

## Puzzel Module Description

The Puzzel Module Description is a catalog of modules of Puzzel products and services that a customer can choose from, to create a solution that works for them. Careful consideration has been made to provide adequate details that will help to create value to our customers.

### Note

The functionality of a module may vary for each customer, depending on what products and features have been bought and how the full solution is put together. This document is the generic 'baseline' reference, and is not interchangeable with the document your company has received.

You can now download the entire module description here:

[Puzzel Module Description full pdf-English.pdf](#)

## Modules

A module is a clearly identifiable functionality of Puzzel products or services which can be bundled to create a solution that is perfect for our customers. We have classified the modules into six broad categories as listed below:

- [Channels](#)
- [Additional features](#)
- [Additional modules](#)
- [Integrations](#)
- [Numbers and connectivity](#)
- [Training and Consultancy](#)
- [Services, Training and Consultancy, Puzzel Support](#)

## Channels

Puzzel allows agents to interact with your customers from the platform or environment they are in. Our fully integrated Omni-Channel solution provides a unified brand experience so that customer can switch between multiple channels yet experience quality of service. This gives your agents the opportunity to serve your customers in a variety of ways that are convenient and effective.

Module description for each channel listed below can be found by clicking on it:

- [Omni-Channel routing](#)
- [Voice](#)
- [Web chat](#)
- [Email](#)
- [Social Media](#)
- [Whatsapp](#)
- [SMS](#)

## Omni-Channel routing

Puzzel's cloud-based contact centre solution is a highly flexible and scalable, a truly omni-channel experience, that manages Voice, Web Chat, Email, Social Media, Whatsapp and SMS interactions, all within the same application. All interactions regardless of the channel it is initiated from, will be routed through our skill based engine, so that the customer interaction is always handled by the best qualified agent.

### Queue

Agents can respond to requests from different queues. Each channel can have one or more queues all blended into the Omni Channel experience by Puzzel. When a request arrives in the queue, the queue module distributes the request to the agent on a longest available/best qualified basis. If no agent is available, the customer is placed in a queue. Once an agent becomes available, the queue module connects the agent to the caller with the longest relative waiting time.

Each queue has a target SLA, and each request an SLA score which indicates its priority in the queue as a function of its wait time relative to its queue's SLA. A queue consists of a media type, i.e Voice (telephone), and a skill, i.e. Sales or Support. Agents are assigned to queues based on what skill levels 1-9 are set in their profiles, i.e. an agent with Support skill of 9 will be available on all Support queues as a highly skilled agent.

If no agents are available when the request enters the queue, it will by default be answered once it has the highest SLA score in the queue by the first agent to become available. If several agents are ready and awaiting requests, calls are distributed on a first-in-first-out (FIFO) basis to the best (highest skilled) available agent, or – if all available agents are equally skilled – in order of what agents have been waiting the longest.

One major advantage of Puzzel platform queues is that they remove the requirement for 'stand-by lines' in the customer's PBX system. Moreover, customers waiting in a Puzzel queue can be matched with an agent at any location.

## Voice

Voice channel enables agents to receive calls in Puzzel. Calls can be queued and distributed to agents with enquiries from other channels. All requests to Puzzel solutions are as default intelligently routed to agents on a first available, best-skilled basis.

Puzzel Voice provides agents with all the tools they need to handle telephone enquiries effectively. Our highly intuitive agent interface makes inbound and outbound calling simple, while skills-based routing ensures customers receive the best possible service every time. Agents can also transfer calls or make consult calls to other agents before transferring.

The Agent application is also equipped with a softphone facility that enables agents to answer calls directly from their computer, tablet or mobile device, removing the need for landlines and clunky infrastructure.

Puzzel Voice is a comprehensive tool kit that enhances the Contact Centre management by providing audio management to the managers in the form of voice recording and silent monitoring. With these enhanced capabilities, managers can record and listen to agent calls, track compliance, identify skills gaps and improve service quality.

Agents can have multiple profiles available to them to log on with, determining what queues they are logging on to.

To know more about Voice feature, read the [description](#) here.

**For more details on Voice channel, download the product sheet here:**

[Voice Product Sheet.pdf](#)

## Area Routing

Area based routing directs callers automatically to their local, or nearest, office. This can be done based on the caller's number, by postal code routing, or by mobile phone positioning (only available in Norway).

When using the caller's number, Puzzel redirects the caller to a location based on where their number is registered. The routing happens automatically, with the inbound call redirecting directly to the nearest location within the organisation. Some disadvantages to this method exist, such as when the caller is not calling from home, or when their number is not correctly categorised, etc.

Routing based on postal code is done through the IVR, with callers asked to enter a postal code which is in turn used to place them in the correct queue. The benefit of this method is that all calls, including those from mobile phones, are routed correctly. Organisations using area routing based on the caller's number may want to route mobile phone calls to a postal code routing to identify where the mobile phone caller lives, as opposed to where they are located at the time of the call.

Finally, mobile positioning services are only available in Norway, and only for callers with subscriptions on certain specific operators. For those cases where it is available, the Puzzel platform can route calls from mobile phones to the nearest office or location based on the physical location of the caller at the time of the call. For this to work, active consent must be obtained from the caller before the location is found, meaning that the caller will have to confirm that they agree to be positioned by pressing a given key. Mobile positioning has a transaction cost for each obtained position.

## Special Routing

There are three different special routing modules:

- Input routing
- VIP-routing
- Load sharing

Input routing is an advanced feature to the standard IVR menu. Callers are asked to enter an input value, such as a customer number, account number, product number, etc. The IVR reads this value back to the caller and requests confirmation, commonly with a hash (#).

With input routing, the organisation decides:

- How the call should be routed based on the values entered
- If the value entered should appear on the agent's screen
- What will happen if the caller does not enter anything
- What will happen if the callers enter an invalid selection

Input routing can also reference a VIP list, such as client or office numbers, where callers entering the 'correct' input gets special VIP treatment (for example a direct line to a specific person in the organisation).

This feature should not be confused for VIP routing, which is based on the caller's number (sometimes referred to as the A-number). Important customers with known numbers can be given special treatment by having their numbers on a list that passes their calls to dedicated agents, and/or places them first in the queue. This requires a list of VIP customer phone numbers to be created.

This module can also be used as a 'blacklist', for example for callers that the company does not wish to prioritise, or would otherwise want to handle separately from the primary call flow.

Finally, load sharing enables Puzzel to distribute callers between multiple sites, queues, or agent groups based on predefined percentages. This can be useful e.g. for certain functions or departments that are spread across several branches or offices, where the company wants some percentage of calls to be routed to one office and the remaining calls to be routed to another office.

## Web Chat

Puzzel web chat is an easy to set up solution, where customers are simply required to add a code snippet to their webpages, they wish the chat service to appear. All web chat settings are configurable within the Admin Portal, including positioning, languages and themes. This 'low-code' approach enables contact centres to be more agile and proactive by removing the need for costly and often time-consuming IT support.

Chat allows agents to respond to web chat enquiries through the Agent Application. Agents can respond to up to eight chat enquiries simultaneously, configurable in the Administration Portal.

One of the most exciting features is the ability to create parent and child configurations, allowing companies to create unique web chats for different sections of their website.

Chat enables the following functionality:

- Send predefined messages and emoticons
- Page tracker
- Survey
- Check spelling
- Transfer the chat to another agent or a queue
- Invite colleagues to join in on the chat
- Send hidden messages to another agent

The chat session can be saved in the media archive for future review, and the dialogue can be sent by e-mail to the customer.

Organisations with Chat processed through the Agent Application can enable the Media Archive in Admin portal, where users can see a graphical view of the chat history. This displays how long the chatter waited in the queue, which agents responded to the chat, and how long the conversation carried on for. Users can look up chats based on criteria such as agent name, time of the chat, or the queue the chat came in through.

Puzzel also integrates the chat bot solution through a hub that consists of several ready-built connectors for some popular bot frameworks in addition to an API that allows customers to connect generic bot frameworks. One of the main features of the Bot Gateway is the ability to seamlessly handover chatbot conversations to human agents. Chatbots are made accessible through the standard chat interface from Puzzel or using the chat API. For more details on Bot gateway read the module description [here](#).

For more information on Puzzel chat solutions, read: [Puzzel Chat Configuration](#).

**For more details on Web chat solution, download the product sheet here:**

[Web chat Product Sheet.pdf](#)

## Email

Email in queue enables agents to receive e-mail enquiries through the Agent Application. They are queued and distributed to agents alongside enquiries from other channels. All e-mails, both answered and unanswered, are included in statistical reports as well as in the agent ticker.

Emails in Puzzel case management system automatically converts them into support tickets and assigns a unique case id. This will then be categorised and assigned to the right agent through our clever routing mechanism. For more details please read the module description on [Case Management](#).

