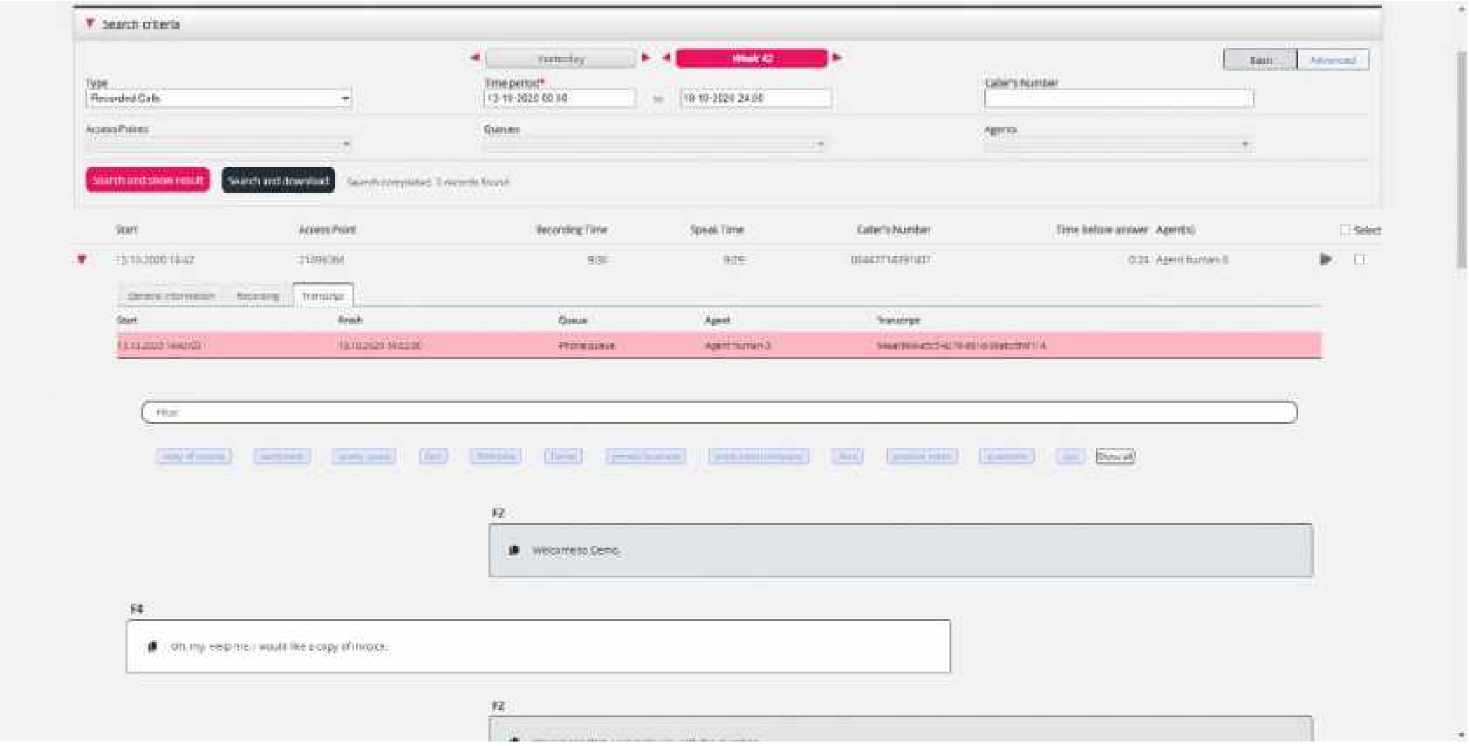
If it’s configured that your solution stores the value for a specific variable in the call’s raw data, this variable is searchable and visible in the Archive. Example: If the solution behalf of the caller does an external look-up in your CRM system with the caller’s number as parameter, and your CRM 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.

puzzel. Solving Customer Interactions

Call recording transcriptions

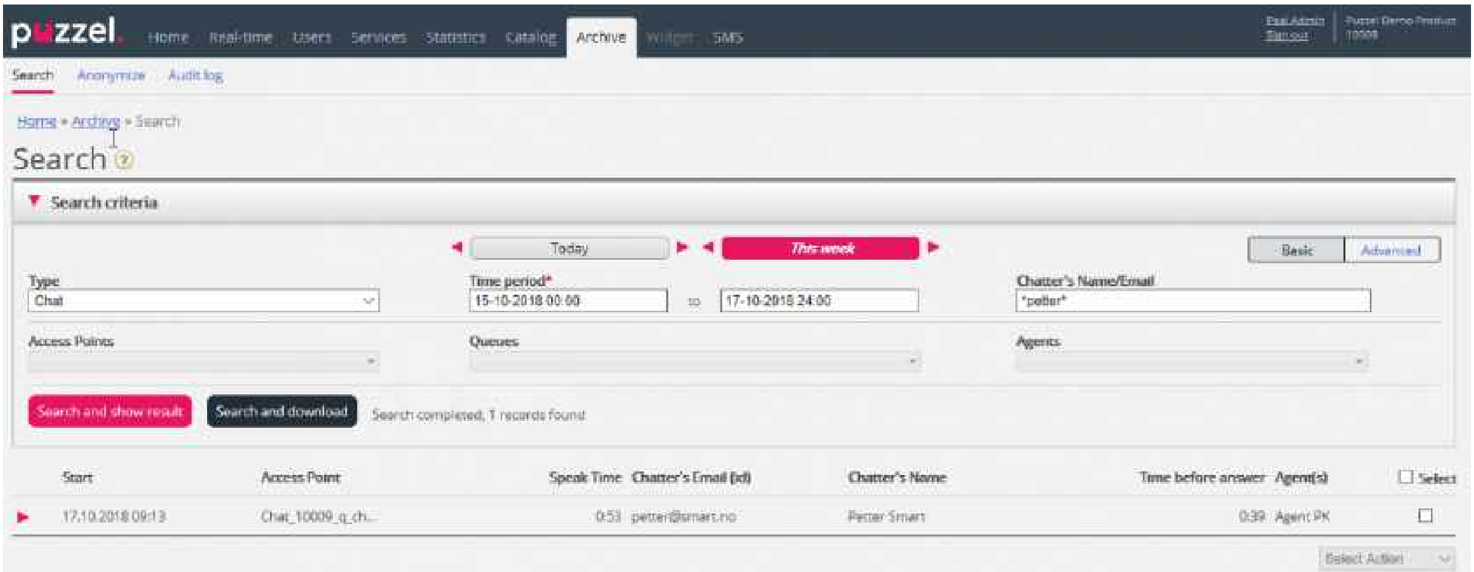
For customers with call recording transcription shown in the agent application's Agent Assist, we can also show these transcriptions in the Admin Portal's Archive. If a call is recorded and a transcription is made, this transcription will appear in a separate tab in the Archive next to the Recording tab, if configured by Puzzel.



You can use the filter input box to search for and show parts that contain specific words in the transcription, and you can click on one or more of the key words to see where these appear.
If an incoming call has 2 call recordings since the caller spoke with 2 agents, there will be 2 rows in the Transcription tab as well.

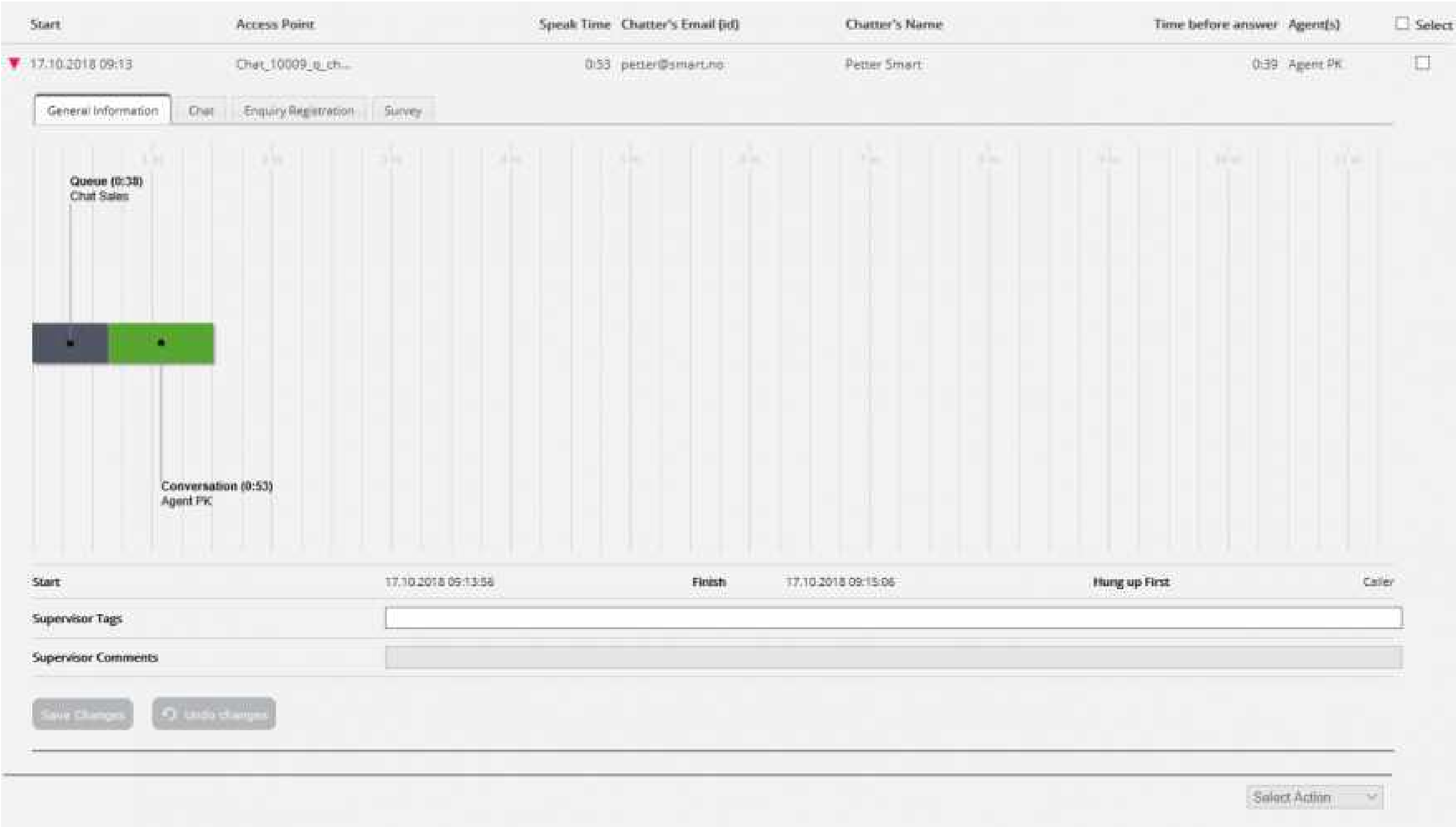
Search results for Chats

Select Type = Chat and enter your search criteria. When you click "Search and show result", chats that match your search will appear.



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.

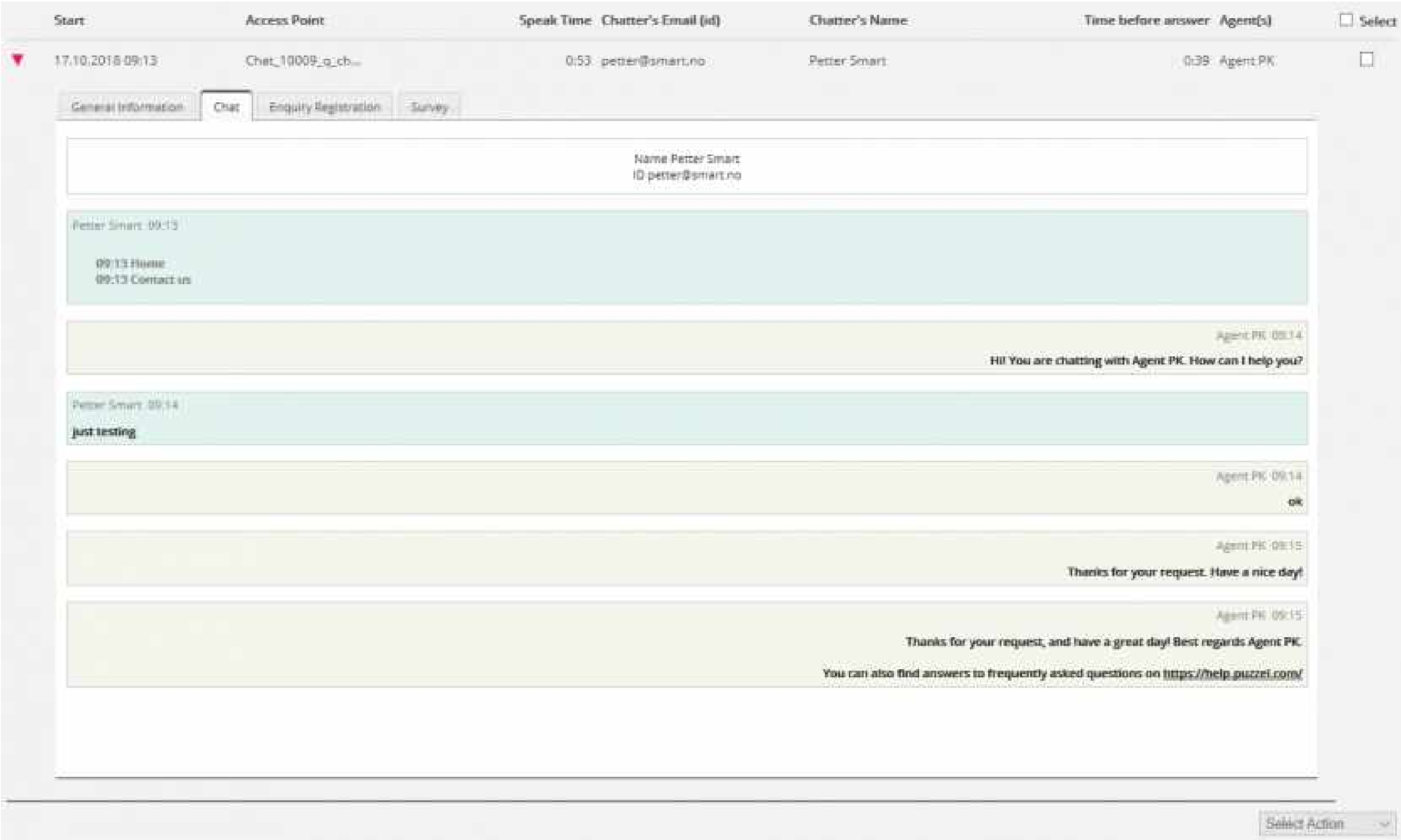


Who ended the chat first

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.

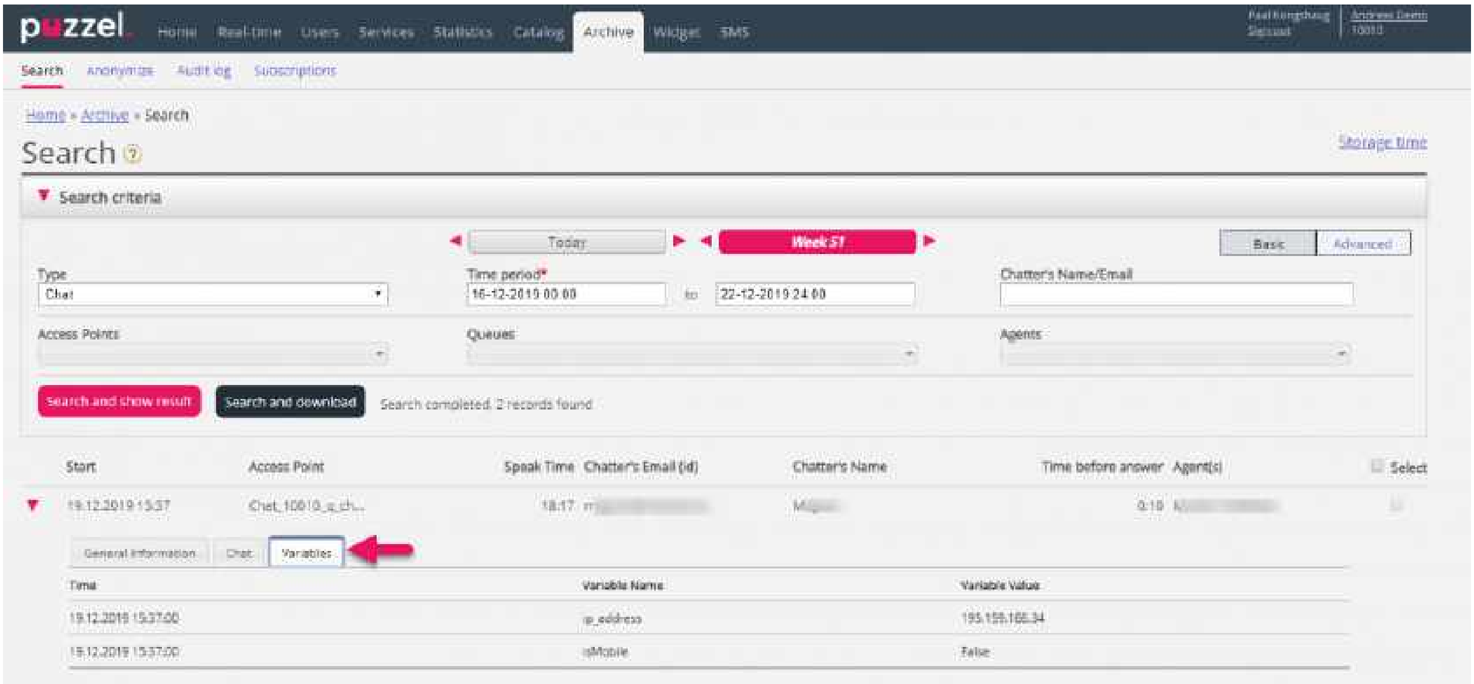
Chat Tab

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.



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.

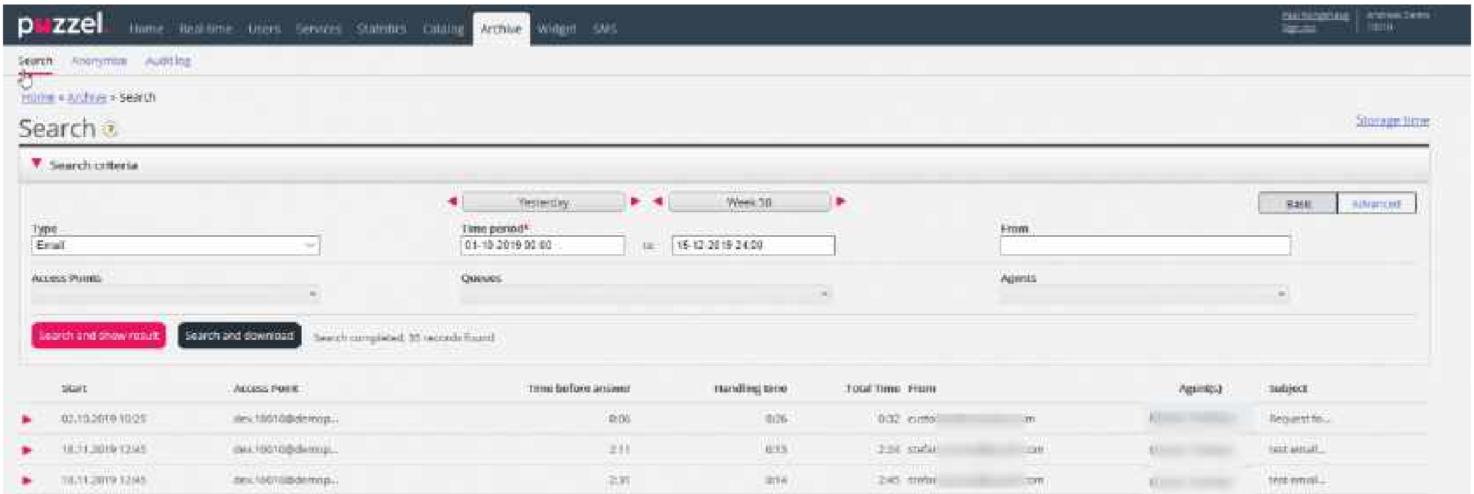


An admin can be given access to delete recordings and chat logs from Archive. If a chat log is deleted from Archive, you will see the Chats General info and that there was a chat log but that it's now deleted.

