Puzzel Agent Application

Puzzel is a flexible customer contact- and switchboard solution based on cloud technology. Agents can log on from any location, all that is required is a phone line (PSTN, SIP or Mobile) and an Internet connection. Optionally, agents can log on with a "Softphone" embedded in the application.

This user guide describes functionality for you as an agent, but it is not a given that your solution includes all the features. For example, you may not be able to use softphone, make outbound calls, search for contacts in certain sources, or record your calls.

Multi-channel

A Puzzel solution contains several modules and one or more queues containing requests from different channels like telephone, chat, e-mail, and social media. You can answer one or more simultaneous written requests in addition to answering phone calls.

Prioritisation of requests

The queues in a Puzzel solution can be given different priorities, and requests from the different channels can be prioritised against each other. This is defined in the administration portal by setting SLA (Service Level Agreement) threshold values for the queues. In addition, the solution allocates requests to the correct agent based on their skill and skill level, contained in the profile that you log on with.

User groups and profiles

Agents are usually grouped in different user groups, e.g. based on geography or role, and an agent can only belong to one user group. When logging on to the queues, you must choose a profile to log on with. The profiles are defined by which queues they contain, and which skill level you have on them. Agents in the same user group usually have the same group profiles but can also have separate and personal profiles. The administrator of the solution can easily manage both group- and personal profiles in the administration portal.

When there are requests in queue and an agent becomes available, Puzzel automatically allocates the request that has been waiting the longest time, relatively speaking (highest SLA-score). When more than one agent is available, Puzzel automatically allocates the request to the best agent (which has the highest SLA-score on the queue), and if all available agents are equally skilled, the one with the longest time since last offered a request is chosen.

In addition to automatically allocating requests, profiles can be set up with pick mode, meaning that agents can manually pick the requests from the queues, based on their own judgment and prioritisation.

Agent Application Layout

The layout of the new agent application is based on a status bar at the top and a tab window covering the rest of your screen. The status bar is basically where you log on to the queues with a profile, while the tab window is where your requests are received and managed (in separate tabs), and where you can see additional information like the queue overview. Inside each tab, there will be widgets containing different types of information, either related to a request, or a non-request related function.

Functionality gap between current and new Agent Applications

Be aware that there is a gap in functionality-support between the current agent application and the PAA. Check out our feature-matrix for more details.
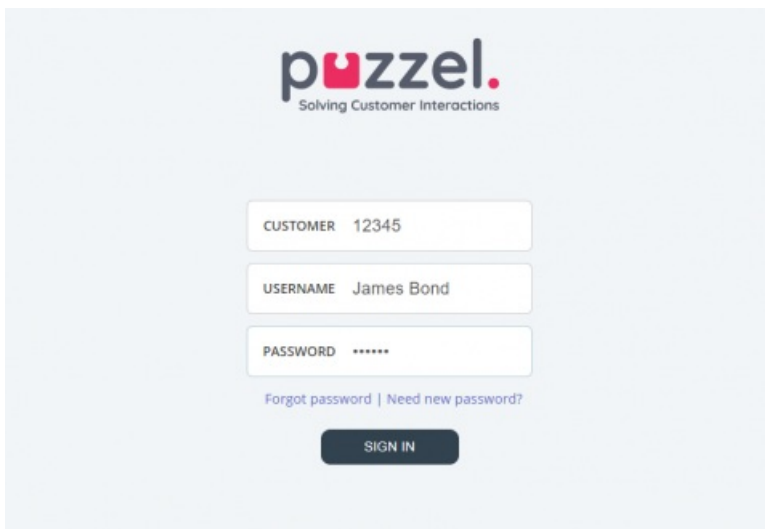
Signing in

The agent application is available through your computers internet browser on agent.puzzel.com, and does not require any installation. In general, the web application supports both PC and Mac, since it only requires an internet browser.

The agent application is also integrated with Microsoft Azure which enables SSO for all agents. If your company is using Microsoft Azure to store agent details and wish to SSO without having to enter the login details as shown in the next section, use the URL https://agent.puzzel.com?connection=azure.

Signing into the application

Open the Puzzel application in your web browser and enter your logon credentials, followed by clicking on the "Sign In" button.


Contact your administrator if you do not have these credentials. If it is the first time you log on, you may not yet have received a password. If so, just click on the *Forgot password | Need new password?* text below the input fields and follow the procedure. This function is only possible if your user account is registered with your e-mail address or mobile phone number.

If your solution is set up with two-factor authentication, you are asked to enter an additional code sent to your phone or e-mail address, if defined in your user account.

> **Note**
>
> Signing in to the application does not mean that you are logged on to queues to receive requests. You must in addition log on to the queues in order to receive requests.