Organisations need a connector for the e-mail to work. Puzzel has developed a connector for Exchange mail server. See "Exchange Connector" for information.

## Email Connectors

Puzzel has developed Connector tools for integrating customers' e-mail with our Agent Application. Customers can use these connectors to subscribe to new mail events on mailboxes and public folders. If you are not using Microsoft Exchange or Office 365 for your emails, you must ensure to have a similar connector to the Agent Application, or purchase a consultation on how to integrate with Puzzel.

Puzzel offers different connectors for Exchange Server 2010 and higher, and also for Office 365 email solutions. Furthermore, we have utilised the Office 365 connector functionality in Azure that will help you effortlessly automate the mail flow between Microsoft office 365 and Puzzel mail server. By utilising the connector functionality and defining the triggers and workflow with the aid of Azure logic apps, you will be able to manage your email account in a systematic way.

For more details on each of the email connectors read the following articles:

[Puzzel Exchange Connector](#)

[Puzzel Office 365 Connector](#)

[Puzzel Office 365 Connector in Azure](#)

**Download the product sheet for Email Channel here:**

[Email Product Sheet.pdf](#)



## Social Media

The social media feature allows agents to respond to enquiries from social media sources such as Facebook, Twitter, WhatsApp and Trustpilot in the Agent Application. Social media requests can be queued and distributed to agents alongside enquiries from other channels. Agents can respond to public enquiries and private messages (Like Facebook Messenger), and will respond in the organisation's name. Agents do not need to use their private social media accounts to respond to enquiries. All social media enquiries are included in statistical reports and in the agent ticker.

This module is managed through the Admin Portal, where you can add new social media sources. Agents can then handle social media requests through the social media widget in the Agent Application.

For more details on our social solution, read [Puzzel Social Media articles](#).

**Download the product sheet for Social Media here:**

[Social Product Sheet.pdf](#)

## WhatsApp

WhatsApp is the most common communication channel used by people all around the world. Puzzel has integrated WhatsApp as a communication channel to enhance the customer service strategy which allows agents to respond to incoming messages [commonly known as session messages] as well as send pre approved [by WhatsApp/Facebook] message templates outside the 24 hr customer care window. The 24 hr time frame starts when the customer has reached out to your business through WhatsApp. The agent can then choose to respond to the message by either chatting directly to the customer or sending a message template. The messages sent outside of the 24hr window are charged on message delivery based on the customer's phone number and country code.

### Note

- 1) Note that the 24 hour window resets each time the customer replies to your message.
- 2) The customer care window cannot be initiated by the business by messaging first.
- 3) All messages exchanged with the customer during the 24 hrs window are not charged by WhatsApp.
- 4) Message templates can be used during and after the 24hr customer care window.
- 5) Only message templates can be sent outside the 24hr customer care window.

Puzzel offers three subscription options you can choose from, to suit the requirements of your business. This mainly depends on the volume of messages or interactions you may handle within your enterprise.

1. 10 messages per sec
2. 20 messages per sec
3. 40 messages per sec

More details on WhatsApp template fee rates can be found [here](#).

## SMS

This feature enables agents to respond to SMS enquiries, queued and distributed to them alongside enquiries from other channels. The admin can configure the SMS source within the Admin portal which allows the agents to receive and respond to SMS queries from within the Agent application through the social media widget. Once the interaction has been initiated by the customer, this feature uses Puzzel's conversational platform for subsequent communication, similar to a web chat. However, the user will still receive the response in the form of an SMS.

### Send SMS from Puzzel [SMS Gateway]

Puzzel's SMS Gateway is an interface for sending and receiving text messages over the Internet. This means that your company can integrate SMS solutions with your own systems easily using an SMS Gateway. Puzzel directly integrates with carriers and with several channels for distributing text messages to recipients all over the World.

Puzzel's SMS Gateway enables you to send and receive SMS via different protocols:

- SOAP
- REST / HTTP(S) POST with JSON, XML or form data
- HTTP(S) GET
- SMTP (e-mail)
- SMPP
- TCP Socket / XML

Most of these interfaces allow you to send one or more messages simultaneously with different recipients, content and prices.

Official API documentation for Puzzel SMS Gateway: <https://github.com/PuzzelSolutions/SMS>

**Download product sheet for SMS channel here:**

[SMS Product Sheet.pdf](#)

## **Additional features**

Additional features are discrete functionalities of Puzzel products that can be subscribed to which can add value to your solution. Each of these features can be coupled with others to suit the requirements of your business.

## Puzzel Digital Engagement

Puzzel's Digital Engagement tool provides an effective way of understanding your customer's digital journey and proactively converse with them to provide solutions or direct them to a human agent for an enhanced support. Our Intelligent Chatbot is capable of understanding user intent and start a relevant dynamic conversation with the user to provide a satisfying resolution. With our Proactive Rule Engine, you can also create triggers to engage web visitors with the right offer, at the right time, to boost your sales.

While on the call, chat or social media, customers can share their browser pages and turn the video on for a personalised customer support and seek assistance on a webpage or for filling out forms. These tools will empower your agents to aid your end customers in solving complex queries in a live environment with personalised guidance.

### Note

Puzzel Digital Engagement comes fully integrated with Puzzel Contact Centre solution or can be sold as a stand alone feature.

## Intelligent Chatbot

Puzzel's intelligent chatbot can gauge a user's intent and proactively start a conversation by asking related common questions and dynamically providing a response to it. It can be treated as a first line support for resolving simple mundane queries saving agent's time for resolving more complex issues. If the query needs human intervention it can seamlessly be transferred to a human agent with a full interaction history so that they are up to speed. Intelligent Chatbot comes with a Bot Trainer with an easy to use UI that allows you to create conversational flows and train the bot to understand user intent.

## Live Share

Puzzel's Live Share provides agents a visual engagement capability fully integrated in the Puzzel Agent Application. This empowers the agents to assist their customers in their digital journey through a video call for a more satisfying and empathetic user experience similar to an in-store presence. Furthermore, the customer can share their browser with the agent by using Co-Browsing technology. Sensitive data like user id, password, or credit card details on the web page can be masked from the agent to be in-line with the security compliance regulations.

Whilst seeing the same browser page as the end customer, the agent can highlight areas of interest on the page to help the end customer focus and help them fill web forms, find a product of interest, or in other ways assist the end customer on your website. When the customer moves to another screen it is refreshed at the agent side as well so that the agent can follow the customer through his journey. This facilitates an agent to provide an effective service, first time round.

The co-browsing and video feature can be initiated on a voice call, chat conversation and social channels and require no software downloads at either end. Puzzel provides all services including setup which enables the customers with the right script for their web pages.

## Screen Share

This module provides Co-browsing capability only. The customers can share their browser pages securely with the agent to seek assistance. By using Puzzel's Screen Share capabilities, the agents can effectively provide support and improve customer experience. It helps in building customer loyalty and meet their business metrics.

Co-browsing is seamlessly integrated into Puzzel Agent Application and the agents can use this feature where necessary to assist the customers fill their forms by highlighting areas of interest or guiding them through their purchase. Screen Share requires no software download at either end or complicated setups. Puzzel provides a seamlessly integrated user experience for an unmatched customer service.

Download the product sheet for Puzzel Digital Engagement here:

[Product sheet Digital  
Engagement.pdf](#)

## Customer Interaction

The Basic Agent Assist module makes available to a customer an Agent Application widget that provides contact centre agents with functionality for greater efficiency and faster interaction resolutions. Agent Assist provides help to the human agent during an interaction by, for example, showing a contact card of the recognised customer, displaying historical interactions with the customer including transcripts, surveys and enquiry registrations. The basic Agent Assist is equipped with the following features:

- Importing and managing contact details: The customer details will automatically be retrieved and displayed when the request comes in.
- Interaction history: Lists historical interactions from the customer via phone, chat and emails. Chat content is also made available here.

For more information on basic components of the Agent Assist, you can read this [article](#).

Download the product sheet for Agent Assist here:

[agent-assist.pdf](#)

## Voice Features

### Softphone

Softphone is essentially a software-based phone that mimics the functionalities of a desk phone by presenting a phone interface in the Agent Application, complete with a dial pad and call handling features such as Mute, Hold, and Call Transfer. This feature enables the agents to answer calls in queues from their computer rather than a traditional landline or a mobile phone.

Softphone uses WebRTC technology to transfer the conversation's audio using the agent's Internet browser and Internet connection as a carrier. The audio is handled through a headset and microphone connected to the agent's computer.

Agents can choose between logging on with Softphone or an external phone. Puzzel Softphone is only supported on the Chrome Internet browser, and requires agents to have stable and sufficient Internet access.

**For more details on Softphone, download the product sheet here:**

[Puzzel Softphone.pdf](#)

[EN-Voice.pdf](#)

### IVR

An IVR Menu lets the caller choose which department or person they want to talk to. The menu is customised to each organisation's needs, and comes with two or more options. It is recommended you do not use more than 4-6 options in a menu, so to accommodate further options you may use sub-menus for each main menu option.