Search results for Email

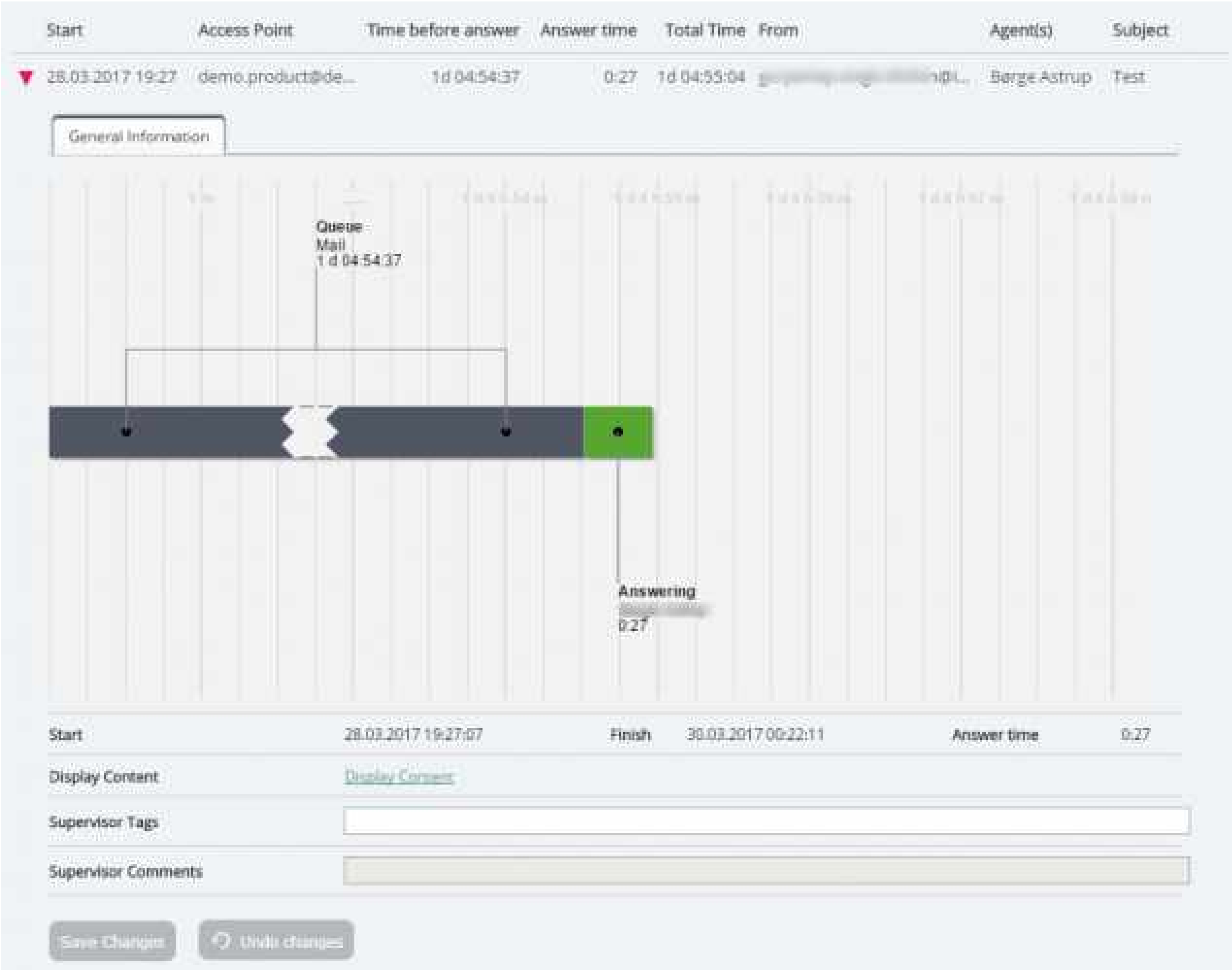
Media type Email in Puzzel can be ordinary emails or written requests from any system queued in and distributed by Puzzel (often called e-task). Media type Email also includes Scheduled tasks.

When you search, requests with media type Email that match your search will appear.



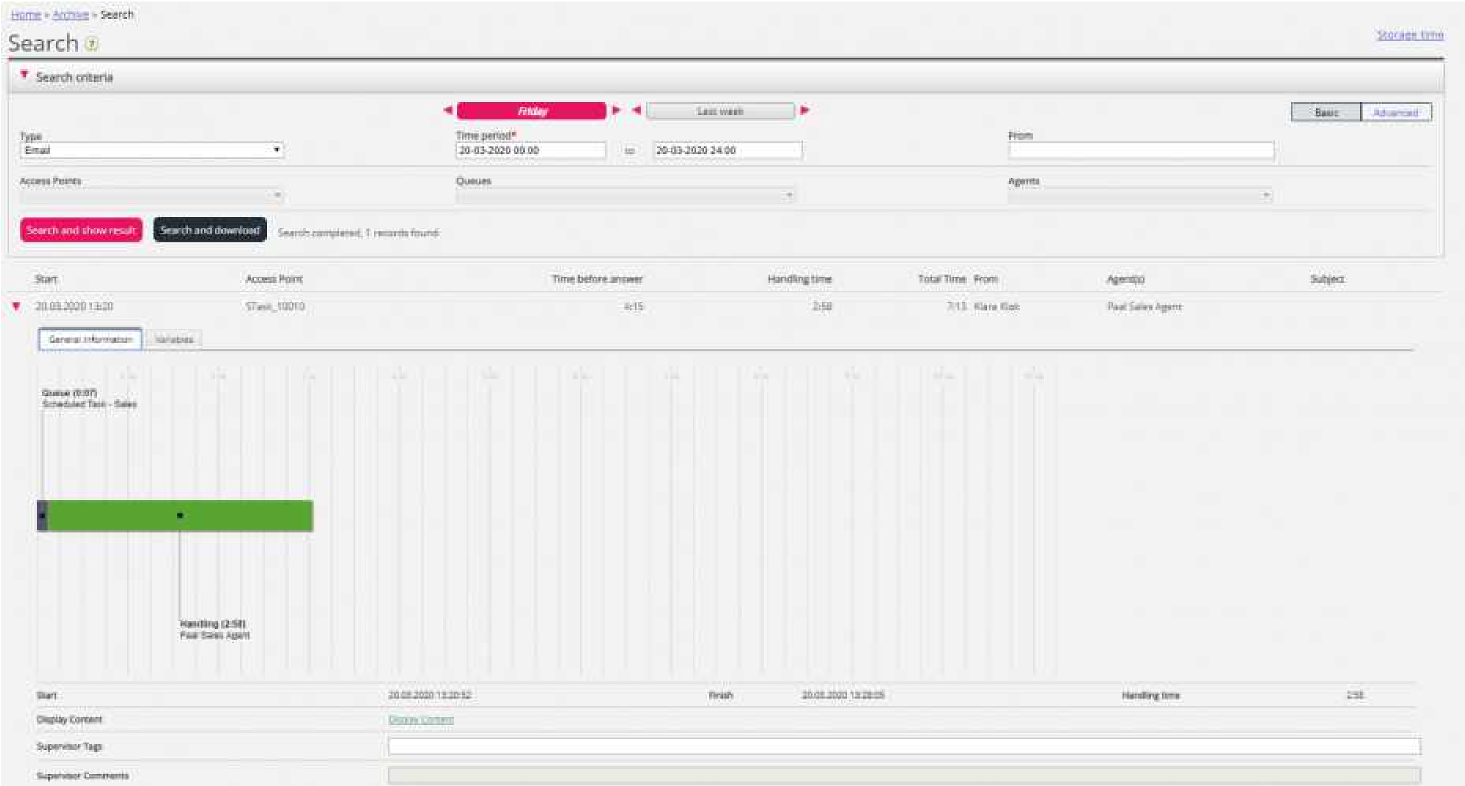
In the General information tab for emails, you will find *Time before answer* and *Handling time*. Handling time is the time the agent has had the email dialog tab open in the agent application.

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.



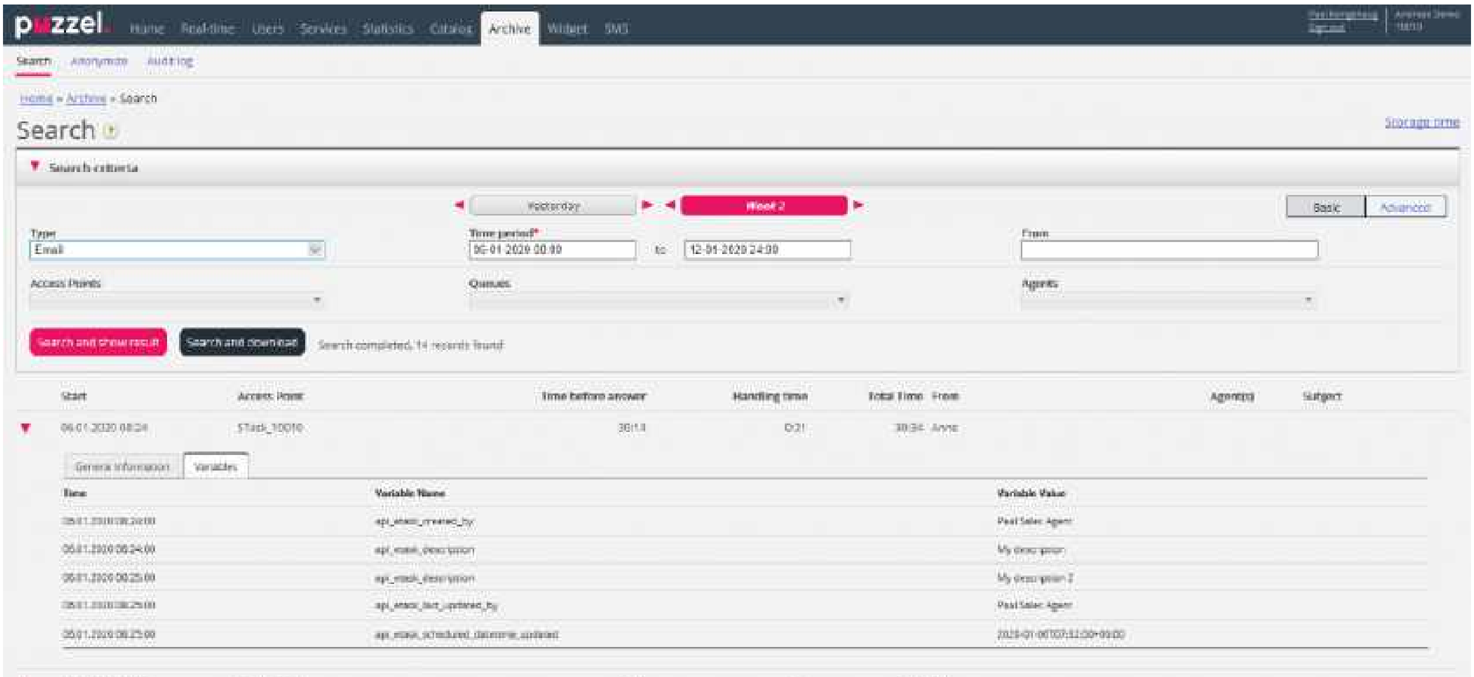
An email in queue not yet sent to an agent will appear in the Archive, but we only present queue arrival time since we do not know when it will be sent to an agent or how much time the agent will use to handle it.

Scheduled tasks in Archive



A Scheduled task is shown with type email, and with the contacts name as From. The scheduled task will appear with very limited information in Archive some minutes after its 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.



Enquiry registrations in Archive

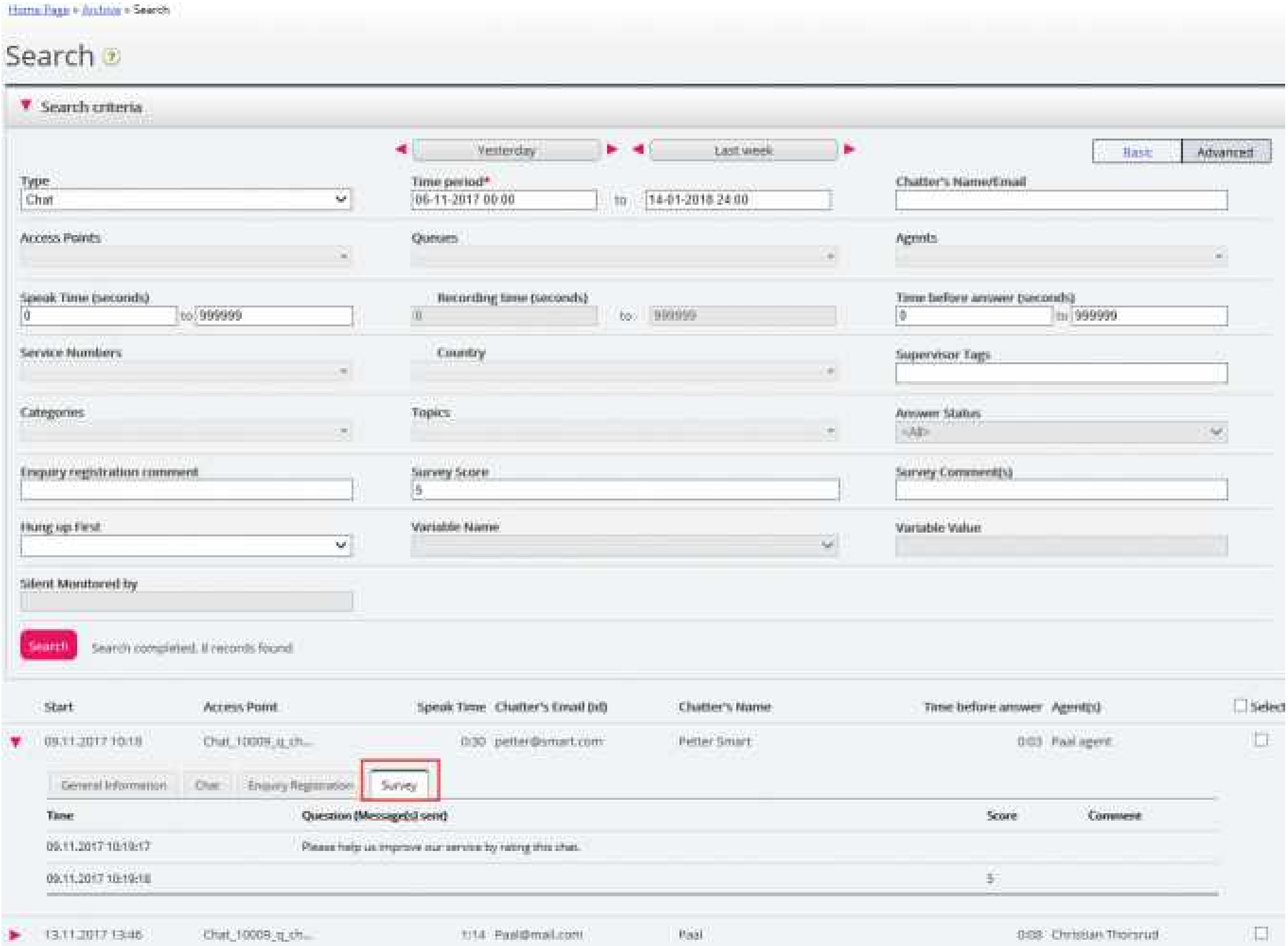
In the Agent Application, agents can register what the call/chat/email was about using Enquiry registration. When an agent answers a call/accepts a written request, a new Enquiry registration tab appears (if configured). Since calls can be transferred to other agents and Enquiry registration is optional, 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.

> **Note**
>
> 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.

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.



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 answers 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.

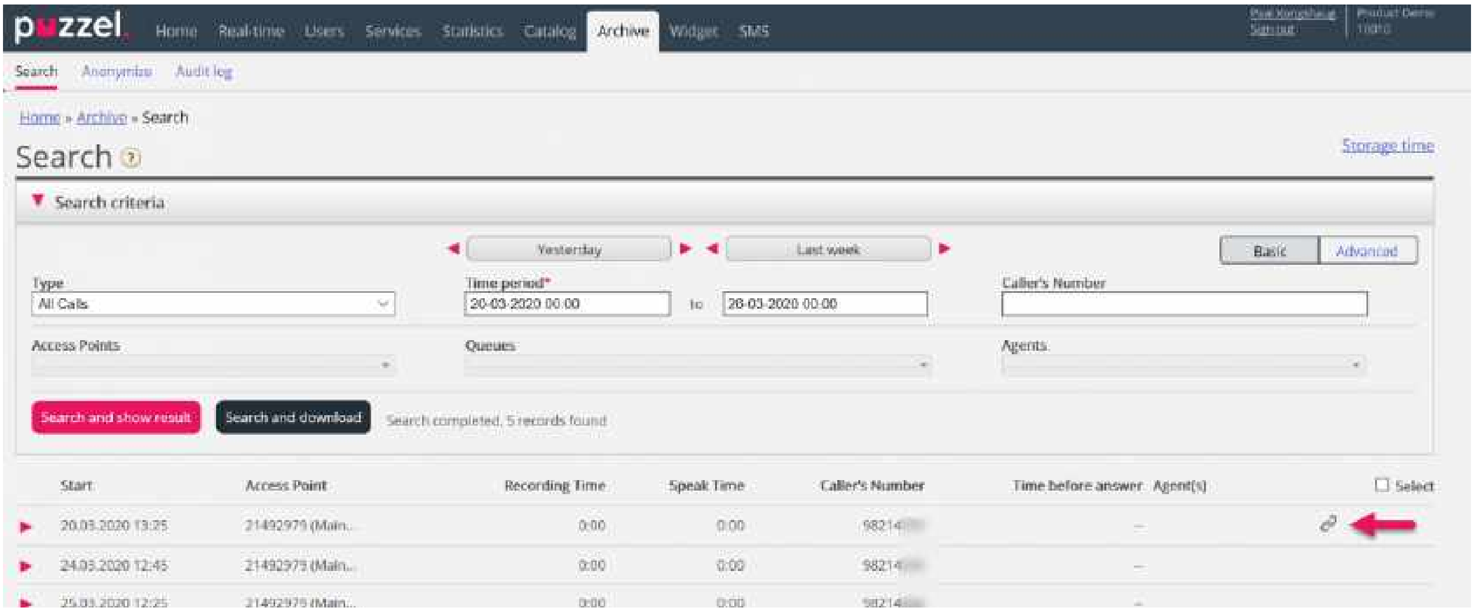
Relevant search fields under Advanced search are:

- ***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**

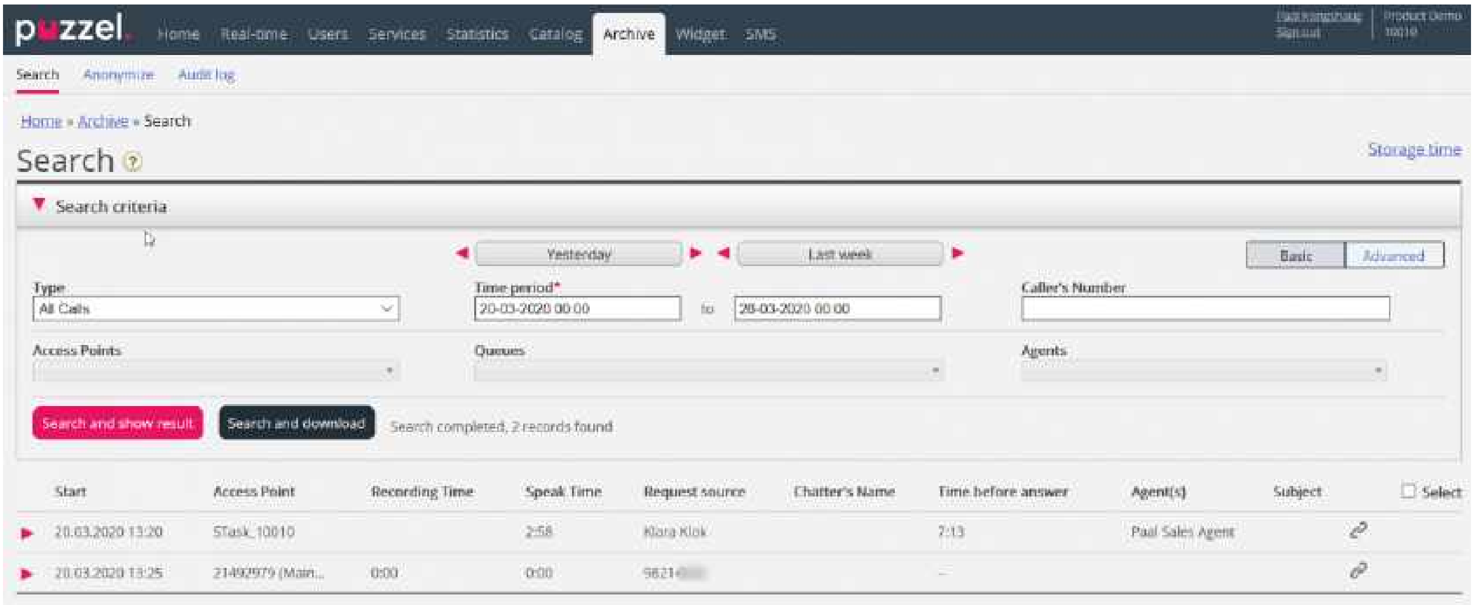
To list all callers/chatters for a day where any Survey comment is received, search for All calls/Chats with Survey Comment = *.

