puzzel. Solving Customer Interactions

Puzzel ID for Puzzel Case Management

We are excited to announce that Puzzel ID is available for Puzzel Case Management!

> **Note**
>
> Please note that Puzzel Case Management currently only supports Puzzel ID for standalone customers.

Before Puzzel ID

Administrators will need to ensure that:

In the case that Puzzel Case Management is the only Puzzel product:

- Verify each user's email address is valid and can receive email alerts.

In the case that Puzzel Case Management is linked to Puzzel Contact Centre:

- The email address listed in Puzzel Case Management is also used as a method for matching users who already exist in Puzzel ID. This means that the users for Puzzel Case Management that also exist in Puzzel Contact Centre will need to have the same email list on their user.

> **Warning**
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> It is key that each user has a valid email address. In the case they do not, this will need to be edited by Puzzel Support after the enablement of Puzzel ID on an account.

To start using Puzzel ID

Once Puzzel ID has been enabled for your account:

- Users should use their existing PCM URL.
- Upon login with Puzzel ID, they will be prompted to create a new password via email.
- Users can set up two-factor authentication directly for their accounts

Post migration Setup

- Administrators:

Can access the Organisation Settings to configure Single Sign-On.

Can enable Single Sign-On using providers like "Entra ID" or Google, following the relevant instructions.

Should review 'User Management' to monitor user access and two-factor authentication setup.

- Direct users will be able to set up two-factor authentication by accessing their account settings following the instructions to set up two-factor authentication.

For further information on Puzzel ID please see the main Puzzel ID user guides in the Getting started section of the user guides.