The menu can also be used to confirm values entered by the caller. For example, when the caller needs to enter a membership number, the menu module can read the value entered back to the caller and request confirmation from the caller, commonly with a # (hash).

The IVR is setup using the Call flow tool configuration. For more details read [this article](#).

#### Information message in an IVR

This product enables an organisation to leave messages for callers in the IVR. This may be for example welcome messages or announcements. After playing the voice message, the call can be routed to a different part of the IVR, another telephone number, to Puzzel, or it could be ended.

Information messages are often used in combination with the time module. For instance, a welcome message (e.g. "Welcome to the Company help line...") will play during opening hours, while a closing message (e.g. "Our opening hours are Monday to Friday 8-16") can be played during closing hours.

Information messages can be recorded by the organisation and uploaded and managed using the Audio functionality in the Admin Portal of Puzzel Contact Centre solution.

### Callout

Agents can make an outbound call to a phone number, possibly from the catalog or by directly entering the phone number. This feature increases the agent's efficiency as call outs can now be done from the Agent Application itself using the Softphone facility or the phone number used to login.

### Audio Management

Puzzel provides the ability to record, upload, and manage your sound files. You can record files from your phone or computer and upload them in the Admin Portal.



For more details, see [Audio](#)

## Access number

An access number is the number that routes the caller to the Puzzel solution. Normally, this is the number dialled by the caller. However, in some cases callers may be routed to this number through an access number managed by another operator.

A typical access number for a Puzzel solution is national and has no geographic location (often referred to as an 'NGN', non-geographical number). The price of an access number to the customer is irrespective of whether the number is national or international.

## Silent monitoring

Silent monitoring gives selected users (supervisors) the ability to listen in on conversations between callers and agents, using the agent's phone number (landline or mobile) or softphone. Neither the caller nor the agent will hear the supervisor during the call.

Puzzel can be configured to notify the agent in the Agent Application by showing them a headset icon when someone is monitoring their ongoing call. However, this notification can be turned off, in which case the agent will never be aware that they were monitored.

For more information, read this [article](#).

## Callback

Callback in Puzzel is flexible, with easily definable rules regarding priorities relative to other enquiries. It allows end customers to avoid the frustration of waiting in queue, and customers can offer callers callback from queue, from the web, or via SMS.

Callback can be configured in two main ways:

- Call agent first
- Call customer first

In the first case, the first ready agent is called when the customer's number reaches the front of the queue, and the customer is then called automatically once the agent is on the line. This eliminates the waiting time for customers, but may lead to the agent waiting for the customer.

In the second case, the customer is called when their number reaches the front of the queue, and will then be connected to the first ready agent. This may not eliminate waiting time, as it could take time for an agent to become available, but it eliminates waiting time for the agent.

In either case, the callback will only be attempted three times, and for each failed attempt the call is moved to the back of the queue.

### Callback from a phone queue

Callbacks are commonly offered when the client first arrives in the queue, but only if there are e.g. more than 20 callers in the queue (a modifiable variable). Callbacks can also be offered when the caller has been waiting for more than a given number of seconds or minutes in a queue without a reply, or if the estimated wait time exceeds a given value.

Callbacks are offered through the IVR, for example by asking the caller to press a certain key to be called back, after which the customer will either enter the number on which they want to be called back or they may just confirm they want to be called back on the number they are calling from.

Agents can also schedule callbacks to a customer.

#### Callback from a website

Customers can install a "Call Me" button on their websites, which can be customized to fit the needs of the the organisation. A very simple button would only ask for the caller's phone number, while a more advanced one could ask the caller for more information, such as the subject of the request, a post code, etc. The page the caller is on when the button is pressed can also be passed as a parameter.

Once a caller has pressed the button, a queue tag is entered into the Puzzel queue. The callback takes place when this tag comes first in line.

Agents can also schedule callbacks to a customer.

#### SMS Callback

A Callback can be ordered by the end-user, sending a SMS using a SMS keyword. The SMS Keyword is set up to route the end-users request to the relevant callback queue. The end-user is called based on the configuration set for the callback queue. Several SMS keywords can be configured for one queue or several queues in the solution. E.g. for marketing campaigns several SMS Keywords can be setup for the same queue in order to measure the actual response for each marketing channel.

Puzzel offers various SMS access options for SMS Callback, typical a SMS short code (shared or dedicated) or longnumber.

#### Scheduled Callback

When a scheduled callback/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. 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.

For more details on Schedule Calls, read [here](#).

## Voice recording

Puzzel can be configured to record conversations. This can be done by setting up the solution to record conversations from a queue, or manually by the agent. We caution that both callers and agents should be notified that they will be recorded.

When the solution is set up to record enquiries, the recording will start the moment the agent answers a call, and will end when the agent hangs up. The record button is easily available for the agent, who can stop and resume the recording at any time during the conversation. A scramble button is also available to allow the agent to easily censor parts of the recording, such as credit card information, for privacy and information protection purposes.

Voice recordings can be stored on and accessed via Puzzel's FTP server and the Media Archive. If the customer wants the recording files to be encrypted, we offer secure encryption based on X.509 certificates. The Media Archive lets the supervisor retrieve, listen to, save, and send call recordings. With the search tools, recordings can be searched for using a number of criteria, such as agent name, time of call, caller's number, queue name, etc. Moreover, the call's history is displayed, including how long the caller waited in queue, and to which agent they spoke. Default storage for recordings is one month.

For more details, read this [article](#) on Call Recording.

### Extra recording storage

By default, the voice recordings are stored for a period of one month. You can then subscribe to two packages as stated below:

- Extended storage time, up to 6 months
- Extended storage time, up to 12 months

## Case Management

Puzzel Ticketing is a Case/Ticket management tool that provides your contact centre or helpdesk with the ability to manage written interactions in a secure and efficient way. Each e-mail in the queue is converted into a support ticket and assigned a unique case/ticket ID which is then filtered, categorised and distributed to the right team or agent. On receiving interactions, it is possible to send an auto reply with a predefined template to the sender confirming reception of the email. Furthermore, the tickets can be tagged to help segregate them based on issues or requests. The agent dashboard will always display a comprehensive view of all communications on a ticket with the sender's name presented on the timeline. This also helps in distributing follow up emails to the right team or agent.

Tickets can also be created for requests coming through from various social channels like Facebook and Twitter and assigned them to the right team or agent.

Custom reports can be created using the report builder and saved as standard. These reports can be automatically generated at a set time or frequency and emailed directly to you.

Puzzel Ticketing is part of the Puzzel suite of customer service application and can be combined with the Puzzel Contact Centre to offer a unified platform for ticketing and case management integrated into the contact centre solution. This eliminates the siloed way of operating on two disjoint applications and enhances agent productivity by offering agents new customers' requests in a controlled manner across all channels. You can through business rules define the skills and priority among all channels, and agents can access both applications through one unified agent desktop.

For more details on Puzzel Ticketing read [here](#).

Download the product sheet for Puzzel Ticketing here:

[EN-Puzzel Ticketing.pdf](#)

## CRM Link

Puzzel's CRM popup functionality can be used to 'pop' information from the CRM system (or other systems) to be displayed to the agent when they receive a request. This gives the agent access to more detailed customer information during the conversation, which in turn means better and more personalised customer service.

This is accomplished by passing a customised URL to the Agent Application. When using this method, the information is grabbed from a web front-end that can be called using a URL with embedded parameters. Examples of information that can be included in the variable part of the URL are the caller's number, customer number, and/or the case number.

The price element for CRM Popup is for access to the functionality only, with integration work billed on an hourly basis.

## Campaigns

Puzzel supports the option of impactful and effective email and SMS campaigning which is considered crucial for the growth for any business. This helps to effectively engage with your customers and get the results you need.

While SMS campaigns can be used for short and personalised messages, emails can be used for lengthy messages or bulky attachments of unlimited size. But it is no surprise that both SMS and Email campaigns can make a powerful combination for connecting with your customers.

For more details on the Campaigns functionality, read the article [here](#).

Download the Campaigns Product Sheet here :

[Campaigns Product Sheet.pdf](#)

## Knowledge base (AI Powered)

Knowledgebase is a self-service library of internal information which can be expertly used to deliver value to the customer. This acts as an integral resource of quality information, helping you to gather, organise and evaluate the use of it so that your company can deliver striking customer service.

Puzzel Knowledgebase is designed to be easy to search for information or automatically suggested to the agents by the AI powered engine before being relayed to the customer.

The Puzzel Knowledgebase management system helps the admins to create/edit/delete articles and categorise them to be effectively analysed and served to the agents while answering the customer queries. Agents can suggest articles to the admins through the agent application interface. Agents can also casually flip through the articles in the Knowledgebase using our Knowledgebase Widget.