After having signed in, your application should look something like this:
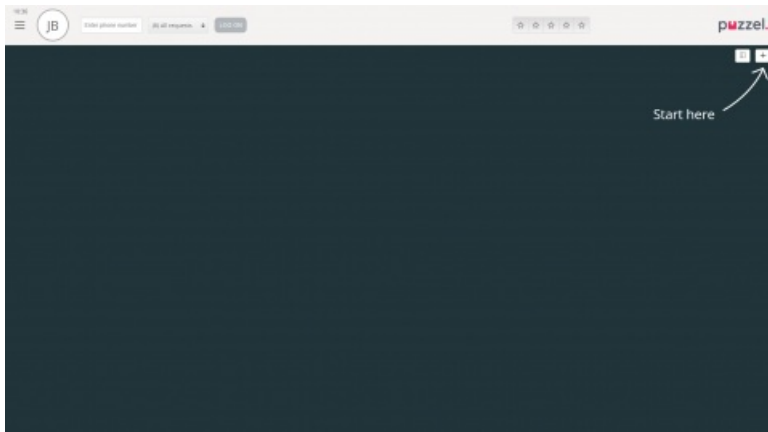
From here you can either log on to queues from the upper status bar to receive requests or follow the Start here arrow to open one or more tabs and see specific contact centre details e.g. queue overviews.

Signing out of the application

To sign out of the application, click on the menu icon in the top left corner, and chose Sign out.
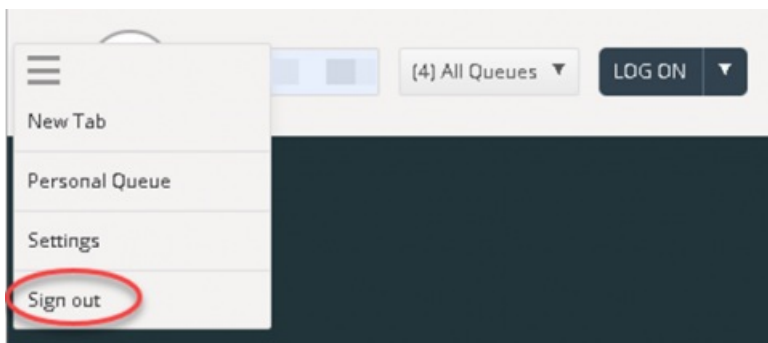
> **Note**
>
> Signing out- or closing the application does not log you off the queues and you will still receive calls to your telephone if your status was Ready when doing this. If you do not want to receive calls on your phone after signing out or closing the application, be sure to log off the queues first.

Logging on

Logging on to queues

Logging on to queues is done in the status bar at the top of the application. Depending on the features your solution is set up with, you can log on with either a phone number or with Softphone. You can log in directly in "Ready" status or directly to Pause. If your solution is set up with Pause reasons, you can choose among them.
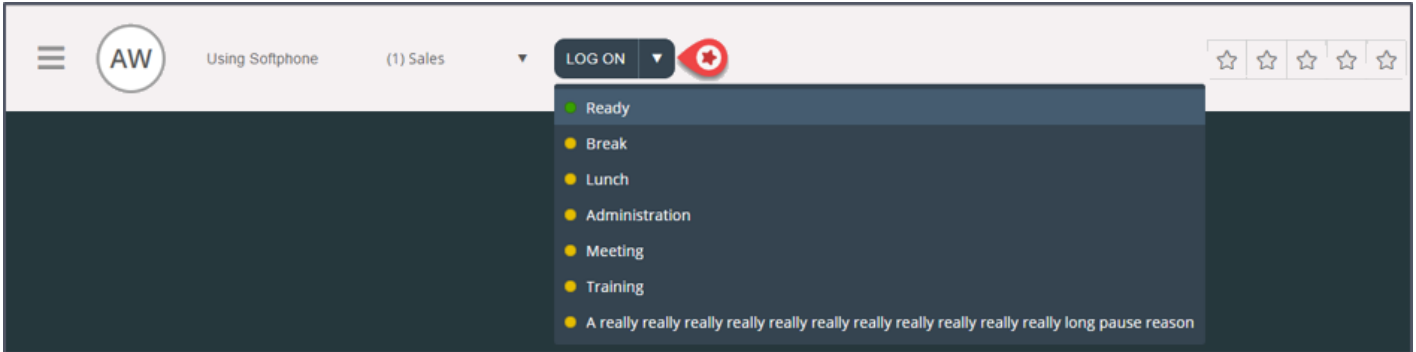

Logging on with a phone number

First, you must enter the phone number that you want to log on with and receive calls to (the application remembers the last number you logged on with). Then you must choose the profile you want to log on with, given that you have more than one profile to choose between (the application remembers the last profile you logged on with).
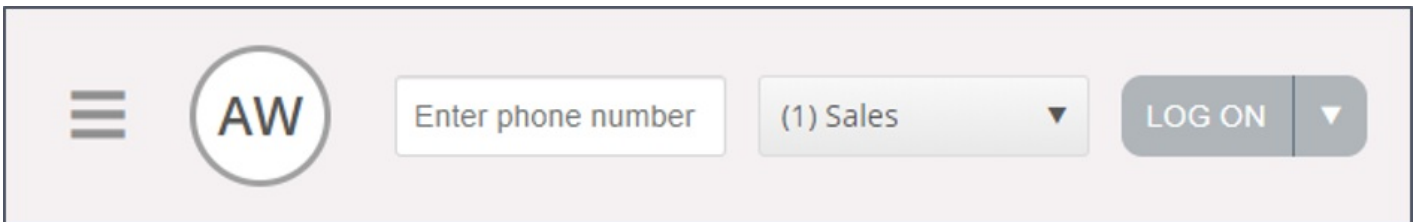