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.



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.

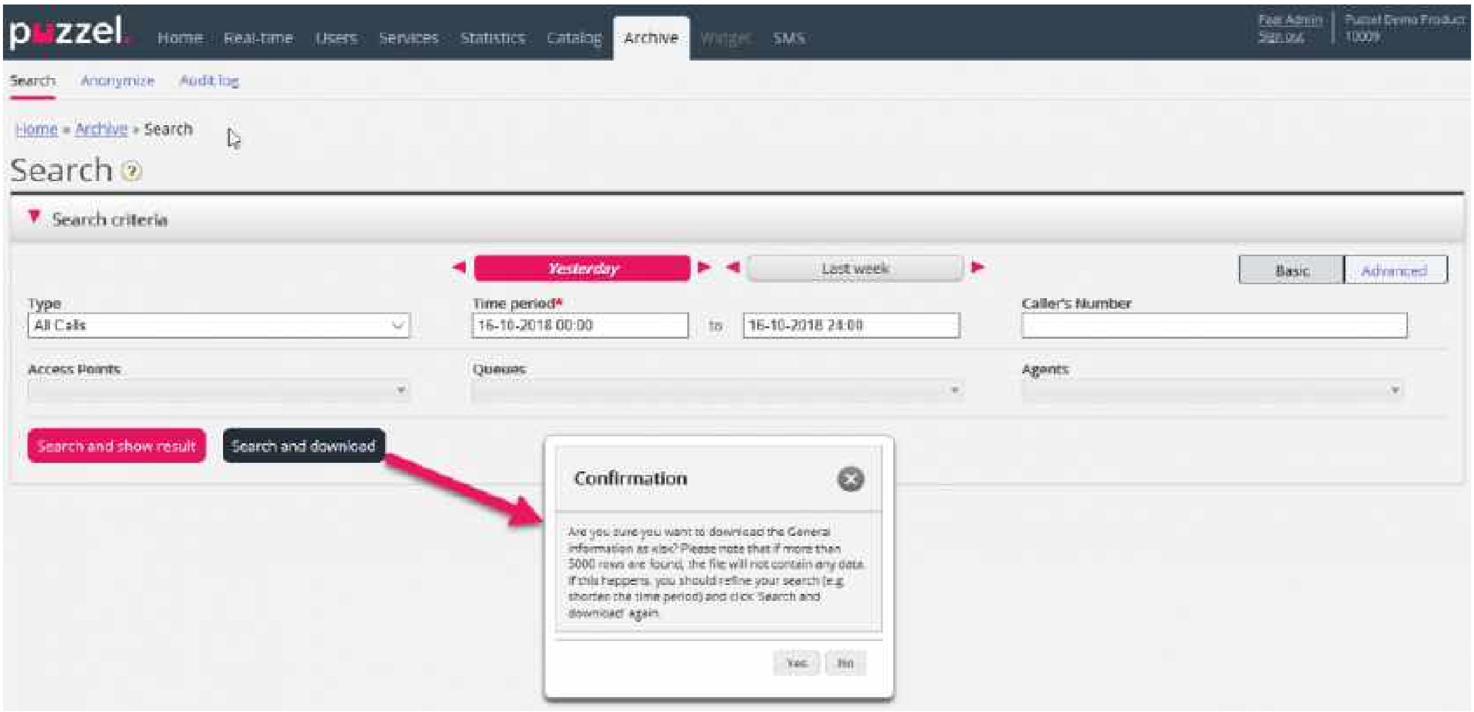


You can also select Type *All media types* and then search for requests with e.g. one agent and a time period as search parameters, so that you can see all found requests in the same view.

Download general information about requests

In the Archive, you can search for requests (calls/chats/emails) and in your browser you can study the found requests General information and access the requests 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 wil be done and an xlsx file will be generated and downloaded.



General information about a request is metadata like the Callers number/Chatters name/emails From address, Access point, Start time, 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 the 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 the 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 emails 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	Queue The name of the first queue this request was in
QueueStartTime	QueueStartTime The date and time the request arrived in the first queue
TimeInQueue	TimeInQueue How long the request was in the first queue (in seconds)
AgentId	AgentId The id for the first agent that answered/accepted the request
AgentName	AgentName The name for the first agent that answered the request
AgentSpeakStart	AgentSpeakStart The date and time the first agent answered/accepted the request
AgentSpeakTime	AgentSpeakTime How long (seconds) the request was connected to the first agent
Queue2	Queue2 The name of the last queue this request was in
Queue2StartTime	Queue2StartTime The date and time the request entered the last queue
TimeInQueue2	TimeInQueue2 How long (seconds) the request was in the last queue
Agent2Id	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

Column name	Description
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 exists 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.
EnqReq	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.
SurveyScore	The actual score received for the SMS/Chat Survey

Note

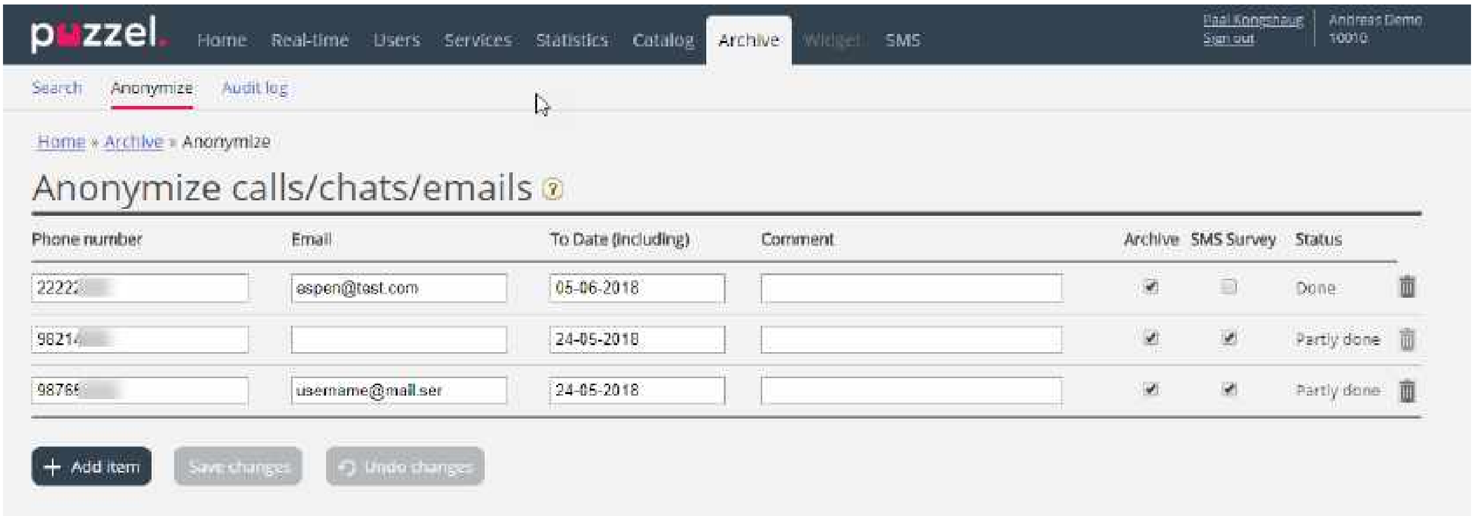
The Archives General information is NOT Raw data. The Archive contains quite detailed information about calls/chats/emails, but this is simplified information and less detailed that what is found in Raw data. The main differences between Raw data and Archive visualization is explained in the Puzzel Raw Data detailed description document, found here.

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.

Anonymize

On the page *Archive Search* you can search for calls/chats from a persons 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.



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 ***).

> **Note**
>
> 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.

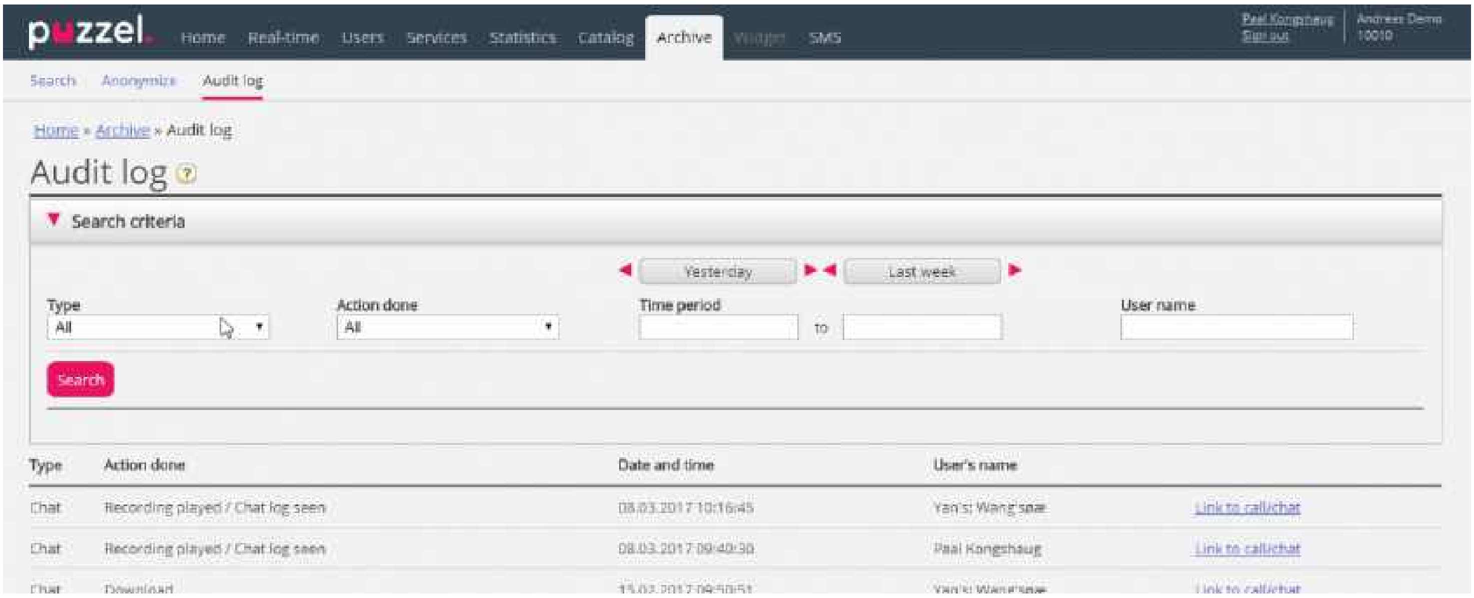
If a user searches for requests in the Archive and an anonymized call/chat/email appears in the result (e.g. when searching for all requests to queue X yesterday), the anonymized call/chat/email will not include callers number/chatters id/email From address, but instead anonymized.

> **Note**
>
> 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 callers number/chatters id (email address) from the requests General information, you must delete the recordings/chat logs first.

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 in 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 recording or a chat log.



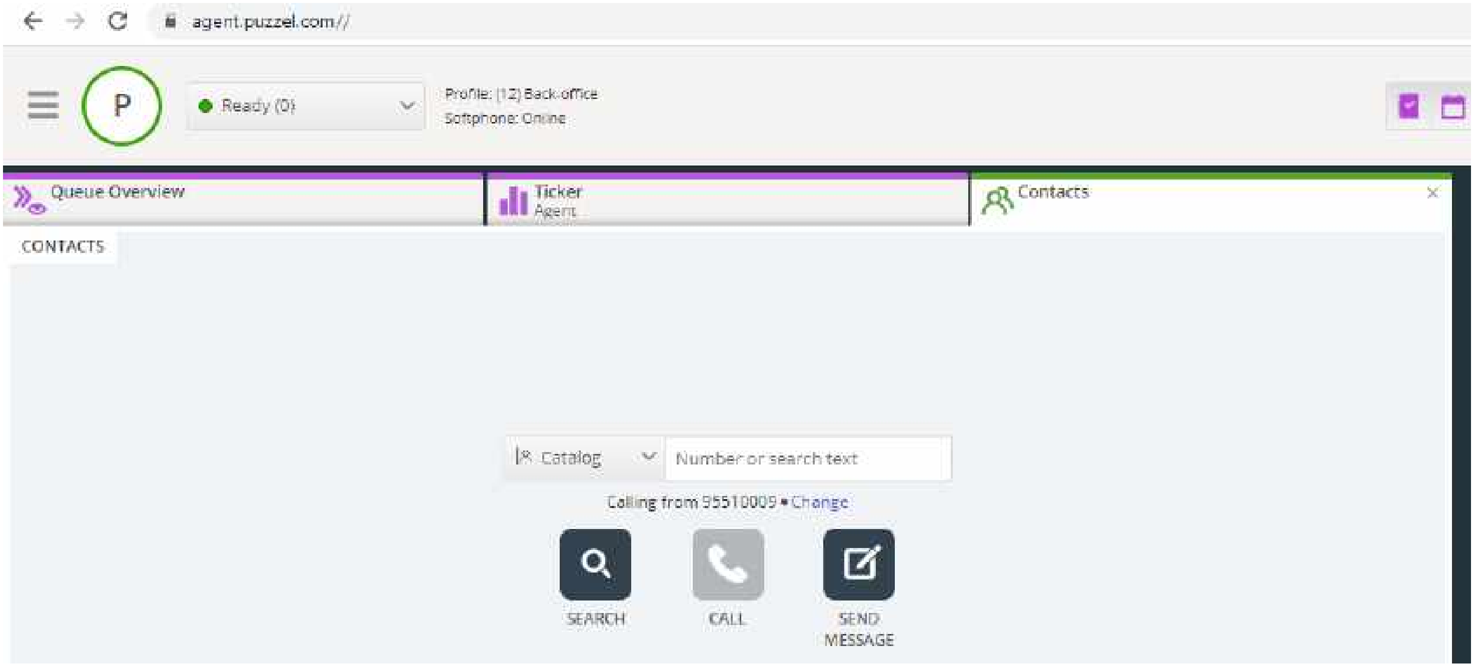
When you search in this log, you can specify Type (Recorded calls or Chat), Action done (listen/download/delete), User that accessed the content and/or Time period.

When an old calls/chats 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).

Catalog

In the Catalog tab in the Administration Portal you can manage your organisations 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 Contacts tab:



There are 3 ways to add contacts in your organisations catalog:

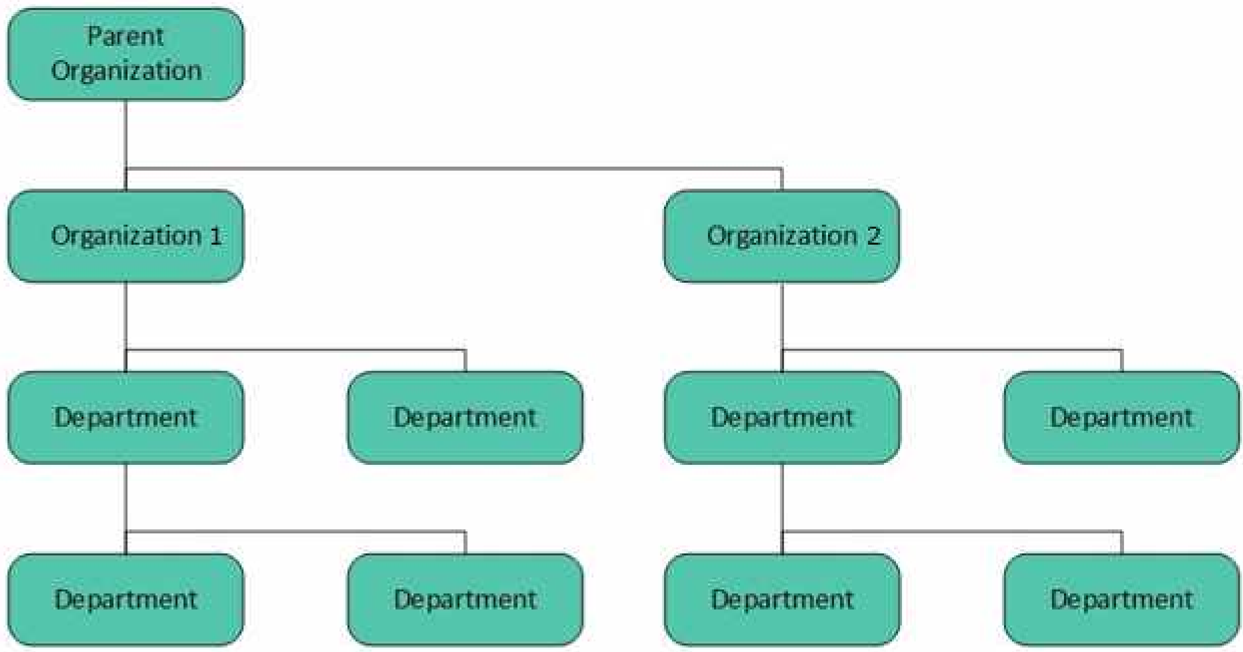
- ***Manually** add and edit contacts in the catalog through the Administration Portal.*
- *Import a **file** with a list containing your contacts by uploading it to Puzzels FTP server.*
- *Import contacts through a **sync client** installed in your Exchange or similar environment.*

In addition to contact information, the contacts 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.



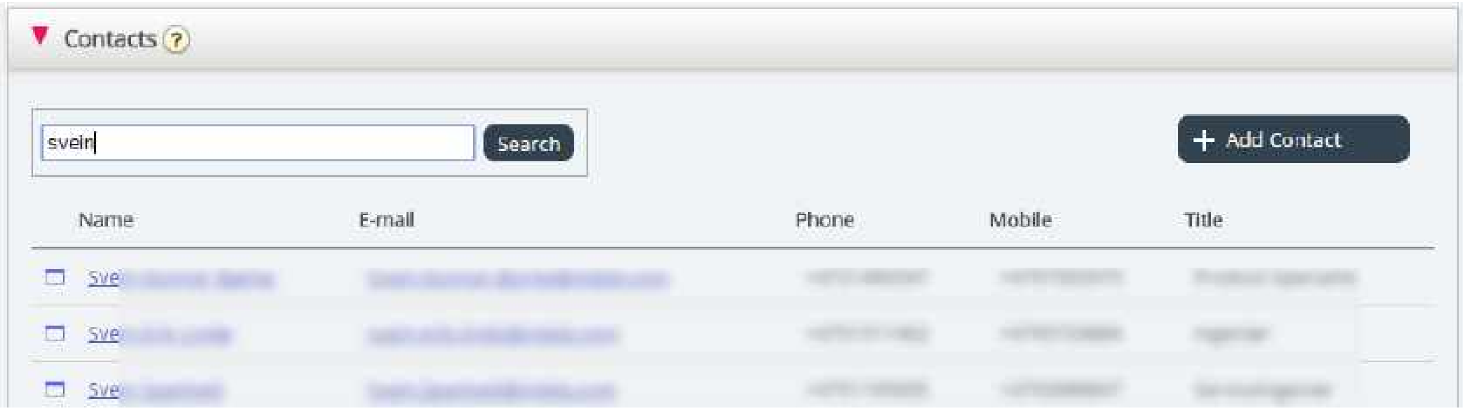
A Puzzel technician must first create the Parent organisation and Organisation when setting up your catalog. With sufficient access rights, you can create the underlying departments and sub-departments, and which contacts that belong where.