For more information on Puzzel Knowledgebase, please read the following articles:

- [The Knowledgebase management system](#)
- [Knowledgebase tab in Agent Application](#)

## Advanced Agent Assist

Agent Assist basics is available as standard which provides the details in a customer contact card and also provides a list of interactions from the customer.

The advanced AI powered Agent assist is a progressive segment of the feature that provides additional components for a more enriching experience.

## Interaction Analytics

In addition to the basic features, this also allows the voice and chat transcripts to be viewed as anonymised transcripts, that has been enriched with NLU keyword/Phrase tagging. This can either be manually searched for responding to a customer query. Also, with this you get the sentiment analysis indicator to gauge the customer mood.

### with Knowledgebase

In addition to the basic features, this allows the knowledge articles or FAQ's to be created and maintained for it to be manually searched by the agents while responding to a customer query. Automatic suggestions from the Knowledgebase can also be made available if subscribed to the Interaction Analytics package.

### with Bot

In addition to the basic features, this allows integration with any supported bot framework for automatically extracting suggestions related to the customer query. The agent can also do a manual search for suggestions.

**For more details on Agent Assist, download the product sheet here:**

[Agent Assist Product Sheet.pdf](#)

## Enquiry registration

Enquiry registration enables businesses to identify callers and their reasons for calling.

The supervisor can define categories and topics through the Administration Portal, where Categories represent the main themes of the enquiries and topics are the sub-themes for each category. It is possible to restrict agents to select only 1 topic within a category, or to enable them to select multiple topics. The result of the Enquiry registration can be viewed in the Enquiry registration statistical report.

For more details on Enquiry registration refer to this [article](#).



## Bot Gateway

The Bot Gateway is a hub which allows customers to connect different bot frameworks to Puzzel Contact Centre for the purposes of enabling self-service using chatbots. This hub consists of several ready-built connectors for some popular bot frameworks in addition to an API that allows customers to connect generic bot frameworks. One of the main features of the Bot Gateway is the ability to seamlessly handover chatbot conversations to human agents. Chatbots are made accessible through the standard chat interface from Puzzel or using the chat API.

**For more details, download the product sheet here:**

[Bot Gateway.pdf](#)

## Real-time Voice Interaction Analytics

Real-time Voice Interaction Analytics is a feature that provides relevant and insightful suggestions to the agent, using Agent Assist, while on a voice conversation with the customer. It has the ability to listen to the ongoing conversation and extract the keywords, sentiment, text and context from the speech and suggest responses from various sources including Knowledgebase, chatbots or historical transcripts that might help the agent provide useful resolution to the customer.

## Call Flow Tool

Call Flow Tool is a sophisticated and powerful tool which enables users to make substantial changes to their Puzzel solution, including adding and implementing entirely new call flows. Before designing the services in CFT, Puzzel provides the customer with the required access numbers, system queues, and skills. By default you will only have read access into the Call Flow Tool.

Puzzel will only provide write and install access to users who have participated in training provided by Puzzel and have been CFT certified. Of course, the customer is then fully responsible for any changes made using the tool, as is the case with all other Administration Portal facilities.

For more details, please read [here](#).

## Survey (SMS/Chat)

With this package, organisations can offer their customers surveys via the SMS and Chat channels. For the SMS survey, the caller receives an SMS after a call through Puzzel has ended, where they are asked to rate the service in their last conversation. Supervisors log on to a given Puzzel web page to view analysis of customer feedback. This information is updated every 5 minutes.

### Note

This service is only available in Norway, Sweden, Denmark, and the UK.

The Chat survey is offered to the customer at the end of a chat. When activated, the chatter is given the option to rate the chat either upon the chat ending, or having been sent a copy of the chat transcript to an e-mail address. The rating can be given in stars or using radio buttons. Stars are the simplest, with ratings of 1-5 stars, while radio buttons are most relevant for surveys based on the Net Promoter Score (NPS) standard.

Download the product sheet for Survey here:

[EN-Puzzel SMSSurvey  
productsheet.pdf](#)

[Puzzel  
Survey.pdf](#)

## API Access

API access provides a gate way to almost all agent functionalities in the Agent Application, enabling organisations to integrate its functions into their CRM and software solutions. This service allows the business to develop its own applications using the Puzzel platform.

Key features of the Agent Application can be integrated into the organisation's solutions, CRM systems, Helpdesk applications, mobile, and ERP applications. This can be done by adding Agent Application features behind the buttons and menus of non-Puzzel systems, so that the agent does not need to switch between different interfaces to perform their most common tasks.

Puzzel provides access by setting up the solution, after which API access is available via a set of REST-operations. Puzzel also provides access to required online documentation, making it easy to configure any setting. Nevertheless, it is necessary that you have some knowledge of REST/JSON and the program/app in order to do the integration. Puzzel can also help with the integration process.

For more information on Puzzel API's please refer to [API documentation](#) section.

## Puzzel Workforce Management

Puzzel WFM is our cloud based Workforce Management solution that enables Contact Centre managers to accurately forecast and schedule staff requirements so that rightly skilled agents are available to serve the customers at the right time. While customer service is paramount for any business to grow, managing your staff is equally important to deliver best-in-class experience for customers.

From streamlining the processes involved with agent's performance[real-time adherence], to accurately forecasting and scheduling and improving the ability to make leave requests, Puzzel WFM comes bundles all in one intuitive, easy to understand solution that is great for businesses of all shapes and sizes. Some key features of WFM:

- **Accurate Forecasting:** You can forecast on auto captured historical trends direct from your contact centre.
- **Optimised Scheduling:** You can Schedule your agents to be in the best place possible to achieve the highest service level for your customers.
- **Real-Time Adherence (RTA):** You can gain immediate insight into agent performance to support real-time decision making.

Securely hosted within an enterprise-grade cloud infrastructure makes the upgrades, security-patching and version control seamlessly optimised.

For more information on Puzzel WFM, please [refer](#) to this article.

## Dialler

The Dialler gives you the ability to create outbound call campaigns to a given list of contacts. When active, the Dialler will go through the list of contacts and call them automatically, connecting them to the available agents. When the agent is offered a call from a campaign queue, they are presented with information about the contact in the Agent Application. The agent can categorise each answered call, and optionally reschedule it for a more suitable time.

Agents are assigned to the Dialler campaigns based on their profiles and can be configured to answer only to the campaign queues or both outbound and inbound queues. Call Blending makes it easy to combine inbound and outbound calls in a seamless manner, with outbound calls from the Dialler list given lower priority than normal inbound calls.

The Dialler is highly configurable and supports different modes as explained below:

- Preview mode: calls the agent first, who can then review the details before making the call to the contact.
- Progressive mode: calls the contact first for each available agent.
- Power mode: calls the contact first and connects to the available agent when the call is answered. The admin can configure the over dial pace to reduce silent calls.
- Predictive mode: calls the contact first and connects to the available agent when the call is answered. In this mode, the dialler will predict, when agents will become available to pick the call using real-time data from the solution. This helps in minimising silent calls.

Dialler functionality increases the efficiency of the contact centre's resources. Please refer to the [Dialler](#) section for the user guide article.

For more details on Dialler, download the product sheet here:

[Dialler Product Sheet.pdf](#)

## Switchboard

### Catalog search including Exchange Sync

The Puzzel Catalog is a web-based tool which provides contact directory information for all employees in a company. In essence, it is an internal phone directory, enabling Puzzel agents to find directory information about other employees, such as contact information, addresses, opening hours, and so on.

Directory data can be obtained in the following ways:

- Exchange Sync
- File import
- Web interface

Exchange Sync is a tool which automates data integration between Catalog, Exchange, and Active Directory. When using Exchange Sync, the company can also use the Catalog to synchronise employee calendars. Agents with the right permissions are able to register new appointments and record absences.

For organisations that do not use MS Exchange or Active Directory, the solution can be integrated with the customer directory (such as IBM Notes and other systems) as file imports via FTP. However, this method does not support calendar import.

Finally, the Catalog can be accessed via a web interface for manual adding, editing, and deleting of contacts and contact information.

### Presence Hub

The Presence Hub project is an implementation, which allows Puzzel to show real time status on employees' phones. Employees must have mobile phone subscriptions adapted to Puzzel's Presence Hub, and integration between the mobile operator and Puzzel needs to be in place.

The system consists of a number of modules, which make its operation possible.

The first module is the Source of Presence. This is typically some sort of API at a mobile operator. This source is also called a Producer.

Another part of the system consists of source and destination Connectors. In essence, connectors get presence from the source, or forward presence from the database to a consumer of presence. Some connectors handle both functionalities. There is also the Database, and an admin interface and web medium for managing Presence.

### Voicemail

Voice mail can be set up to cover certain company functions. This feature is not intended for use by individual people in the organisation.

Voice mail can be useful for example outside of normal office hours, when there are no free agents and there is no possibility to queue, or when there is a very long queue.

When a caller has left a message, an e-mail with the audio file is sent as an attachment to a predefined e-mail address. The audio file is in raw waveform format (.wav).

### Switchboard Widget

Puzzel offers a Call and Transfer widget which functions similar to a traditional switchboard for searching a contact and transferring a call without having to move away from the request tab. The agents can check the status of the contact and transfer the call if required. Contacts can be searched from various sources and then actioned to be transferred.

Download Switchboard Product Sheet here:



[Switchboard Product  
Sheet.pdf](#)

## Raw Data

When the customer requires bespoke or custom reporting outside of the historical reports available as standard, Puzzel's Raw data solution provides access to call event and request records extracted directly from Puzzel's database. This data is then made available in a separate SQL database placed in Puzzel's environment that only the relevant company has access to via SSL.

The call/request records are made available shortly after each request has ended, which is normally 5 minutes after the event.

Customers with database management expertise can make use of this data in producing bespoke reports, or directly in e.g. external BI systems.

It should be noted that Puzzel does not include support for how to write SQL queries in the Raw data product, and Puzzel's Support department cannot assist with customer-created SQL queries. Puzzel only provide the Raw Data for customers to manipulate for their own reporting requirements.

Read this [article](#) for more details on Raw data.

### Note

- 1) Initial Raw data training is compulsory
- 2) We only provide Raw data starting from the 1st of the month in which the Raw data was ordered.

## Puzzel Quality Assurance

Puzzel Quality Assurance automates part of the Quality Assurance process to make sure customers receive the right information when they get in touch with your organisation. The robust framework collects, analyses, and provides insight into customer interactions, from both calls and chat sessions, to help evaluators identify, focus, and take actions on interactions that matter the most. This ensures positive impact on agents which leads to greater customer satisfaction.

Puzzel QA facilitates in designing and building scorecards to suit your organisation needs and also helps you define workflows and actionable insights to monitor quality of the conversations. You can also create performance reports and export them if needed.

Puzzel QA also offers two Add-ons to enhance your evaluation process.

1. Calibration and Automation: Calibrations are a great way of determining if the evaluators are grading the interactions on the same curve. This aids in standardising the evaluation process and assess the interactions fairly. Automation helps in configuring contact types, agent, and evaluator quotas for generating and tracking QA team workload.
2. Coaching and 1-to-1: Schedule and facilitate 1-to-1 interactive coaching and track progress, all in one place.

[Puzzel Quality Assurance.pdf](#)

## Text to Speech for IVR Audio

Puzzel's neural Text to Speech [TTS] capability converts written text into spoken words on the fly using the speech synthesis technology that can be used instead of a pre-recorded message in an IVR. It is a powerful way to add a human touch to your communication approach which is so natural and indistinguishable from the recordings of real people. Not only does TTS help communicate to customers in a personalised way, but it also makes the conversation more human and interactive. These speech or audio files can be generated in Admin portal and used in the Call flow for providing a personalised support to customers. This human-like natural conversations encourages self-service customer experience and greater satisfaction in every call.

Puzzel's TTS for IVR Audio capability has been extended to support multiple languages and is likely to expand more. Messages can simply be typed to generate speech from a list of language(s), voice and style you need, eliminating the need for one or more humans to speak and record the content with the accent of a native speaker.

Benefits of Puzzel's TTS:

- Lower operational cost as less human intervention is required
- Flexibility to make changes instantly
- Reduced errors
- Better consistency
- More humane
- Wider language support

[Text to  
Speech.pdf](#)

## Voice Bot

Puzzel's Voice Bot is an Intelligent Virtual Assistant [IVA] that understands human speech and can extract meaningful intents as well as sentiments during a phone conversation and uses synthesised voice to respond to the queries. It can be programmed to respond to a wide range of queries in a personalised, engaging, and human-like support to achieve faster resolution times. The Puzzel Voice Bot can be used for routing a caller to an appropriate queue without the need for complex IVR menu options.

The Voice Bot transcribes the caller's speech in real-time and analyses the text for keywords and sentiments. It also identifies certain types of Personally Identifiable Information such as names, locations, and other sensitive information such as social security numbers etc, which can be used for the purposes of routing or used to lookup information from an external source such as a CRM. The Voice Bot can be designed to handle simple queries by replying to the caller using synthesised speech or gracefully transferred to a human agent for any complex issues. During the transfer to the agent all the necessary details gathered during the automated call will be presented to the agent in the call transfer widget so that the customer doesn't have to repeat himself.

Advantages of Puzzel Voice bot:

- Allows automation of mundane requests and call routing
- Uses text analytics to extract meaningful intents and sentiment
- Real time transcription support for more than 85 languages
- Provides faster resolution to customers
- In addition, build IVA for your voice channel using your own bot via Bot Gateway

## Voice Transcriptions

Puzzles' Voice Transcription ability is a step forward into delivering a quality customer service by gaining insight into the past customer interactions happening on a voice channel. This is indeed an important and powerful tool for any business who aim to elevate their service levels by providing accessibility to past customer conversations that facilitates improved understanding of the customer. The Voice transcription feature will transcribe all recorded voice calls and create transcriptions automatically that will be made available to the agents within the Agent Assist via interaction history. Before being served to the agents, the transcriptions are subjected to analysis for the purposes of extracting relevant topics or keywords and then automatically tagged with conversations. This aids the Agent Assist to suggest relevant topics to the agents based on historical conversations.

Transcribed voice calls are also made available in the media archive for viewing and searching within media archive.

Voice transcriptions is currently available in the following languages:

- English Global
- Norwegian
- Swedish
- Danish
- Finnish

## Single Sign-on

### Puzzel Agent Application SSO using Azure

Puzzel Agent Application offers SSO towards Azure so that agents can seamlessly logon to the application. A harmonious SSO login process into Puzzel Agent Application can be achieved if your organisation is using Microsoft Azure that helps you to utilise the Azure authentication process to login into the Puzzel Agent Application.

For more details on Puzzel Agent Application SSO, please refer to this [article](#).

### Salesforce SSO

Puzzel Agent Application Single Sign On is now supported in Salesforce. This helps the agents to seamlessly logon to Puzzel Agent application if they have already logged on into Salesforce.

For more details, read this [article](#).

### Single sign-on using Auth0

Users can log on to Puzzel agent application and administration portal with single sign-on. By single sign-on, users log on to the solution without entering username and password if the user is authenticated in his "host" system with any of the following:

- Active Directory/LDAP
- ADFS
- IP Address Authentication
- Ping Federate
- SAML Identity Provider
- SharePoint Apps
- Google Apps
- Office 365
- Microsoft Azure AD

The single sign-on solution is provided through the third party vendor Auth0.

## Customer list search

Organisations can also import contact lists into the Puzzel solution. The list can contain information about e.g. customers, and by doing this information about callers appears in the Agent Application's enquiry window when there is an incoming call from someone on the list. This lookup is based on the caller's phone number.

Agents can also add additional information about registered callers during the call. This additional information will be displayed along with the original information the next time the customer calls.

Additionally, in Scandinavian markets an external address lookup function can be implemented. This lookup is done in a national number database. Response parameters might be date of birth, first name, surname, gender, house number, municipality, entrance, zip/post code, area, or record type (person, business, hybrid, unknown). The information is normally presented in the Agent Application under call details. The license for this functionality includes 1000 lookups per agent per month. For higher volumes, additional licenses must be added.



## External lookup

When a customer calls the Puzzel platform, the IVR can ask the caller for any information and in turn use that information for a search in 3<sup>rd</sup> party systems. The platform can then send a request to the company's web service or web server in one of two ways:

- HTTP(S) GET: Parameters sent in the URL
- HTTP POST: Parameters passed via XML-formatted POSTs

Both of these methods result in Puzzel's platform receiving an XML document containing the requested information from the company.

This information can in turn adjust how the call is treated within the IVR. A practical example of this ability could be to take some basic customer details, such as a customer number, use an external lookup to find that customer's current balance with the organisation, and then read that balance back to the customer for self-service purposes. The information can also be used by the IVR to appropriately direct the call, and/or it can be sent to the agent to provide them with contextual information for the call.

The connections used for this service are secured with HTTPS and/or Basic Authentication.