Catalog accordions - Contacts

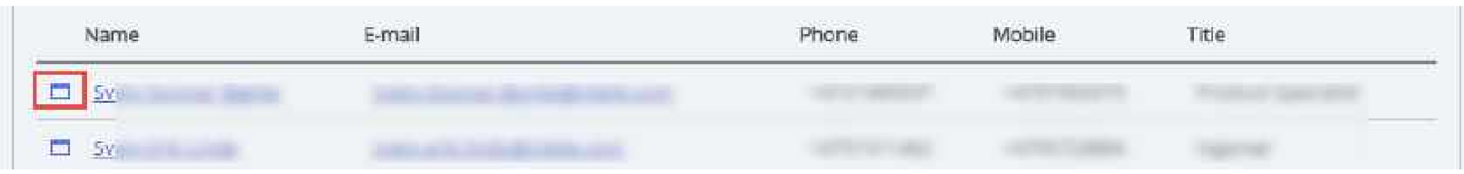
Under Contacts you can search for your companys contacts. You can search for match in all contact fields, e.g. name, e-mail address, phone, title, description and services, and you can search with multiple words separated with space. A search returns rows that begin with your entered text.

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 contacts details and calendar. With sufficient access, you can edit some of these details.

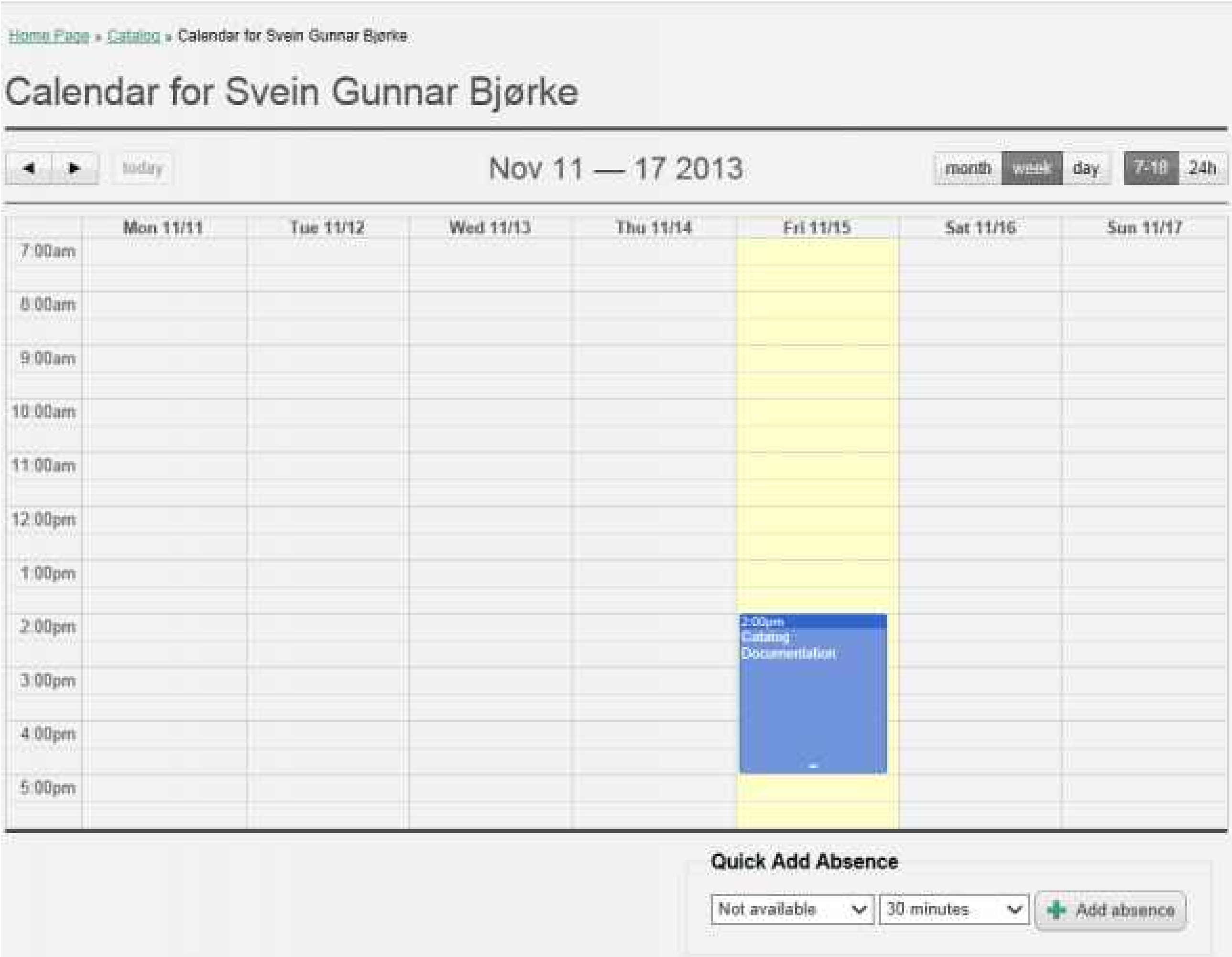
Maximum 500 contacts are listed in a search result.



Calendar



If you click on the calendar icon next to a contact name, the contacts calendar will appear.

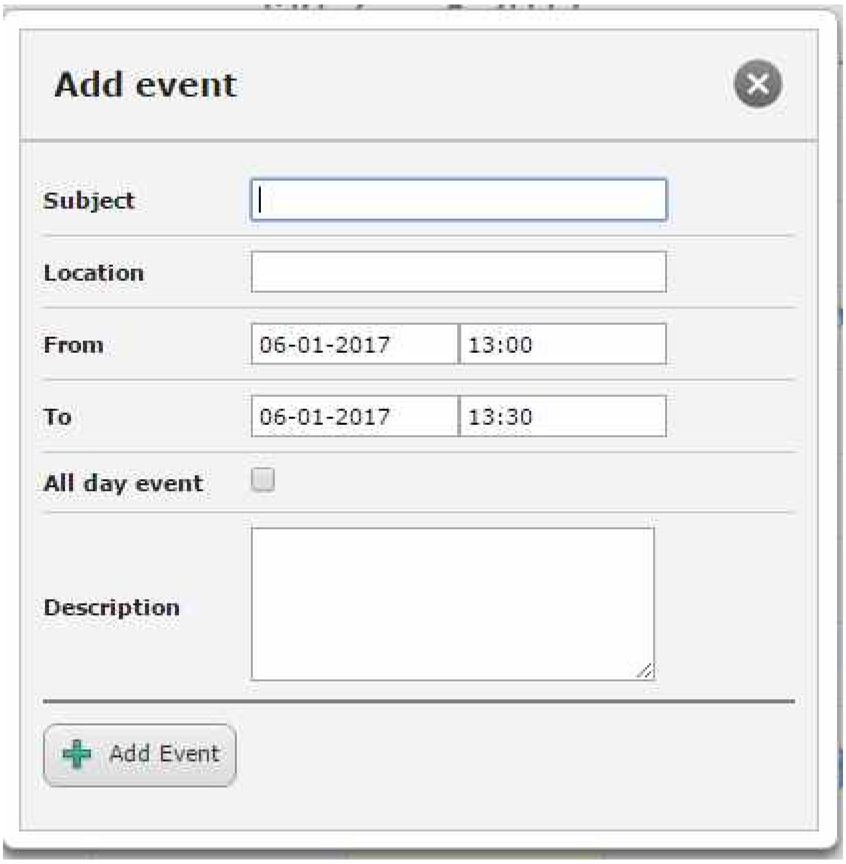


You can change the view of the calendar (month, week, day or 7-18, 24h) by using the buttons in the upper right corner.

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).

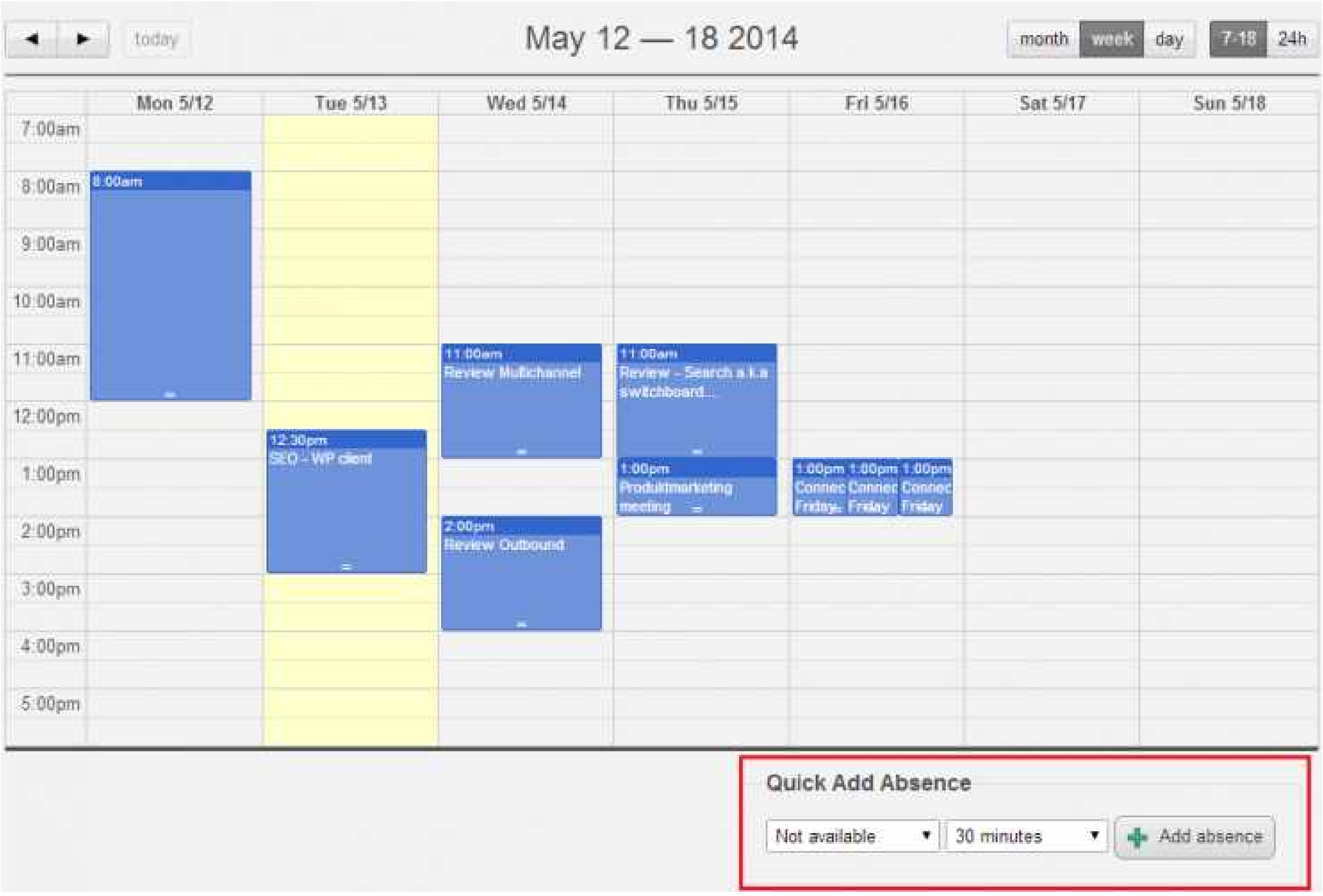
Adding an appointment

If you have sufficient rights, you can add an appointment to a contacts 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.



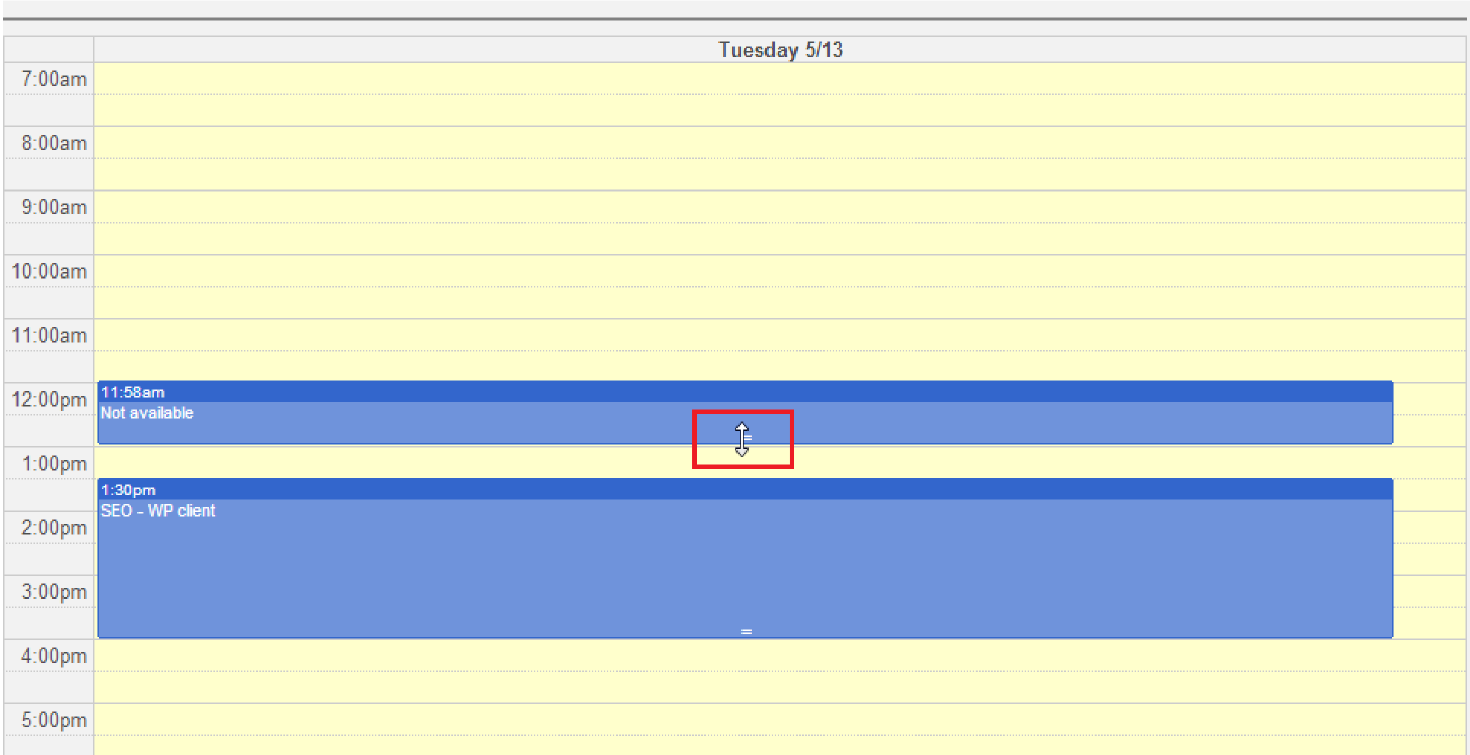
Quick Add Absence

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.

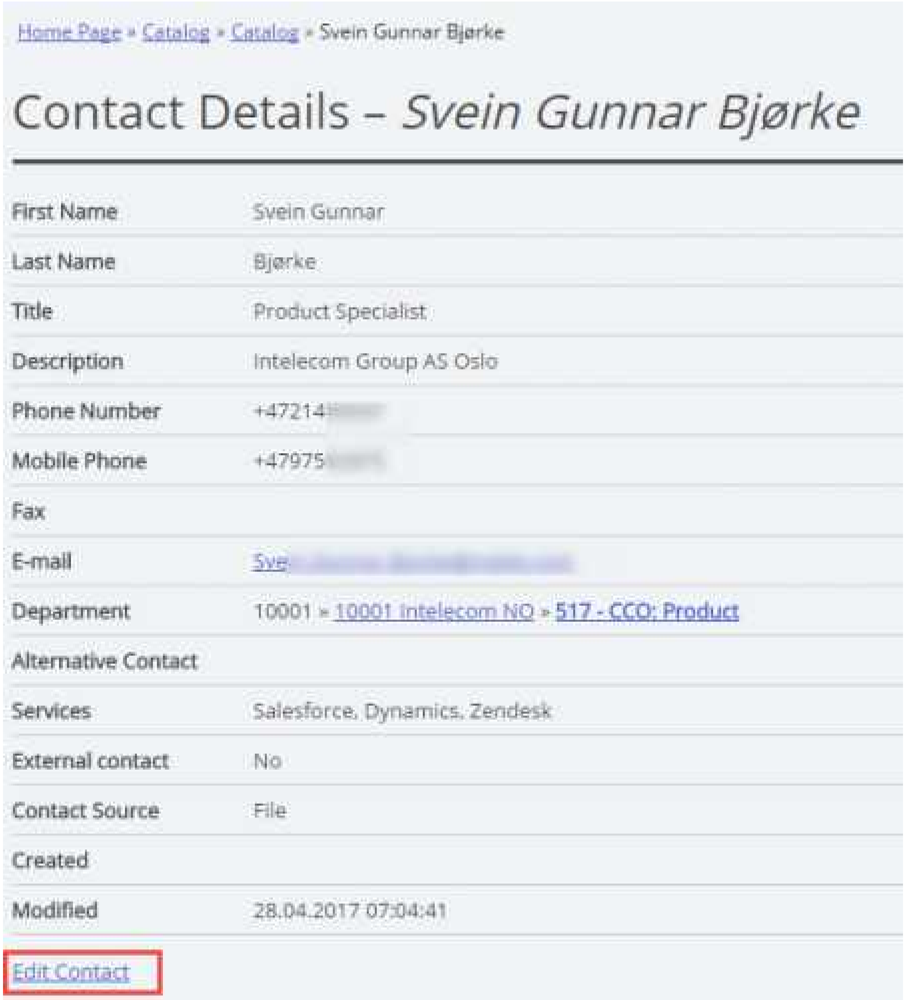


Modifying the calendar and sync with email/calendar systems

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.

Contact Details and Edit Contact

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

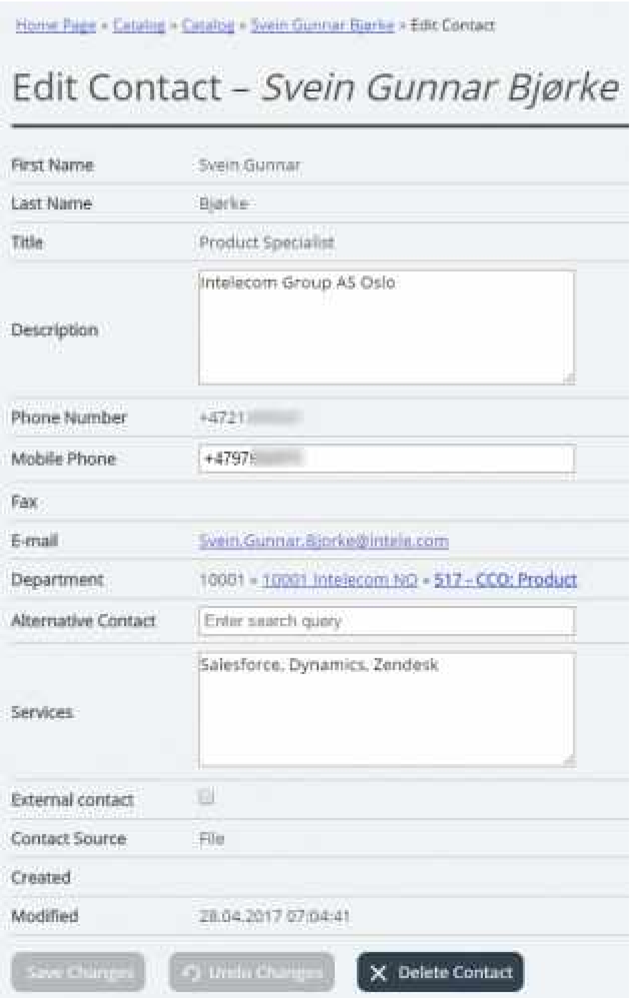
Contact Details – *Svein Gunnar Bjørke*

First Name	Svein Gunnar
Last Name	Bjørke
Title	Product Specialist
Description	Intelecom Group AS Oslo
Phone Number	+47214
Mobile Phone	+47975
Fax	
E-mail	Sve
Department	10001 » 10001 Intelecom 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 contacts information (only possible with sufficient rights).

Solving Customer Interactions



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.