## Additional modules

Additional features are a separate set of functionalities provided by third party integrated into Puzzel products. These features can be subscribed to individually and configured based on customer requirements. Currently Puzzel offer the following third party functionalities:

- [Boost AI](#)
- [Verint WFM/WFO](#)
- [PCI Phone payment](#)
- [Identification and Verification](#)

## Boost AI

Bot/virtual assistant framework is provided by Puzzel's partner Boost.ai. It is integrated to Puzzel Contact Centre through the "Bot gateway" module. There are three different package alternatives reflected in the pricing:

| What you get                           | Starter                              | Standard                             | Enterprise                    |
|--|--------------------------------------|--------------------------------------|-------------------------------|
| Intent packages                        | General questions & internal support | General questions & internal support | Pre-trained domain knowledge* |
| Direct messaging channels              | Unlimited                            | Unlimited                            | Unlimited                     |
| Language support                       | English + 1                          | Unlimited                            | Unlimited                     |
| Online certification                   | x                                    | x                                    | x                             |
| Automatic Semantic Understanding (ASU) | x                                    | x                                    | x                             |
| Audit log                              |                                      | x                                    | x                             |
| Multi-agent functionality              |                                      | x                                    | x                             |
| Tiered access                          |                                      | x                                    | x                             |
| QA staging environment                 |                                      | x                                    | x                             |
| Virtual private cloud environment      |                                      | x                                    | x                             |
| On-premise hosting**                   |                                      |                                      | x                             |
| Security API (operation centre)        |                                      |                                      | x                             |
| 24/7 critical support                  |                                      |                                      | x                             |

\*Available for banking, insurance, telco.

\*\* Additional cost for setup and maintenance

### Note

There is a monthly subscription fee for this service, in addition to a price per conversation.

## Verint WEM

Verint Workforce Engagement Management module offered by Puzzel consists of the following:

- [Verint Workforce Management](#)
- [Verint Quality Management](#)
- [Verint Performance Management](#)
- [Verint Speech Analytics](#)

## Verint Workforce Management

This cloud-based omni-channel workforce management (WFM) solution, powered by Verint, provides accurate forecasting for intra-day, daily, and long-term workload. It can help you produce optimal schedules by balancing predefined shift rules, work patterns, breaks, targeted service-level goals, and your employees' individual skills, proficiencies, and preferences. Verint WFM provides as standard the following:

- Forecasting
- Scheduling
- Blended Media
- Real Time Adherence
- Request Management (Time, Off, Shift Swaps, and Shift Requests and Changes, Shift Bids)
- Mobile Apps for Agents and Team Leaders
- Strategic Planner (Standalone desktop client)

Download the product sheet for Verint Workforce Management here:

[Verint Workforce Management.pdf](#)

## **Verint Quality Management**

Verint Quality Management (QM) is used to evaluate and 'score' agent interactions, identify 'gold standard' calls and demonstrate to agents where they can improve or where a call was handled well. QM includes evaluation forms to enable interactions to be reviewed and scored, and integrates automatically with Verint Performance Management, to allow scores to be reviewed by individuals, supervisors, team managers and senior management as appropriate.

## Verint Performance Management

Many organisations struggle with managing and improving employee performance in their customer service departments. With a plethora of systems and data in their contact centres, back-office and branch operations, it's easy for managers to drown in data, even when very little of it may be directly useful.

Verint Performance Management (PM), can capture and aggregate data across multiple systems while providing a single, standardised framework for efficiently tracking, managing, and improving individual, team, and organisational performance. Performance Management integrates with all other Puzzel WFO solutions to provide a complete Contact Centre Performance Management solution.

Verint PM as a standard provides:

- Scorecards
- Performance Plans
- Coaching
- eLearning

Download the Verint Performance Management product sheet here:

[Verint Performance Management.pdf](#)

## Verint Speech Analytics

Verint® Speech Analytics™ provides advanced functionality that can automatically surface intelligence from thousands — even millions — of recorded calls, so you can take action quickly. This next-generation analytics solution can reveal the intelligence essential for pinpointing cost drivers, trends, and opportunities; identifying strengths and weaknesses with processes and products; and understanding how your offerings are perceived by the marketplace.

Right out of the box, Verint Speech Analytics can provide sophisticated conversational analytics to automatically identify, group, and organise the words and phrases spoken during calls into themes, helping to reveal rising trends and areas of opportunity or concern. Going beyond merely isolating words used repeatedly during a specific time period, Verint's conversational analytics can identify and group words that are different, but contextually related to a particular topic, such as relating overage, minutes of usage, and late charges to "fees."



## PCI Phone Payment

Puzzel in collaboration with PCI Pal enables your business to take secure keypad payments through phone. Agents can now process the credit/Debit card payments without seeing or hearing the sensitive card details, while still in conversation with the customer. This enables you to de-scope your contact centre from the PCI DSS regulations by keeping the sensitive card data outside of your environment.

PCI phone payment platform captures the DTMF tone from the customer's phone and masks them, preventing the sensitive payment information from reaching the agent. When a phone payment is required, the agent initiates a session which reroutes the audio through secure PCI Pal platform. The card details entered by the customer is then intercepted by PCI Pal and processed through payment gateway.

By using this feature you are moving away from handling sensitive data in your contact centre environment, de-scoping from the requirements of PCI DSS, yet providing your customer the best service you possibly can.

## Identity & Verification

The ID&V Authentication module allows you to securely verify the identity of a customer during an interaction on a phone or a chat, in a visually assisted step-by-step manner. It supports BankID in Norway and Sweden, Finnish Trust Network (FTN) in Finland and NemID in Denmark.

Danish Customer must pre-register themselves by Nets in Denmark and will be invoiced directly from Nets in addition to the Invoice from Puzzel.

This Module will be invoiced on a monthly subscription basis and per transaction basis. Setup costs applies.

**Download the product sheet for Identification and Verification here:**

[Puzzel Identity and Verification.pdf](#)

## Integrations

This section contains the module description of the following:

- [Microsoft Dynamics Integration](#)
- [Salesforce Integration](#)
- [Microsoft Teams Integration](#)
- [Puzzel-Zendesk Integration](#)

## Microsoft Dynamics integration

The Microsoft Dynamics CRM integration is a smart way of bringing Puzzel application and customer data to be represented on a single interface. With CRM integration you can bring together disparate systems – one that has data in it and the other that uses it – to build a unified view for the agents.

Microsoft Dynamics CRM has been integrated into the Puzzel solution in the form of a widget. The customer details are retrieved from the CRM and displayed in the tab within the Agent Application for all incoming calls and chat requests. The agents can view/edit/add customer details without having to switch between applications. A click to call functionality facilitates the agents to make calls using the call widget in the agent application.

Refer to Microsoft Dynamics integration user guide by navigating to the [user guide section](#) on our Help Centre.

**For more details, download the product sheet here:**

[Microsoft Dynamics Product sheet.pdf](#)

## Salesforce Integration

Puzzel application is indigenously integrated into the Salesforce environment. Native integration allows you to bring Puzzel's capabilities into the CRM. While the agent is able to access a wealth of customer data stored within Salesforce, he can also use Puzzel's call, chat, email and dialler functionality to perform actions, driven by the data fetched from the CRM.

Puzzel has created a SSO into Salesforce that allow agents to seamlessly logon into Puzzel Agent Application if they have already logged on into Salesforce. With the help of the record viewer functionality, the agents can now view historic chat transcripts and listen to previous call recordings archived in the Puzzel application to gauge the customer mood and help them in the best possible way. It is a passive tool which simply permits you to access the archive after having authenticated into the Puzzel Application.

Any new lead or case registered within Salesforce can be assigned to the available agent by the Puzzel's routing engine. The triggers for this mechanism can be defined in the workflow of the Salesforce Logic Apps.

Refer to the following user guide articles:

- [Salesforce User Guide](#)
- [Puzzel Agent Application SSO in Salesforce](#)
- [Salesforce Logic Apps](#)

**For more details, download the product sheet here:**

[Salesforce Partner sheet.pdf](#)

## Microsoft Teams integration

Integrating Microsoft Teams with Puzzel Contact Centre solution could improve collaboration within your company, boosting agent productivity. This allows you to determine the presence of the user, current status, and calendar information. Puzzel's built-in functionality allows you to make calls and send messages without having to leave the platform, making it an efficient way of communication. By default, anyone within your organisation using Teams can see if other users are available online.

For user guide articles on Microsoft Teams integration, read this [article](#).

Download the Microsoft Teams Product Sheet here:

[Microsoft Teams Product Sheet.pdf](#)

## Puzzel-Zendesk Integration

The Puzzel, Out of the box integration, with Zendesk allows agents to handle Puzzel calls within Zendesk, facilitating a single user interface for a seamless experience. Phone support from Puzzel is a powerful extension, as tickets are automatically created for every inbound/outbound call within Zendesk support. As a result agents can immediately start taking notes about the call and capture relevant information needed to solve the customer issue. In addition to this, agents are empowered to use the Puzzel voice features such as search for a contact using catalog search, transfer call to another agent or queue, and consult another agent during a call. Outbound calls from Puzzel can go through landline, mobile phone, or softphone.

Furthermore, agent status is automatically updated within Zendesk [can be changed manually too] to reflect their availability.

Puzzel-Zendesk integration also provides Queue, Team and Agent overviews to gain greater control over resource allocation.