Add a contact

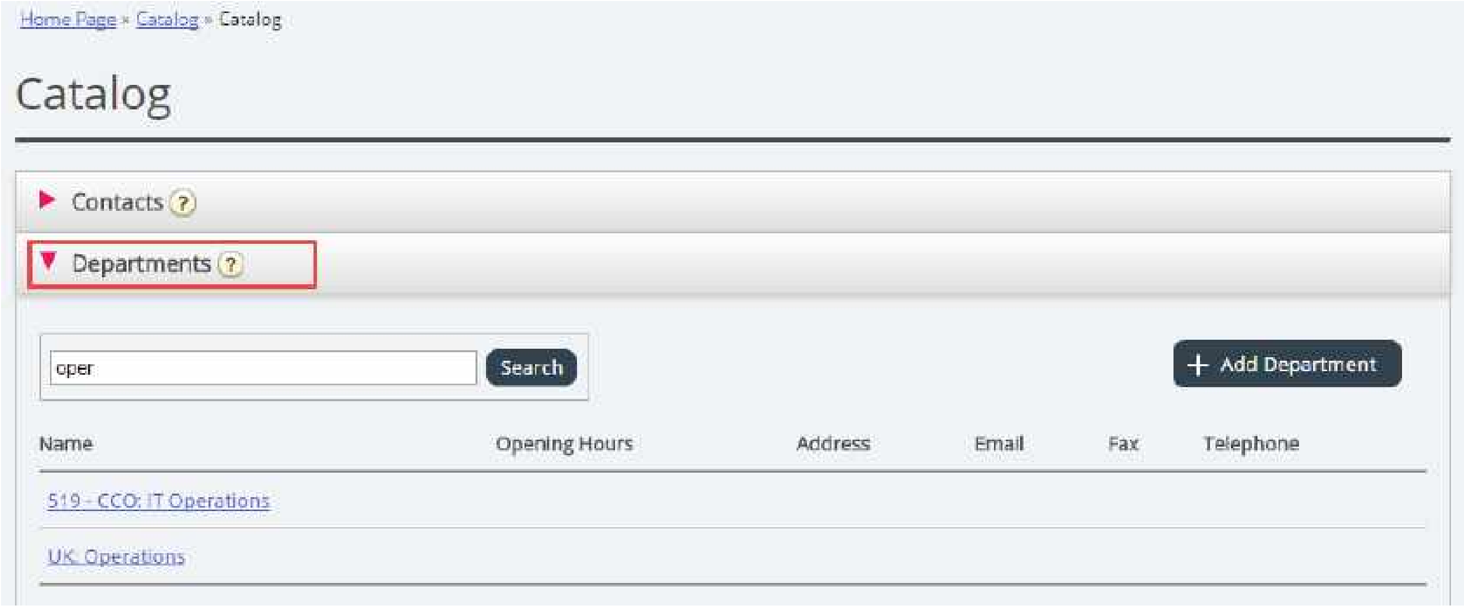
You can add a new contact by clicking the Add contact button.

Fill in the new contacts 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.

Catalog accordion - Departments

Under accordion Departments you can search for existing departments in your catalog.



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.

Department details

Click on a department name (in the Department search result) to see details for the 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 contacts calendar icon to see the contacts calendar, or click on the contacts name to see the contacts 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.

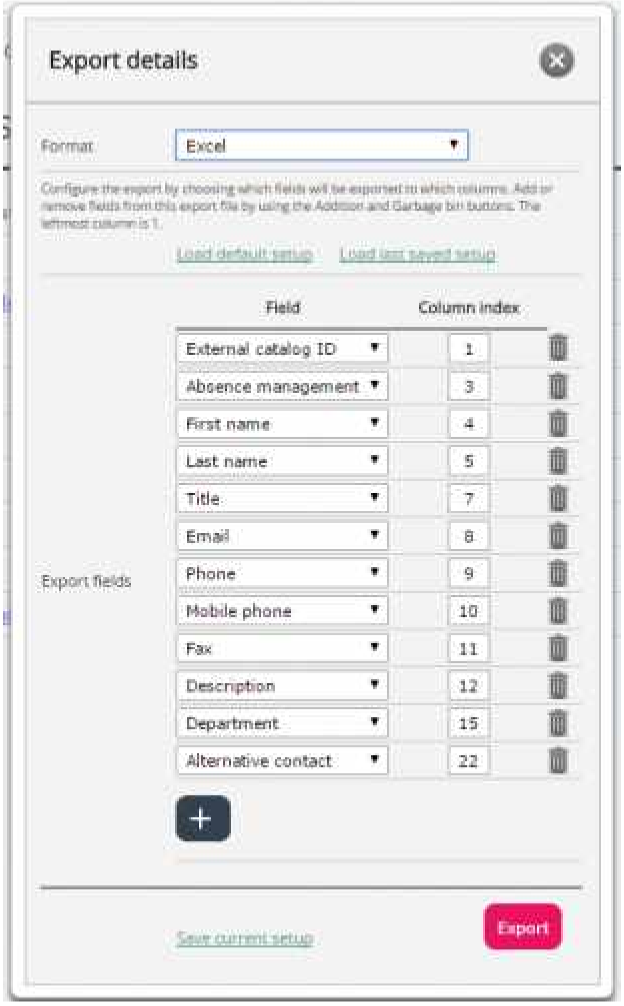
Only Name is required for a Department. If this department should be a sub-department under another department, please select which department this department should be *Under*.

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 solutions 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.

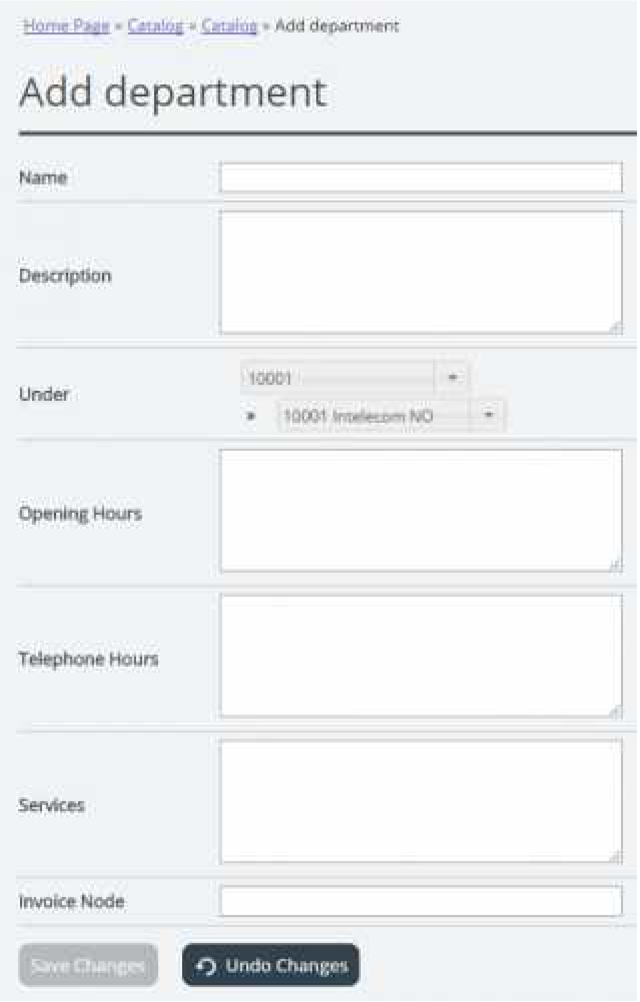
In the Column Index column, you can configure in which order the fields should appear in the export. The value for the first column to appear is 1.

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 solutions default setup or the setup you last saved.

Creating a new department

Click the Add Department button under accordion Departments to add a new department.



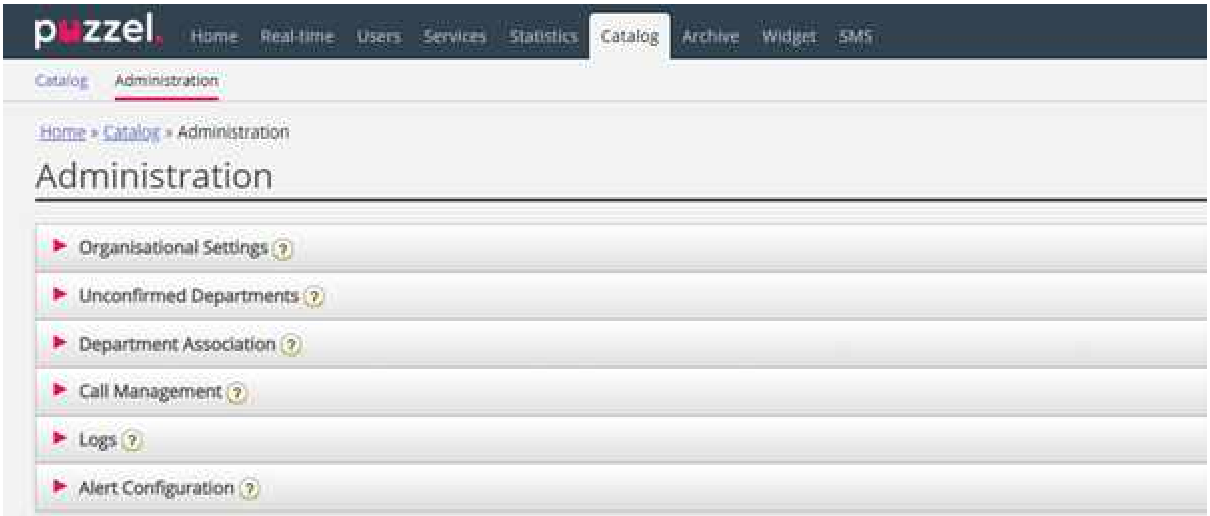
The only mandatory field is Name.

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.

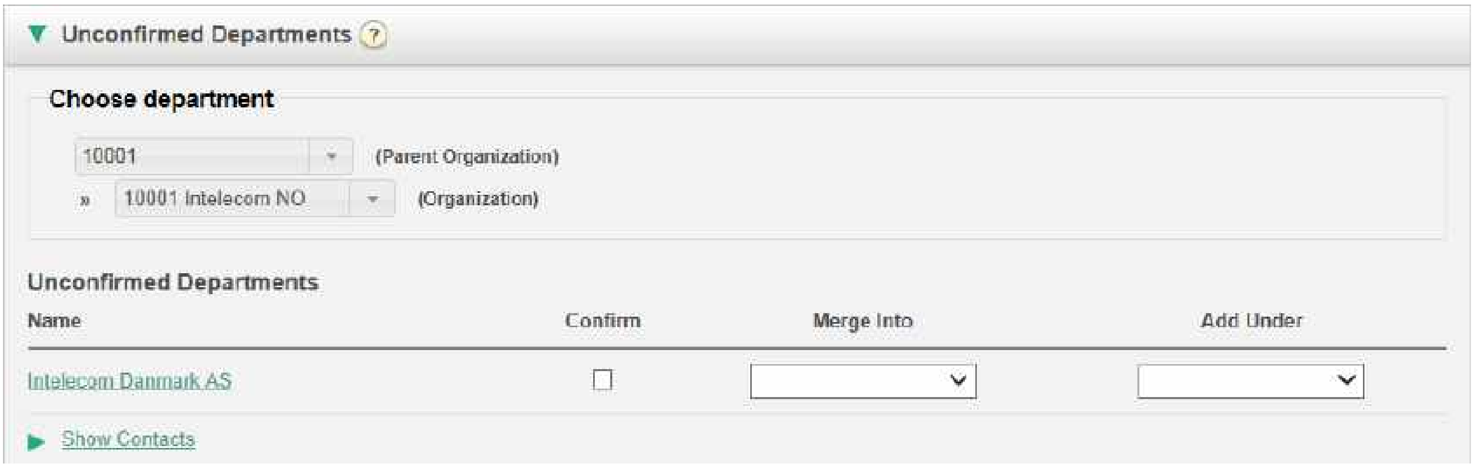
Administration

Under *Catalog - Administration* there are several accordions.



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.



You have 3 options when deciding what to do with a department:

- **Confirm**: Check this box to add the department to the hierarchy.

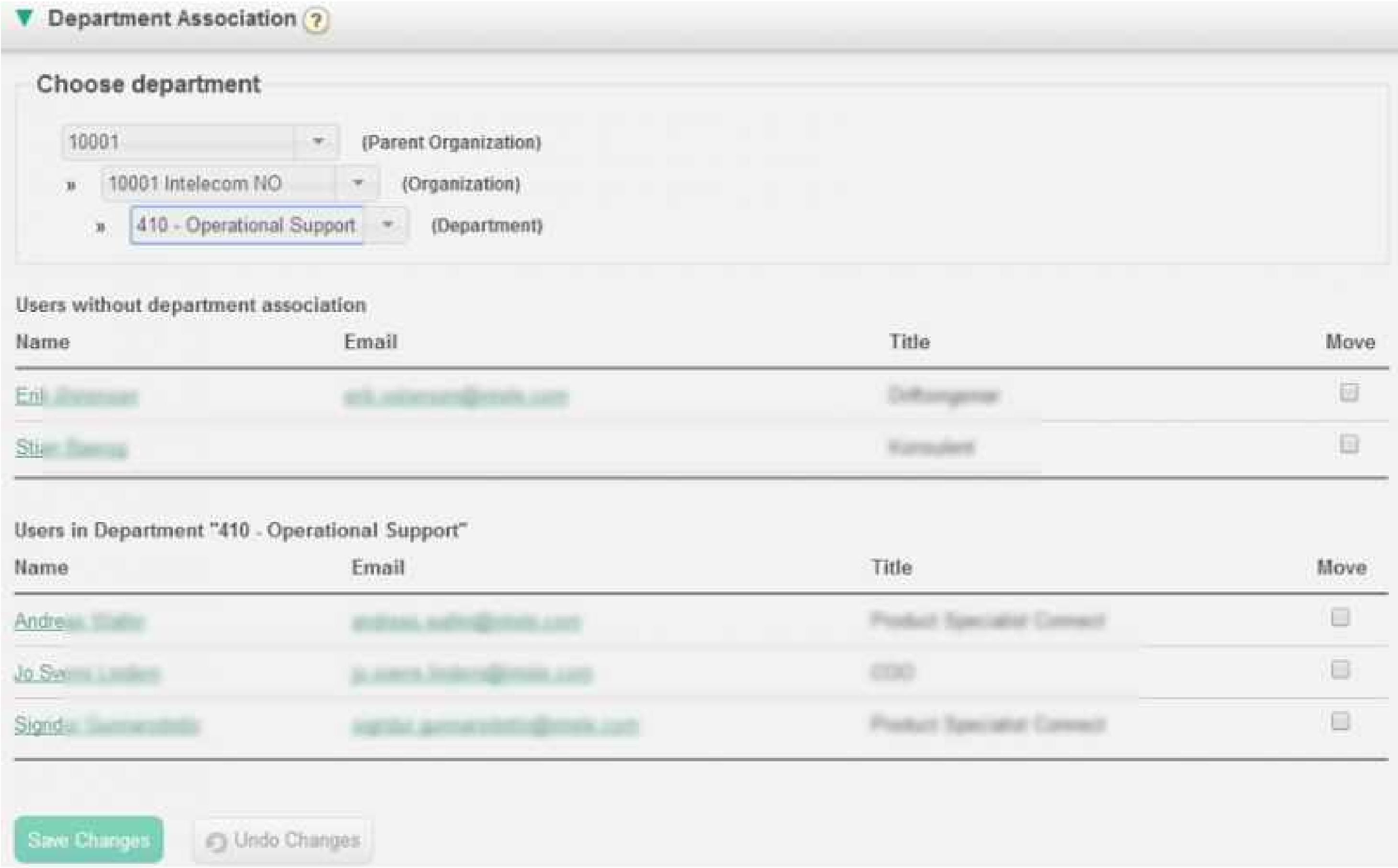
- **Merge into**: It is possible to merge a synced department with an existing department in the Catalog. The original department will then be shown and will contain the contacts of both departments.
- **Add Under**: Here it is possible to select which organisation or department to add the current department under. This allows an organisational hierarchy of synced departments.

Department Association

Department association allows you to manage what departments users belong to. You can move users between departments and associate users that dont belong to a specific department to a 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.*



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 todays 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.

Call Management

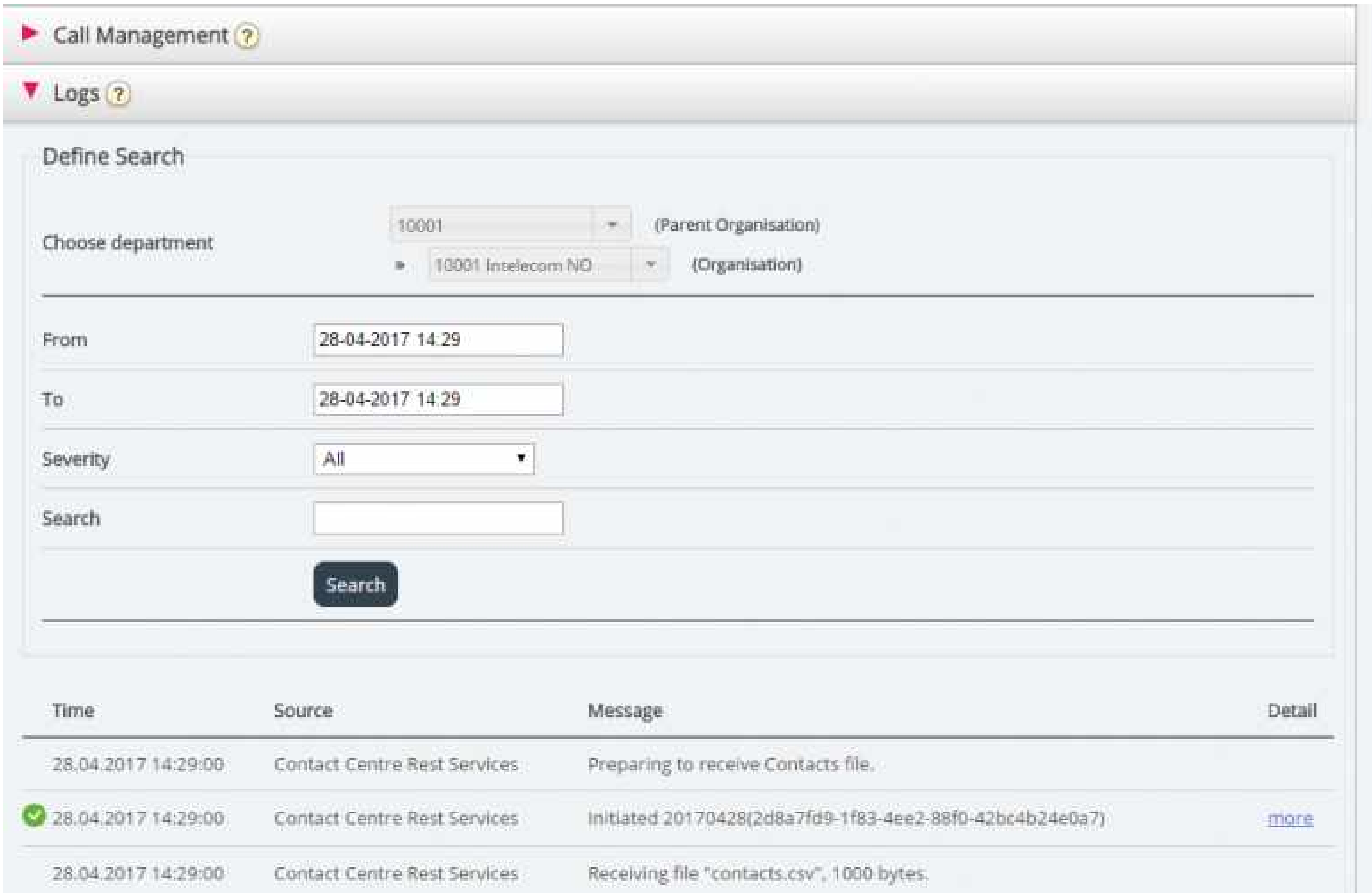
Under Call Management you can enable and disable the Absence management feature for individual contacts. Absence management is mostly used in switchboard solutions where direct calls to contacts, usually employees, are forwarded to the Puzzel solution if not answered, so that the caller can hear spoken absence information for the contact if available.

After choosing Organisation, mark the contacts you would like to activate spoken absence for.

> Note
>
> This feature requires a separate setup in Puzzel and in the local PABX.

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.