Benefits of Puzzel-Zendesk integration include:

- Out of the box integration without any fussy configurations needed
- Increased first time resolution rates and customer experience
- Better grip over resource allocation

### Note

Please note that the **Puzzel by helphouse.io** app is available for free on Zendesk marketplace. However, you will need to have:

- 1) Zendesk Talk License
- 2) Puzzel account that can be used to login within Zendesk

[Zendesk  
integration.pdf](#)

## Numbers and connectivity

### Puzzel Express Connect SIP Trunk

Puzzel Express Connect SIP Trunk works with VoIP phone systems (Voice Over Internet Protocol) and is based on the Session Initiation Protocol (SIP) protocol: RFC 3261, RFC 2543. Puzzel Express Connect SIP Trunk enables a prolonged lifetime of previous investments in your Enterprise PBX solution and integrates the agents' local client (desktop- or softphone) to the Puzzel Contact Centre Solution.

Priced for minimum 50 agents. One license is valid for a capacity of up to 5 concurrent voice channels.

**For more details, download the product sheet here:**

[EN-Puzzel Express Connect SIP Trunk.pdf](#)

### Multi Carrier Option

Puzzel offers an option where service numbers can be rerouted in case of problems. When a problem is detected with a provided access point to the Puzzel platform on your primary network carrier, it is automatically switched to an access point on a secondary carrier. This provides an automatic redundancy in the case of carrier outages. This redundancy works for both inbound and outbound requests, though via slightly different mechanisms. While the inbound mechanism is entirely automatic, the switch for outbound requests is set with a service variable by the customer (switching from Primary Call Routing to Secondary Call Routing).

The mechanism detects faults with a carrier and switches to a backup SIP-trunk from the service number provider into the Puzzel platform. This adds significant security against carrier outages. Please note however that we cannot guarantee complete security as in all possible cases there will necessarily still be a reliance on a service number provider.

#### Note

This configuration has a reduced SLA level for availability and is set to 98%.

### Telenor IPT Partner Connect

This connects Puzzel Contact Centre and enables necessary trunk capacity to the partner solution. The voice traffic to agents, other employees and service-platforms connected to the partner solution is routed directly to the Partner from Puzzel without any traffic fees. The voice traffic to external recipients are also routed to and handled by the Partner. Puzzel's Partner, invoice the customers for external calls on existing Traffic Agreement unless otherwise agreed.

**For more details, download the product sheet here:**

[EN - Telenor IPT and MBN Partner Connect Product Sheet.pdf](#)

#### Note

This product is only available in Norway



## Training and Consultancy

### Admin Training Full Day

**Length : One day**

**Maximum number of attendees: 8 participants**

This course is for Systems Administrators and Contact Centre Managers who will manage and maintain the Puzzel Solution on a day to day basis. This course provides in-depth knowledge of administrating the applications that will be delivered to the Contact Centre. It also provides the knowledge of how to measure incoming traffic, the CC performance and how to tune according to the statistic results

The training covers the following content:

- User Management
- Filters and rights
- Services
- Archive
- Real Time Monitoring
- Statistics

For more details download our product sheet here:

[Puzzel Admin Portal.pdf](#)

### Call Flow Tool Basic Training – Full day

**Length: 1 day**

**Maximum number of attendees: 8 participants**

Covers the architecture and logic of Puzzel's Contact Centre Solution, as well as the structure and use of the Call Flow Tool, and provides the participant with the competence required to create new call flows or edit existing ones in their Puzzel solution. The training leads up to the CFT certification test, which covers CFT use cases (how-tos), modules, troubleshooting, and the limitations and responsibilities inherent to customers using CFT to manage their solutions.

The training covers the following content:

- Planning
- Preparations
- Versions management
- Building blocks
- Building
- Testing

For more details download our product sheet here:

[Puzzel Call Flow Tool  
Training.pdf](#)

## Statistics Training

**Length: Half day**

**Maximum number of attendees: 5**

The course aims to train you on how to run reports, analyse your data, help solve problems and optimise the processes. The training reviews different types of standard reports, the three tiers of reporting as well as reporting periods and subscriptions. Each training course looks at client's individual set up and offers hands on experience of interacting with their own Puzzel CCP.

For more details download our product sheet here:

[Puzzel Statistics  
Training.pdf](#)

## Agent Application Train the Trainer Training

**Length - 1 day**

**Maximum number of attendees: 8 participants**

This course provides you with the theoretical and practical knowledge you need to successfully manage and deliver the training for the Puzzel Agent Application. This training presents a blend of administration information and hands-on experience, while an expert trainer will work with you to guide you through the course materials and how to deliver the training to others.

The training covers the following content:

- Personal settings
- Logging in / Pause / Logging off
- Request handling
- Call handling
- Softphone
- Queue overview
- Agent statistics
- Run through of materials
- Guidance for delivery

For more details download our product sheet here:

[Puzzel Train the  
Trainer.pdf](#)

## Agent Training Sessions

Agent training can be book as a 2 hour block or as a full day course based on the level of training required.

### Agent Training - two hour block

**Length : one block (2 hours)**

**Maximum number of attendees : 15 participants**

This course is for any user in the contact centre who will answer and handle customer interactions on a day-to-day basis. The course provides in-depth knowledge of how to handle contact requests through various media that will be delivered to the contact centre.

The training course covers the following content:

- Personal settings
- Logging in / Pause / Logging off
- Request handling
- Call handling
- Softphone
- Queue overview
- Agent statistics

### Agent Training - Full Day

**Length: 4 blocks (4 x 2 hours)**

**Maximum number of attendees: 60 participants (15 participants per block)**

This course is for any user in the contact centre who will answer and handle customer interactions on a day-to-day basis. The course provides in-depth knowledge of how to handle contact requests through various media that will be delivered to the contact centre.

The training covers the following content:

- Personal settings
- Logging in / Pause / Logging off
- Request handling
- Call handling
- Softphone
- Queue overview
- Agent statistics

Training includes preparation.

For more details download our product sheet here:

[Puzzel Agent Application Training.pdf](#)

## Puzzel WFM training

### Discovery Workshop [2 hour slot]

An exploratory workshop session built around your contact centre to explain how we forecast and schedule agents. This session mainly focusses on customer contact centre environment and how we forecast and schedule agents. This includes going through queues and Pause reasons in Puzzel and deciding on how it needs to be handled. At the end of the session, a spreadsheet would be created and sent to finalise the details.

### Setup Training [2 hour slot]

This session mainly focusses on the initial setup of the Puzzel WFM system, which includes opening hours, office locations, users of the system etc. Typically, the session will end by building shifts which will then be finished off by the customer before the next session.

### Forecasting and Scheduling [2 hour slot]

This session is mainly to go through the forecasting and scheduling process. Included in this session is the completion of adherence mapping so it can be seen working the same day. A training session will be held for agents to introduce them to the agent portal.

### Go Live Training [2 hour slot]

This session is about setting a Go Live date, creating schedules from that date including what needs to be done to create a relevant schedule with things such as holidays included as part of scheduling. Adherence is also to be checked to make sure it is working correctly and all activities from Puzzel Contact Centre are mapped.

## WFO Training

The training for all WFO solutions will be delivered online to customers according to an agreed schedule. It will also use the train-the-trainer method to allow customers to train other colleagues themselves. The training content as well as extensive documentation will be delivered at the end of the training.

## Puzzel Case Management

### Admin Training [ 1 day]

#### Maximum number of attendees: 8 participants

This is a one day course aimed at managers, administrators and supervisors. This is a comprehensive training session provided to all admins to help them manage and maintain the Puzzel Ticketing system on a day to day basis. It delivers an in-depth knowledge of the various functionalities with the ticketing system, so that you can perform your tasks more efficiently.

### Agent Training [Half day]

#### Maximum number of attendees: 15 participants

The aim of the half day training course is to ensure Agents acquire the skills and knowledge required to be confident in using

the Puzzel Case Management platform. The course covers functionality, handling tickets, attributes and attachments as well as management of the address book and dashboard.

## **Project Management**

Scoping, design, implementation and delivery of the solution to the customer.

## **Consultation services per hour**

Professional services offered by Puzzel on an hourly basis.

## **Floor walking session**

First-day support, where the trainer spends time on site and walks the floor, responding to individual queries, problems, tasks and work-related issues from members of your staff. The Floor walking session is a highly appreciated service which ensures a smooth start and allows you to quickly sort out any teething issues that might occur.

## Partner Training course

Partner training has two parts:

- [Partner Technical Training](#)
- [Training as Service Packages](#)

## Partner Technical Training

### Puzzel Contact Centre – Implement Program

**Length : 3 days**

**Maximum number of participants: 8 people**

**Audience: Engineer**

Puzzel Contact Centre – Implement. This is a three day implementation program which is aimed at empowering engineers through workshops and training, to work with clients and identify how to set up and implement the best PPC solution for their needs. This course is only available to partners and not for clients that have been sold through partners.