Alert Configuration

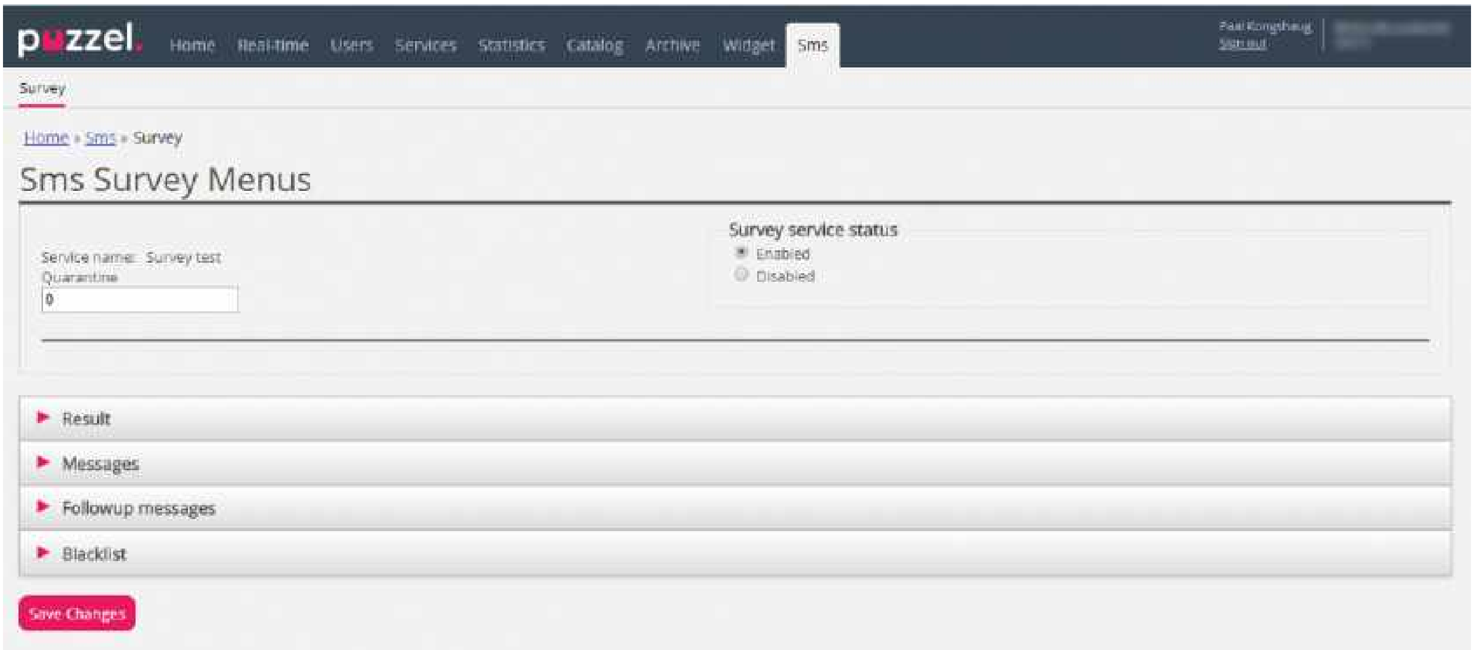
In Alert configuration it is possible to add alerts for contacts and appointments. These alerts are triggered based on when contacts and appointments were last updated. This is useful for administrators that want to be notified if sync of contacts or appointments stops working.

- Alert 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.

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 Administration Portal on the*SMS - SMS Survey* page.

Click on a Survey (you might have several) to open the details page.



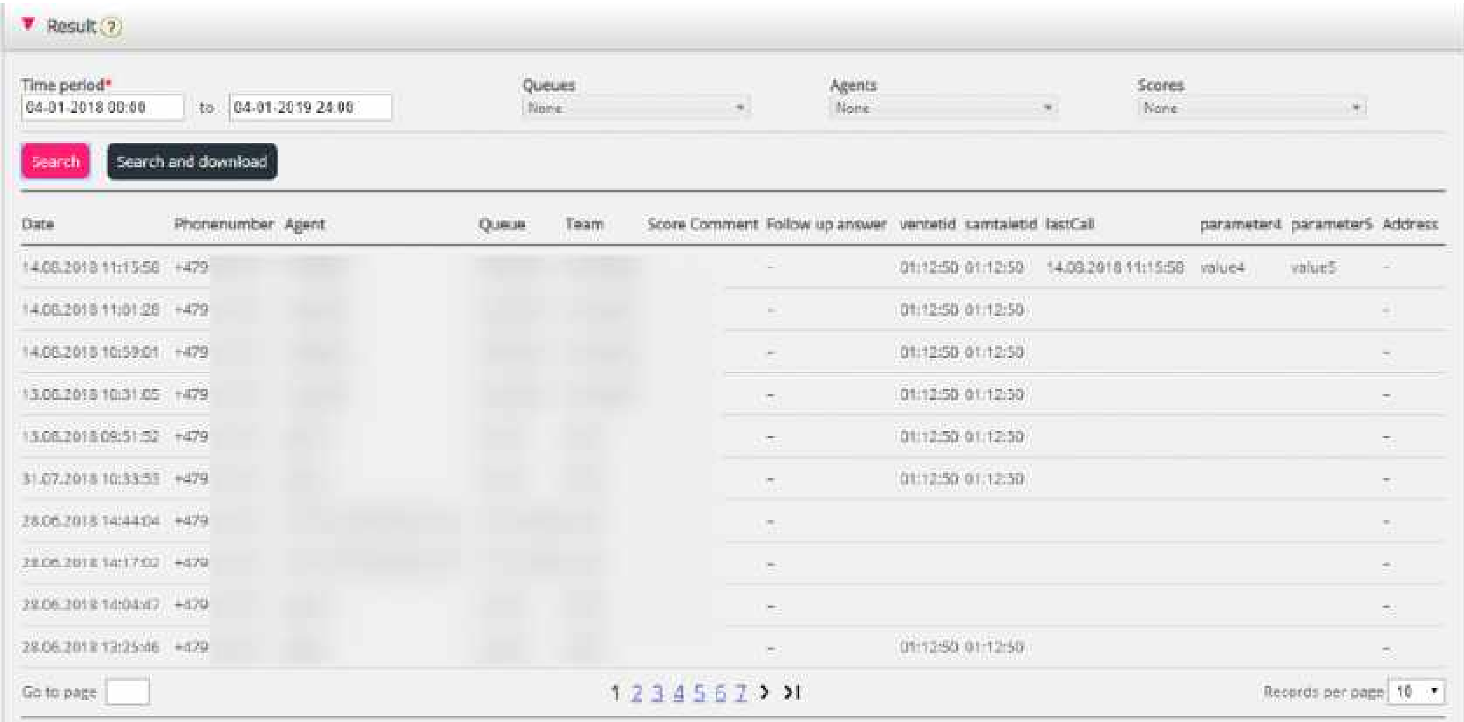
On this page, the SMS Survey can be enabled/disabled, and you can define a quarantine time (minimum days between each time we send an SMS Survey to a mobile number, in case the caller calls the Puzzel customer several times during a week.)

SMS Survey vs SMS Web Survey

- A standard SMS Survey sends an SMS to the end-customer (after call ends), 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 ends), 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.

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 an XLSX file.



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 four 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/usergroup and agent so far), Archive (score and comment per caller), Statistics (SMS/Chat Survey score per queue) and in Raw data.

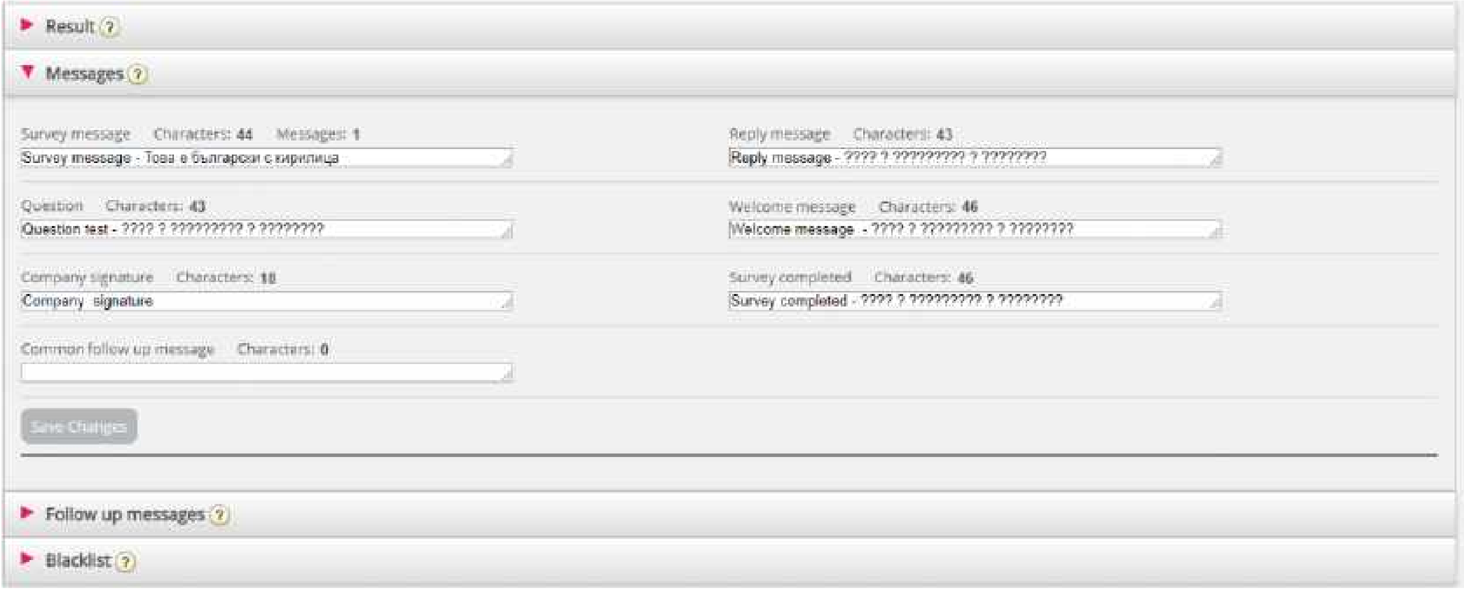
Messages

For standard SMS Survey:

Messages

- **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.

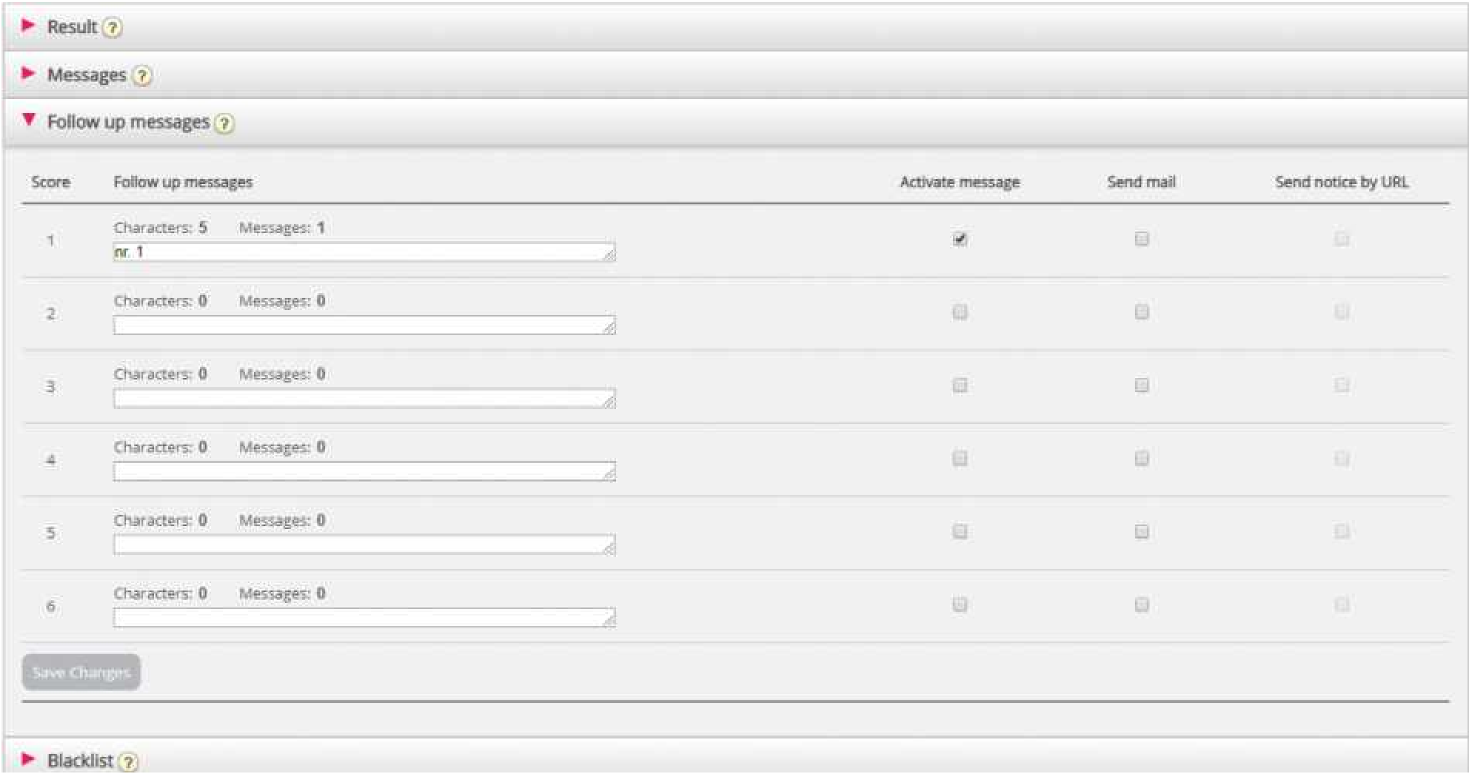
For SMS Web Survey there are some extra messages to be defined (which will be shown on the mobile web page):



- **Question**: Here you ask the user to enter their 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 xxxx or by email support@company.comif you have questions.
- **Survey already completed**: Message displayed on the mobile web page if the 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, or you can define a Common follow-up message that will be shown independent of the score given by the end user.

Follow-up messages

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 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.

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.

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 services existing deny list.

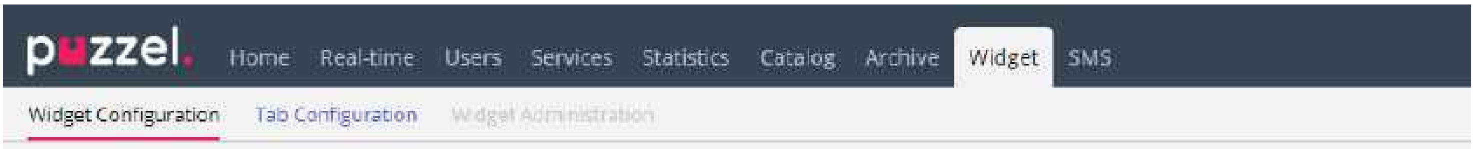
SMS Survey uses the generic SMS Keyword NOSURVEY and score -1 to unsubscribe. If you want to inform about the SMS Survey unsubscribe option, you must write about it in the SMS Survey message itself, e.g. Please tell us how you experienced our customer service by answering with a number between 1 and 6, where 6 is the best. If you dont 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.

Widgets

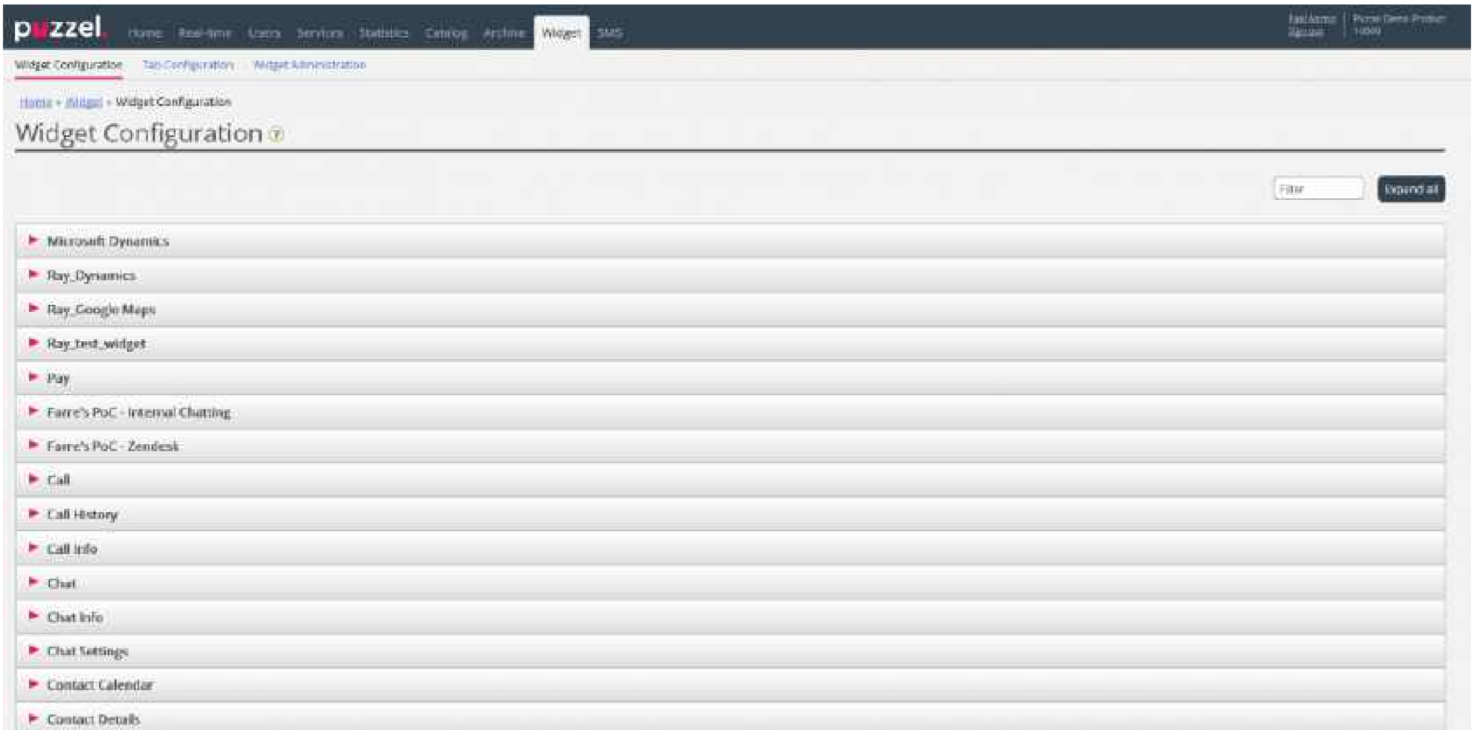
The widget page provides an overview of, and configuration options for, **Tabs** and **Widgets** to be used in the new Agent Application (https://agent.puzzel.com).



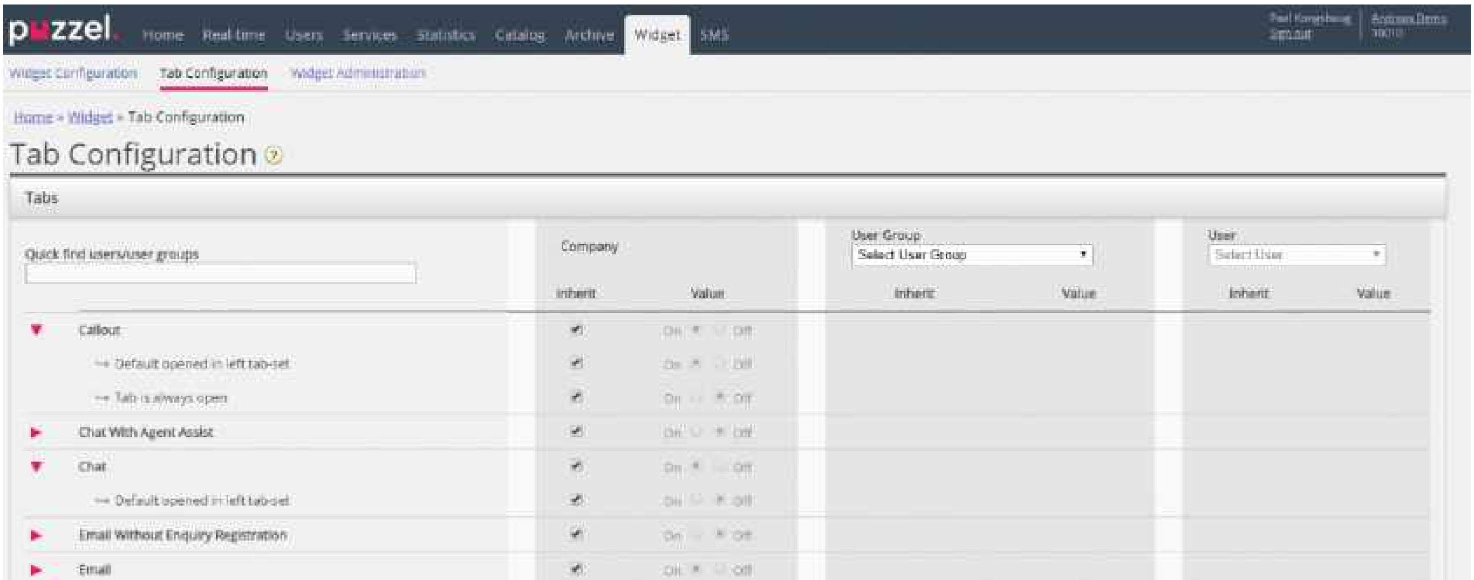
The widget API documentation can be found here:

https://help.puzzel.com/api-documentation/widget-api-lib

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.

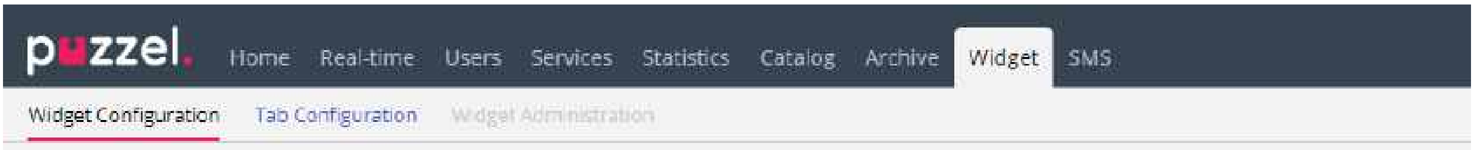
Tab System

The newest addition to our solution is a set of very flexible mechanisms for defining new Tabs in the new Agent Applications and including different widgets in them Core and Custom. This is handled by providing **Tab Configuration**, **Widget Administration** and **Widget Configuration** capabilities in the Admin tool, as well as exposing a flexible **Widget API**, which allows communication with widgets and retrieving configuration data for a widget.

When starting to use the new agent application there will be a new tab available in the administration portal, called **Widget**. This is where you can manage and configure the above-mentioned sections.

Tab Configuration

The tab configuration mechanism is provided in the following menu:



It is responsible for defining new widgets, which can ultimately be exposed in the new Agent Application. In the new Agent Application, each tab contains a set of widgets, which handle some specific task such as Chat, Email, or Phone.

There are two types of tabs, depending on whether they are customizable or not - these are the Core Tabs, which are not customizable, and the Custom Tabs, which are customizable.

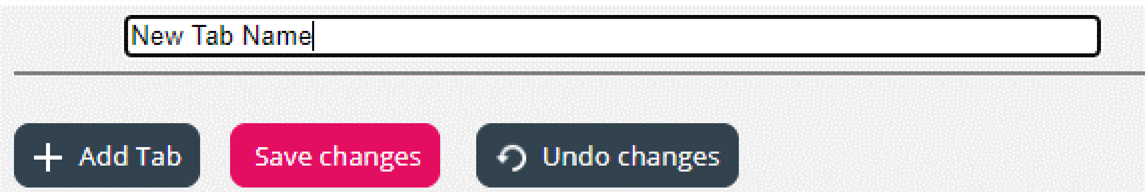
For all customizable tabs, you can:

1. Create a Tab
2. Edit an existing tab

Creating a new tab

To add a new Tab to the list below, simply press the 

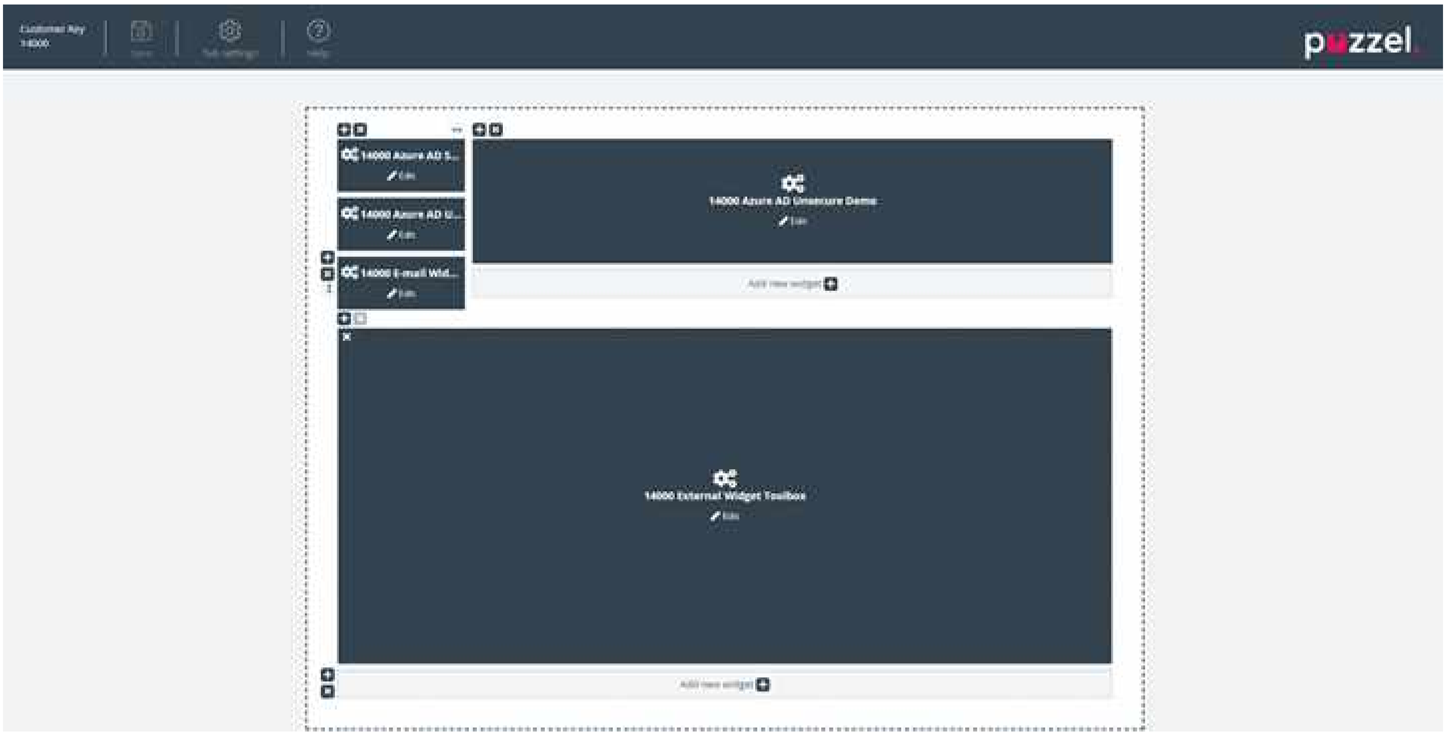
button, located at the bottom of the page.This will add a new empty tab in the list. The next step is to enter a name, associated with this tab.



Once this is done, this tab can be saved via the “Save changes” button demonstrated above. Then, the tab will be rendered as a standard link with text in the tab list of the section. This looks as shown below:

Editing an existing tab

To edit an existing tab, or customize a tab, which was newly added, simply click on its name. This will open the tab and expose the user interface, which will allow you to customize it further. It looks like this:



This layout consists of two sections:

1. The **header**, which contains the “Save” button, along with the “Tab Settings” section and some help information in the “Help” section
2. The **main area**, which contains the main layout, where all widgets are located.

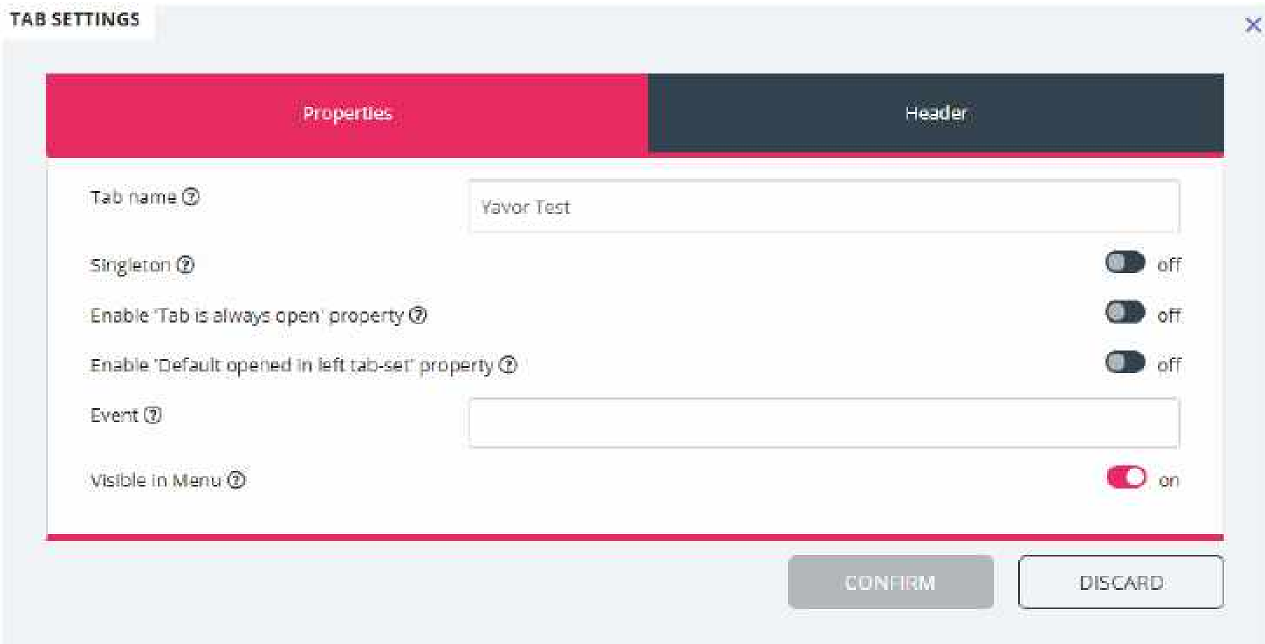
Saving changes

Within the tab header is located a “Save” button, which is used to save the current changes on the layout. By default, when there are no changes, it is disabled. As soon as there are some changes applied, it is enabled and can be clicked.

Tab settings

The Tab Settings icon is located in the header of the tab editor, as show here:

It contains a group of settings, related to the tab as a whole. When clicked, the settings tab is rendered as follows:



The settings which are available on the “Properties” tab are:

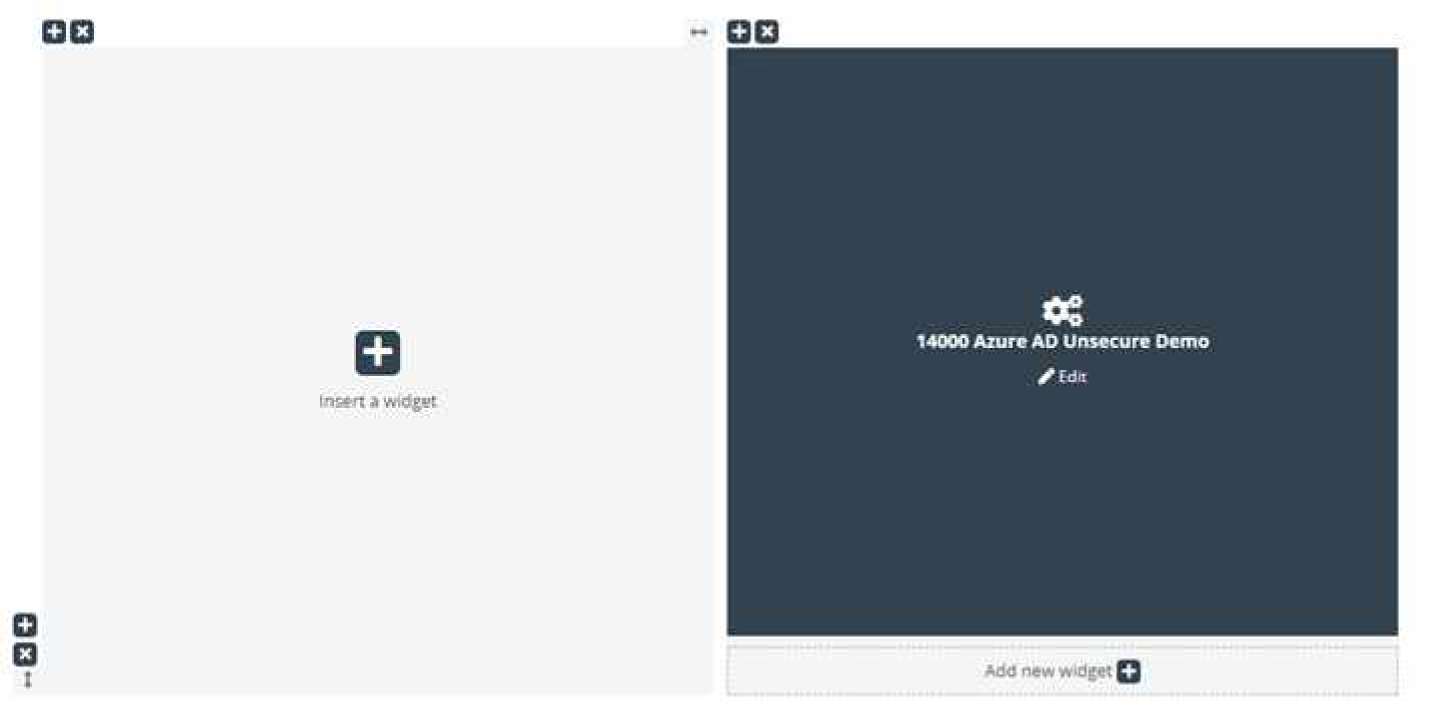
1. Tab Name - specifies the name, which will be used for the tab
2. Singleton - a Boolean value, specifying whether there can only be one instance of the tab
3. Enable 'Tab is always open' property – determines whether the tab stays open at all times. This property, when enabled, becomes visible in the admin section.
4. Enable 'Tab is always open' property – default value – the value associated with the 'Tab is always open' property. This property, when enabled, becomes visible in the admin section.
5. Event - the event, which triggers the tab
6. Visible in Menu - whether or not this tab will be visible/selectable from the menu

For the header section, these are the properties available:

1. Title - The neme/title for the tab
2. Information - Additional information for the tab
3. Icon class - the neme of the class, which will be used to populate the icon
4. Class - The CSS class, which will be used to style the icon - this is a small set of predefined classes
5. Color - Should be hex, rga/rgba color, which will be used for the Tab Header and add tab modal title

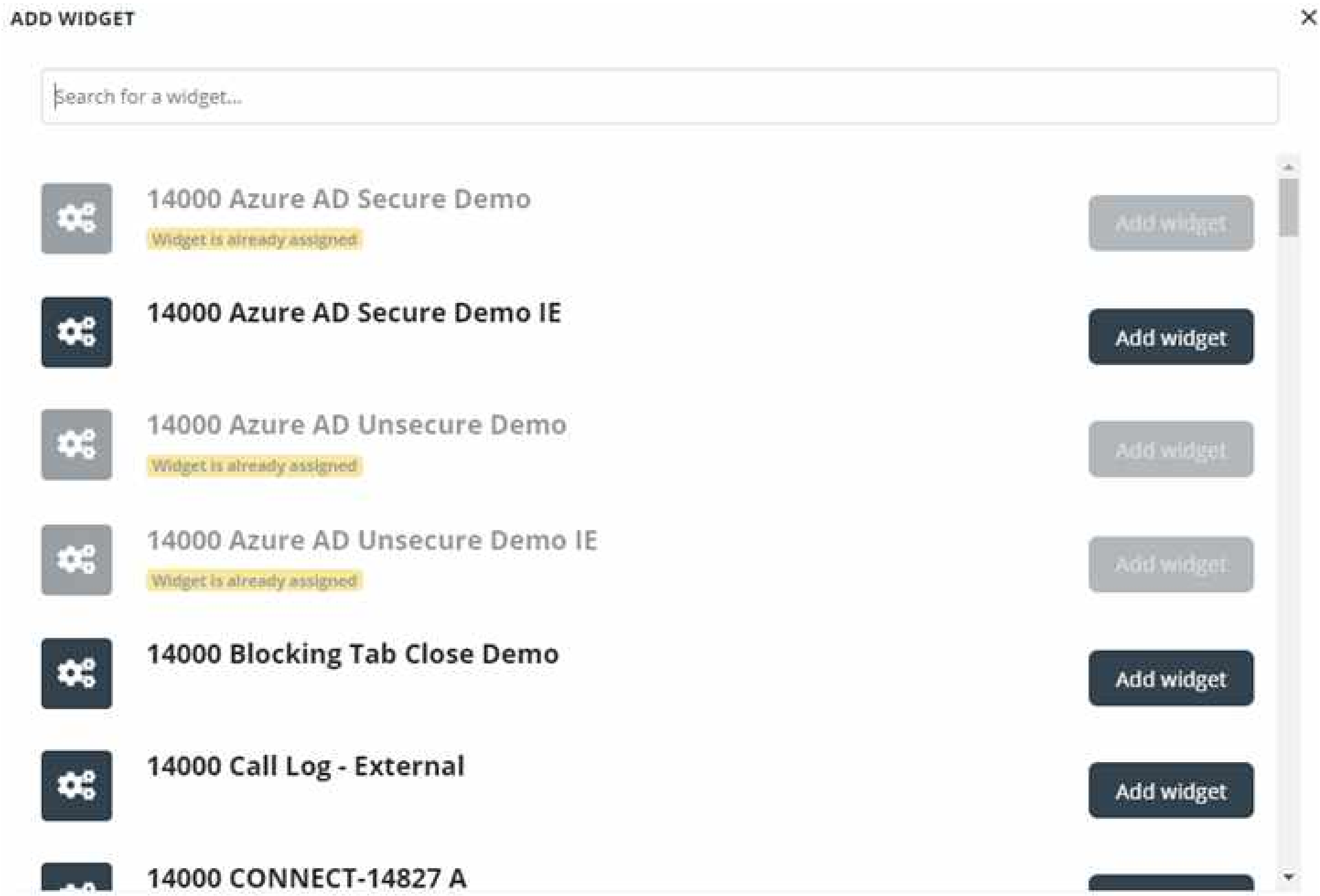
Adding widgets

One can add widgets on the layout only in an existing container. This can be done either in a completely empty container, or a container, which host less than three widgets:

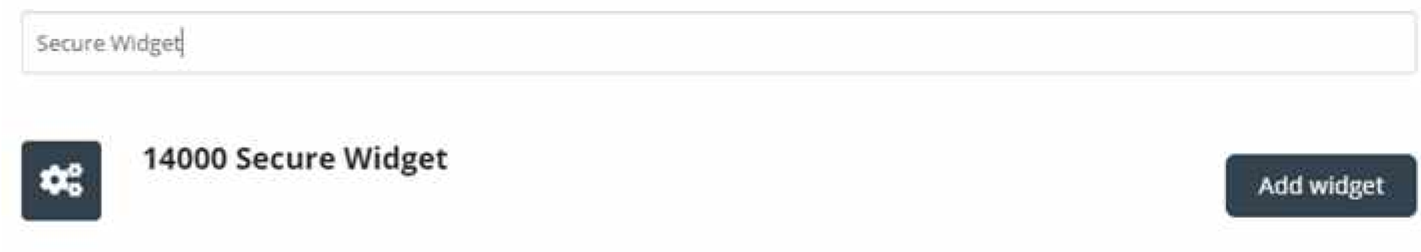


As shown in the screenshot above, one can use either the “Insert a widget” button, or “Add new widget” one.