### Puzzel Contact Centre – Train the Trainer Program

**Length : 3 days**

**Maximum number of participants: 8 people**

**Audience: Trainer**

Puzzel Contact Centre – Train the Trainer Training. This is a three day train the trainer course. It covers training for the administration portal, call flow tool and the agent application. Suited for trainers, it includes all lesson plans and documentation needed to deliver the training course. This course is only available to partners and not for clients that have been sold through partners.

### Puzzel Workforce Management – Implementation Training

**Length : 2 days**

**Maximum number of participants: 8 people**

**Audience: Consultant/ Engineer**

Puzzel Workforce Management – Implement Training. This is a two-day course aimed at consultants and Engineers. The aim of the training is to empower partners with the skills and knowledge to implement WFM for their clients and train other users on how to use the WFM platform. The course includes all lesson plans and documentation needed to implement and deliver the training course. This course is only available to partners and not for clients that have been sold through partners.

### Puzzel Workforce Management – Train the Trainer Training

**Length : 1 days**

**Maximum number of participants: 8 people**

**Audience: Trainer**

Puzzel Workforce Management – Train the Trainer Training. This is an one day course aimed at trainers. The aim of the training is to empower partners with the skills and knowledge to train other users on how to use the WFM platform. The course includes all lesson plans and documentation needed to implement and deliver the training course. This course is only available to partners and not for clients that have been sold though partners.

## **Puzzel Case Management – Implementation Training**

**Length : 2 days**

**Maximum number of participants: 8 people**

**Audience: Engineer**

Puzzel Case Management – Implementation Training. This is a two-day course aimed at consultants and Engineers. The aim of the training is to empower partners with the skills and knowledge to implement Case Management for their clients and train other users on how to use the Case Management platform. The course includes all lesson plans and documentation needed to implement and deliver the training course. This course is only available to partners and not for clients that have been sold though partners.

## **Puzzel Case Management – Train the Trainer Training**

**Length : 1 days**

**Maximum number of participants: 8 people**

**Audience: Trainer**

Puzzel Case Management – Train the Trainer Training. This is a one day course aimed at trainers. The aim of the training is to empower partners with the skills and knowledge to train users on how to use the Case Management platform. The course includes all lesson plans and documentation needed to implement and deliver the training course. This course is only available to partners and not for clients that have been sold though partners.

## **Puzzel Contact Centre – Statistics Training**

**Length : Half day only**

**Maximum number of participants: 8 people**

**Audience: Engineer**

Partners Statistics training. This training is for ½ day and is aimed at engineers to train them how to run reports, analyse r data, help solve problems and optimise the processes. The training reviews the different types of standard reports, what are the three tiers levels of reporting as well as reporting periods and subscriptions. This course is only available to partners and not for clients that have been sold though partners.



## **Training as Service Packages**

### **Access All Areas – Individual Subscription**

**Number of passes : 1**

**Length of Contract : 12 months**

Access All Areas – Individual. This Training as a Service (TaaS) package is aimed individuals who would like full access to all our training across all our product lines, access all content as well as full subscription to the Puzzel Academy. This will allow individual users to attend unlimited courses and workshops and access all content to continually improve their personal development. This service is only available to partners and not for clients that have been sold through partners. Courses can be taken multiple times at no additional costs. All packages are 12 monthly contracts, payable quarterly in advanced. Prices are the yearly cost.

### **Access All Areas – Team Subscription**

**Number of passes : 5**

**Length of Contract : 12 months**

Access All Areas – Team. This Training as a Service (TaaS) package is aimed at teams of up to 5 users who would like full access to all our training across all our product lines as well as full subscription to the Puzzel Academy. This will allow all 5 users to attend unlimited courses and workshops and access all content to continually improve their personal development. This service is only available to partners and not for clients that have been sold through partners. Courses can be taken multiple times at no additional costs. All packages are 12 monthly contracts, payable quarterly in advanced. Prices are the yearly cost.

### **Access All Areas – Corporate Subscription**

**Number of passes : 10**

**Length of Contract : 12 months**

Access All Areas – Corporate. This Training as a Service (TaaS) package is aimed at teams of up to 10 users who would like full access to all our training across all our product lines as well as full subscription to the Puzzel Academy. This will allow all 10 users to attend unlimited courses and workshops and access all content to continually improve their personal development. This service is only available to partners and not for clients that have been sold through partners. Courses can be taken multiple times at no additional costs. All packages are 12 monthly contracts, payable quarterly in advanced. Prices are the yearly cost.

### **PCC and Case Management – Individual Subscription**

**Number of passes : 1**

**Length of Contract : 12 months**

Puzzel Contact Centre and Case Management – Individual. This Training as a Service (TaaS) package is aimed individuals who would like access to our Puzzel Contact Centre and Case Management training programs as well as full subscription to the Puzzel Academy. This will allow individual users to attend all PCC and case management courses and workshops and access all content to continually improve their personal development. This service is only available to partners and not for clients that have been sold through partners. Courses can be taken multiple times at no additional costs. All packages are 12 monthly contracts, payable quarterly in advanced. Prices are the yearly cost.

## **PCC and Case Management – Team Subscription**

**Number of passes : 5**

**Length of Contract : 12 months**

Puzzel Contact Centre and Case Management – Team. This Training as a Service (TaaS) package is aimed teams of up to five users who would like access to our Puzzel Contact Centre and Case Management training programs as well as full subscription to the Puzzel Academy. This will allow 5 users to attend all PCC and case management courses and workshops and access all content to continually improve their personal development. This service is only available to partners and not for clients that have been sold through partners. Courses can be taken multiple times at no additional costs. All packages are 12 monthly contracts, payable quarterly in advanced. Prices are the yearly cost.

## **PCC and Case Management – Corporate Subscription**

**Number of passes : 10**

**Length of Contract : 12 months**

Puzzel Contact Centre and Case Management – Corporate. This Training as a Service (TaaS) package is aimed teams of up to ten users who would like access to our Puzzel Contact Centre and Case Management training program as well as full subscription to the Puzzel Academy. This will allow ten users to attend all PCC and case management courses and workshops and access all content to continually improve their personal development. This service is only available to partners and not for clients that have been sold through partners. Courses can be taken multiple times at no additional costs. All packages are 12 monthly contracts, payable quarterly in advanced. Prices are the yearly cost.

## **Puzzel Workforce Management – Individual Subscription**

**Number of passes : 1**

**Length of Contract : 12 months**

Puzzel Workforce Management – Individual. This Training as a Service (TaaS) package is aimed at individuals who would like access to our Workforce Management programs as well as full subscription to the Puzzel Academy. This will allow the individual to attend all WFM courses and workshops and access all content to continually improve their personal development. This service is only available to partners and not for clients that have been sold through partners. Courses can be taken multiple times at no additional costs. All packages are 12 monthly contracts, payable quarterly in advanced. Prices are the yearly cost.

## **Puzzel Workforce Management – Team Subscription**

**Number of passes : 5**

**Length of Contract : 12 months**

Puzzel Workforce Management – Team. This Training as a Service package is aimed teams of up to five users who would like access to our Workforce Management programs as well as full subscription to the Puzzel Academy. This will allow five users to attend all PCC and case management courses and workshops and access all content to continually improve their personal development. This service is only available to partners and not for clients that have been sold through partners. Courses can be taken multiple times at no additional costs. All packages are 12 monthly contracts, payable quarterly in advanced. Prices are the yearly cost.

**Puzzel Workforce Management – Corporate Subscription**

**Number of passes : 10**

**Length of Contract : 12 months**

Puzzel Workforce Management – Corporate. This Training as a Service package is aimed teams of up to ten users who would like access to our Workforce Management programs as well as full subscription to the Puzzel Academy. This will allow ten users to attend all WFM courses and workshops and access all content to continually improve their personal development. This service is only available to partners and not for clients that have been sold through partners. Courses can be taken multiple times at no additional costs. All packages are 12 monthly contracts, payable quarterly in advanced. Prices are the yearly cost.

## Puzzel Support

Puzzel provides excellent basic support to all their customers. Our support engineers are friendly and efficient in providing a perfect resolution to your problems.

Basic support is given to all Puzzel customers through written requests Only. Customers can chat with our support engineers via web chat or by raising a ticket through [help.puzzel.com](https://help.puzzel.com) and clicking on the Support tab on the right. Support is only available during business hours.

Customers can avail any further support by subscribing to the following two packages:

- **Puzzel Extended Support:** Customers can avail extended support through phone and written requests (Chat & Tickets via [help.puzzel.com](https://help.puzzel.com)) during business hours and emergency On Call Support until 21:00 pm.
- **Puzzel 24/7 Support:** Customers can avail phone and written requests (Chat & Tickets via [help.puzzel.com](https://help.puzzel.com)) during business hours and emergency On Call Support 24/7.