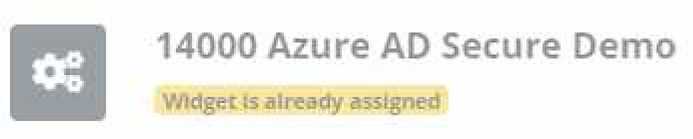
Once one of these buttons are clicked, the menu for adding widgets is show:



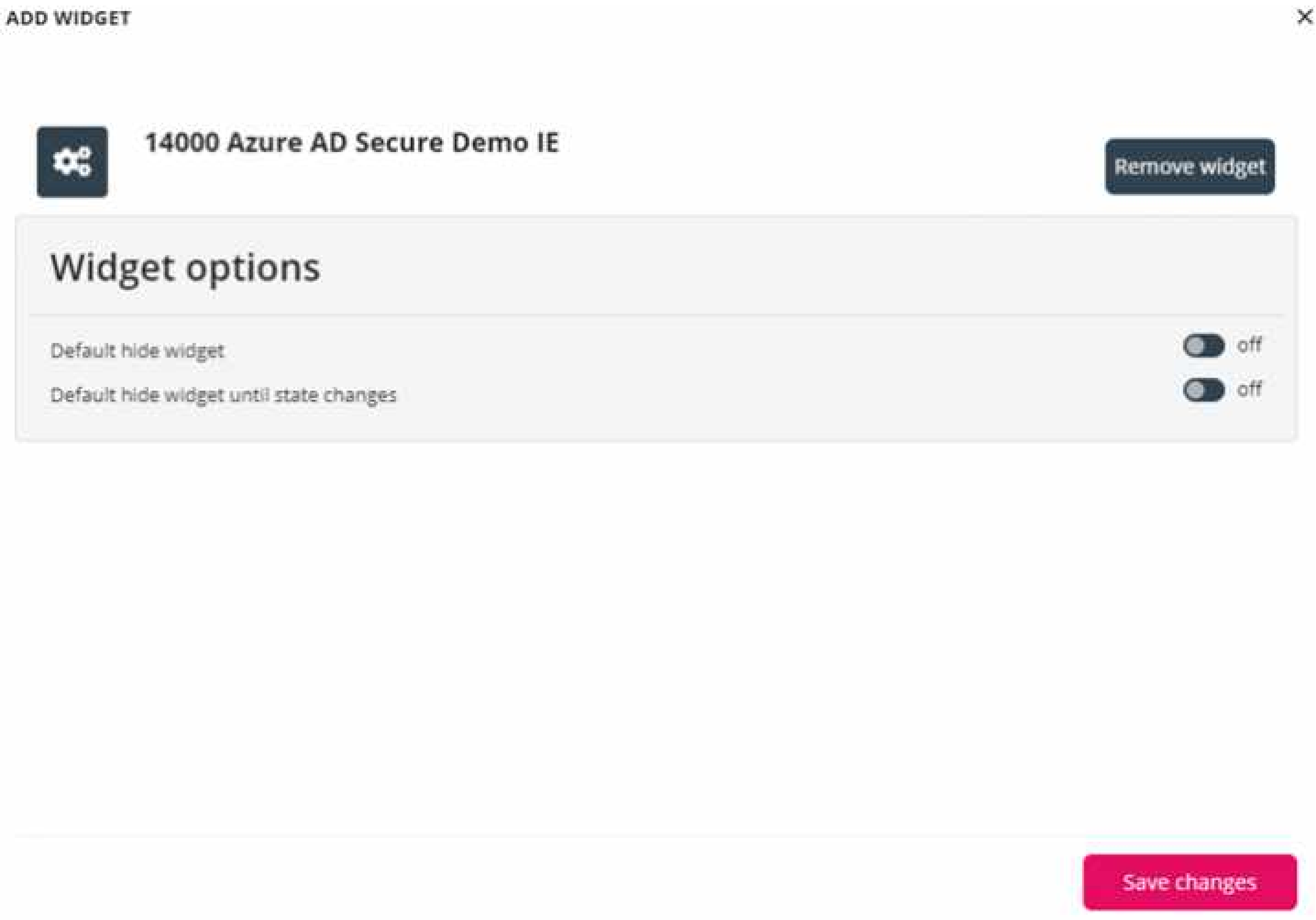
At the top is located the search bar, where one can enter the name of a particular widget, or just a few letters from its name. Based on this, matching names will be displayed under it, as show below:



To add the widget to the layout, one needs to simply click on the "Add widget" button. Please note, that widgets that are already assigned to the layout, cannot be added again. These will be greyed out like this:



Once you click on the “Add widget” button, you are presented with a final step to configure the widget:

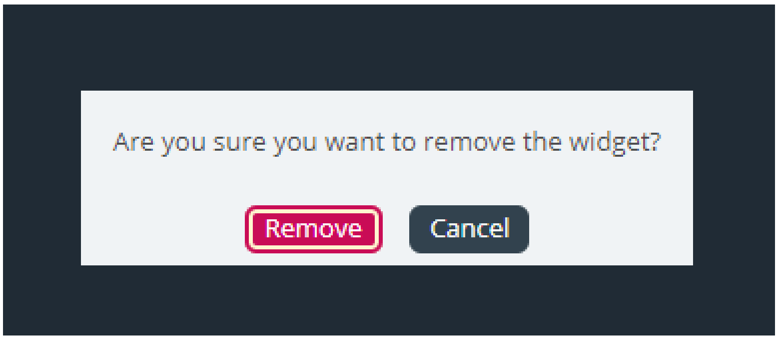


On the screen above, one can set two properties, related to the visibility of the widget on its first load. Also, one can click on the “Remove widget” button, which take one to the list of widgets. Alternatively, one can either close the popup, which discards all changes made so far, or save the changes via the “Save changes” button.

Removing Widgets

Removing widgets from the layout is straightforward. One needs to simply hover over a widget, until the “x” button is shown, on the top left:

If this button is clicked, a warning confirmation is displayed:



If the “Remove” button is clicked, the widget is removed, and the layout cell becomes empty.

Editing a widget

If one wants to edit a widget, this can be done via the “Edit” icon at the centre of each widget, as shown below:

When clicked, the edit dialogue is the same as when adding a new widget. It offers options to edit properties of the widget, as well as add a new widget in its place, close the dialogue or save.

Understanding the tab layout

This section includes more information on the widget layout – the pane, which host all widgets. In a new tab layout, there is only one cell or container where one can place widgets:

In addition to inserting a widget in this cell, one can also add more cells to the layout. This is done via the “+” signs on the bottom left and top left of the container. The bottom “+” sign adds a row and the top one adds a column to the layout.

In the layout above, if one adds one row and then one column to the first row, the layout will change to:

The current limit for the numbers of rows and column is 3, which means that one cannot add more than 3 by 3 rows/columns.

One can delete any layout cell via the “x” button rendered on the top left of the container. If it is greyed out, or disabled, this means that the container cannot be removed – since there is a limit of at least one container for the layout.

Another important aspect of the layout is the resizing. Each column and row can be resized – as long as it has a neighbour cell of course. Resizing is done via hovering over the border between two cells, until the resizing handler appears. Below is demonstrated a resizing handler between two columns:

Alternatively, this is the resizing handler between two rows:

To start resizing, simply click on the resizing handler, and drag it as far left/right/top/bottom as needed. Then simply release it.

When resizing two columns, there are two things to note. First, above each column, there is a number, indicating the relative percentage that this column currently occupies:

Another thing to note is that the resizing is not fully smooth, but rather snapping to steps of 5 percent increments or decrements. This snapping area is denoted by the dotted lines around each cell.

Resizing rows is very similar to resizing cells/columns – simply without the snapping of predefined sizes. This looks as shown below:

Moving the horizontal resize ruler up and down resized the two rows. The new dimensions are noted on the left of each row, in percent.

Widget Administration

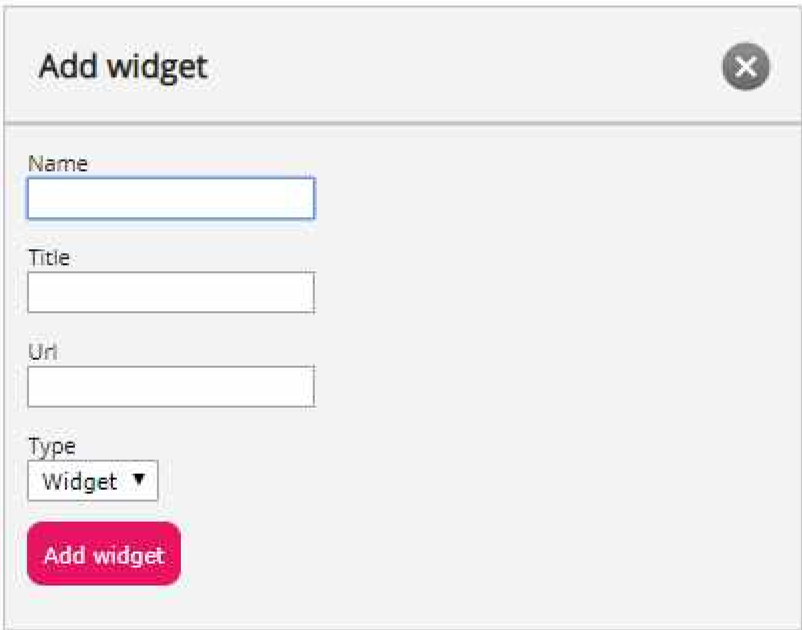
This section of the Administration Portal, allows for two important functions:

1. Enabling or disabling visibility for a specific widget for the current customer
2. Adding or editing widgets properties and widgets

The tab menu looks like this:

Adding a new Widget

To add a new Widget in the list, simply press the Add Widget.



This will prompt you to enter the following fields:

1. **Name** this is the name of the widget
2. **Title** this allows you to enter a title, associated with the widget, which can be a little bit more descriptive

3. **URL** this is the URL, to which the iFrame will point

Once these values are entered, you can press the Add Widget button within the popup and finalize the settings.

Adding properties to a Widget

Once a Widget has been created and added to the list, one can add properties to it. These properties will then be part of the Widget Configuration section for this widget, which can then be set or re-set and ultimately become part of the widget configuration data, which is available for the widget on the client browser. A set widget property looks like this:

To add a new Widget property, simply press on the Add Widget property button. This will trigger a popup form, which contains the following values:

1. **Key** this is the string value, associated with a key for this widget. There are no restrictions on what one can enter, with the main goal being of making this a meaningful key
2. **Default Value** this is the default value for the key. If no other value is set at a later time, the key will have this value
3. **Type** this is the type of the property being added. The available values are:
    1. **String** this is a standard string, which can accept any string of numeric or text values
    2. **Drop down** this presents a dropdown element with options to choose from. Useful for situations, where one needs to present a set of mutually exclusive options
    3. **Password** this is a value, which presents a password field. This is masked

initially, however an administrator can set a different value from the Widget Configuration section later

4. **Boolean** this creates a checkbox field, which similarly to a Boolean field can be checked or unchecked
5. **Integer** this creates a numeric input field, which accepts numbers only

Widget Configuration

This section of the Admin portal exposes a user interface, which allows setting or re-setting of properties, belonging to specific widgets, which have been defined in the Widget Administration section.

Its tab menu looks like this:

Each widget, defined in "Widget Administration" will be available here. Each widget will have the exact same properties, which were defined in the Widget Administration section.

A sample list of widgets may look like this:

Available widget property types

Currently, the properties that can be defined and accessed for each widget are:

1. **String** this is a standard string, which can accept any string of numeric or text values
2. **Drop down** this presents a dropdown element with options to choose from. Useful for situations, where one needs to present a set of mutually exclusive options
3. **Password** this is a value, which presents a password field. This is masked initially, however one can enter any other value in the field and save it

4. **Boolean** this is a checkbox field, which similarly to a Boolean field can be checked or unchecked

5. **Integer** this is a numeric input field, which accepts numbers only

Additionally, there are two other widget properties, which are added at the time of defining the widget. These are:

1. **Widget Title** which gives additional information about the widget

2. **URL** this key points to the Url property for the iFrame. When the widget is loaded in the agent tab, this is where the widget will point to

Editing a widget property

To edit a widget property, follow these steps:

1. Click on the expand collapse symbol, located to the left of a widget name. This loads all properties defined for the current widget.

2. Locate the key, which you need to modify

3. Enter the new value, which you want to associate with the key

4. Click on the Save Changes button

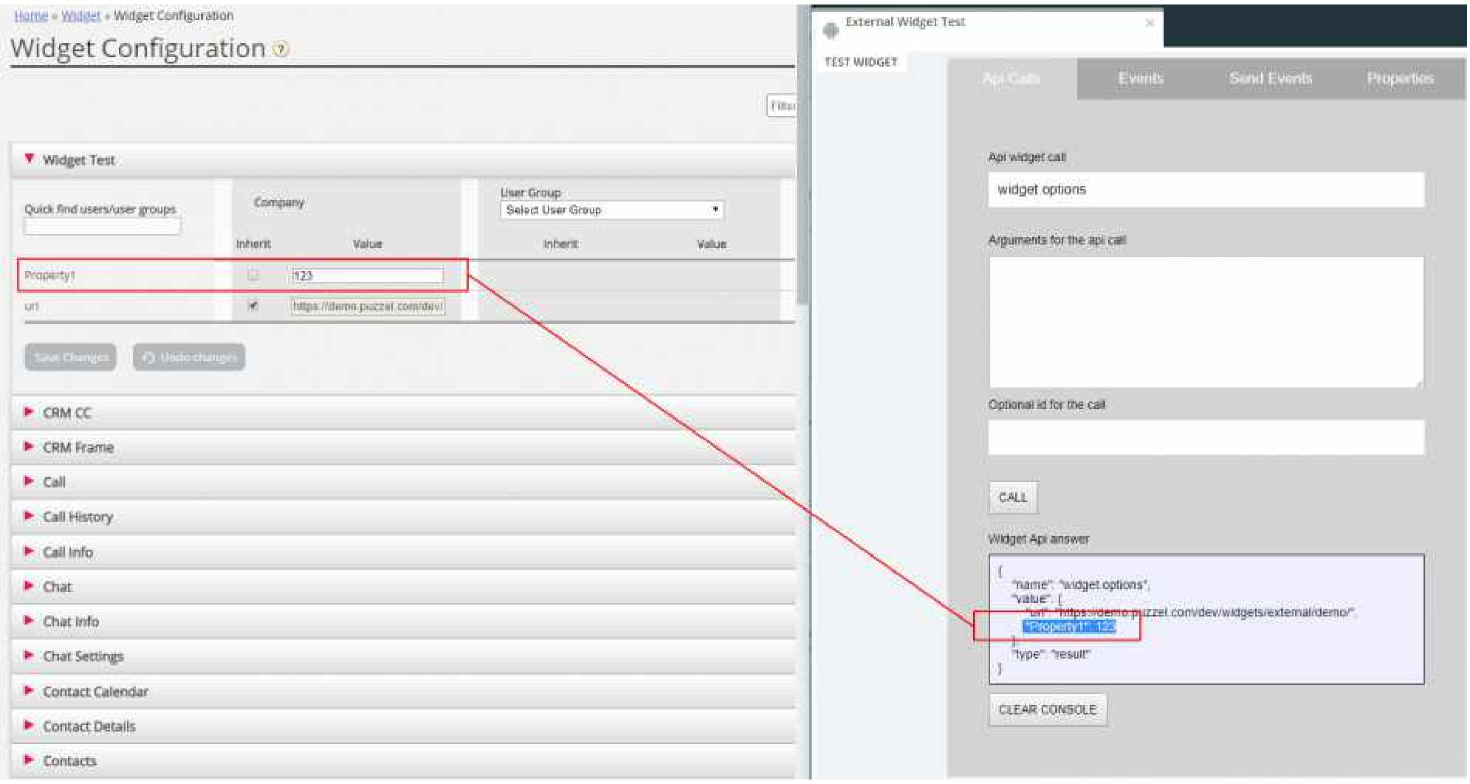
Widget and Widget API

As we established in the sections above, all new elements of our solutions are mutually related the Tab Configuration includes Widgets (Core and Custom). These custom Widgets can be defined in the Widget Administration section. The properties defined can then further be set in the Widget Configuration section. These properties are then passed on the client as client-side widget data.

In addition to this all widgets, Core and Custom, can be made part of a custom layout, or a Tab, which can then be rendered in the new Agent Application.

Further, with the latest release, we are publishing a Widget API, which exposes methods and events for fetching configuration properties on the client, as well as widget to widget communication.

This is demonstrated in the following screenshot, which shows how properties set in the Admin, are made available on the client:



Widget API implementation

The external widgets are generally hosted on a different domain and cannot access the Widget API directly. To bypass the domain barrier the Agent application's core will open a messaging channel with the browser's Messaging API. Essentially, this relies on the *Window.postMessage()* method, to send and receive data.

More information on this is available in the following web page: https://developer.mozilla.org/en-US/docs/Web/API/Window/postMessage

As well as this one: https://developer.mozilla.org/en-US/docs/Web/API/MessagePort/postMessage

puzzel. Solving Customer Interactions

Widget API Overview

Background

The Widget API was designed according with the following goals in mind: - to hide the complexity of the Agent application from the widgets - to present small and consistent interface to the widgets - to maintain a stable interface for the widgets

Overview

The Widget API is split in two major subsystems: the event system and the interfaces. The events system is used to broadcast various messages from the services to the widgets and for widget-to-widget communication. The interfaces are a facade to the services and the core functionality.

Widget messaging

As mentioned previously, the external widgets are generally hosted on a different domain and cannot access the Widget API directly. To bypass the domain barrier the Agent application's core will open a messaging channel with the browser's Messaging API.

The code below demonstrates one way to subscribe to and handle messages from the API:

```
const origin = 'the origin of the agent application';
let port;
window.addEventListener('message', message => {     // Make sure that the
channel comes from the correct source:     if (message.origin !== origin)
return;
    // Setup the communication channel:
    if (!port) {
        port = message.ports[0];
        port.onmessage = receiver;
    }
});
function receiver(message) {
    //code here}
```

The payload of the messages is contained in*message.data*. The core will add a *message.data.type*property to all messages too.

Requests to the Widget API can only be send trough the provided port:

```
port.postMessage(message);
```

Interfaces

To **get a property** or to **call a method** of the Widget API the *{call, args}* message format should be used, where *call* is the path to the method (or property) in the API.

In case of a method call, *args* is an array of all required arguments for the method call. Example:

```
port.postMessage({
    call: 'tab.setTitle',
    args: ['new title'] });
```

If the method returns a result, it will be sent to the external widget by the *port.onmessage* handler in the format*{name, value, type}*, where *name* is the name of the requested property or method,*value* is the value of the property or the result of the call, and *type* will be the string 'result'.

Example response to a *getOption* call:

```
{
 name: 'widget.getOption',
 value: 'https://demo.puzzel.com/dev/widgets/external/demo/', type: 'result'
}
```

Note that, due to the way the Messaging API works, the payload of the message is in the *message.data* property.

If the called method doesn't return a result, no message will be sent by the core. If the called method returns a promise the message will be sent when the promise is resolved or rejected. In case the promise is resolved a standard result message will be sent by the core, where *value* will contain the value of the promise. In case the promise is rejected an 'error' message will be sent:

```
{
 name: 'widget.setOption',
 value: 'Unexpected end of JSON input',
 type: 'error???????}
```

If matching a call to a result is required, the optional *id* could be added to the request. It will be returned back:

```
{
    call: 'tab.getOption',
    args: ['option name'],
    id: '0123456789' }
```

Result:

```
{
 name: 'tab.getOption',
 value: 'option value',
 id: '0123456789'}
```

The widget can also **observe a property** for changes by sending a *{watch}* message. The *watch* field should hold the path to the property in the Widget API.

If the value of that property changes, the core will send a *{name, old, new, type}* message, where *name* will be the same property path, *old* will be the value of that property before the change, *new* after the change, and *type that will be the string* '*changed*'*.*

Events

The external widgets can **subscribe to events** by sending a *{subcribe, options: {once, address}}* message to the core. The *subscribe* field should contain the event's name. The whole *options* field is optional as are its properties: the boolean *once* and the *address* string. The address has the same meaning as in the *ExtendedEventAggregator*'s methods. The *once* set means that the *subscribeOnce* method will be used, i.e. the external widget will receive only a single event before the subscription terminates itself.

The events will be received with a *{name, value, type}* message, where *name* will be the name of the event, *value* is the payload, and *type* will be 'event'.

```
{
 name: 'userStatusChanged',
 value: 'System',
 type: 'event'}
```

The complete API reference will be made available [here]