Finally, click the Log on button to become available and ready. After the login, your status field should look like this and you are ready to receive requests.
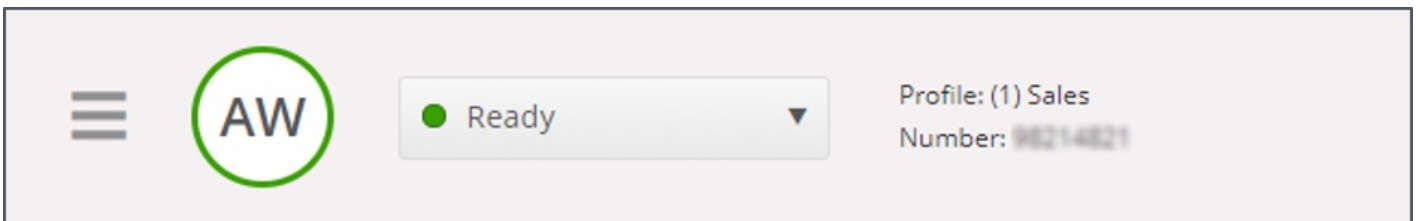
To log off the queues again, just click on the status button and choose Logoff.

> Note
>
> You will be issued a warning message if you are trying to log off or pause when there are lesser number of agents than the threshold specified.
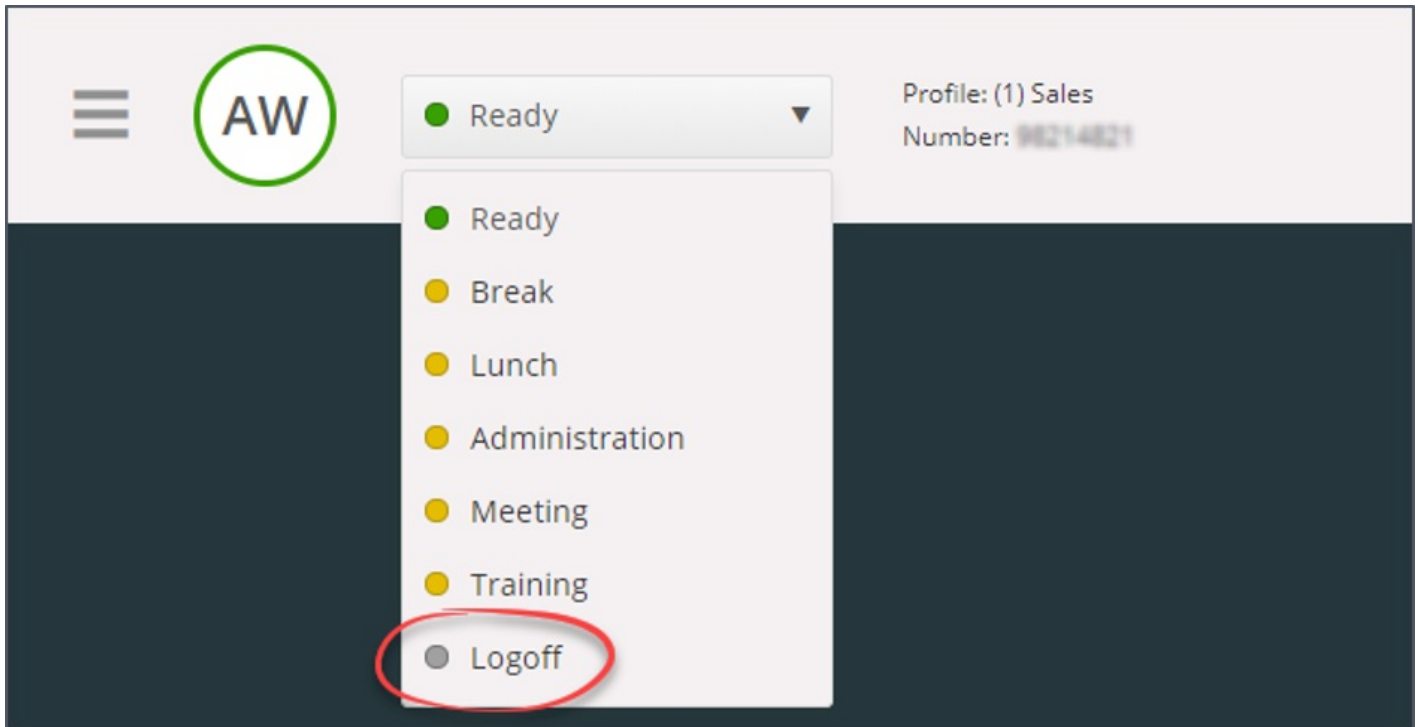
Login via your telephone (backdoor)

You can also log on to Puzzel through a telephone backdoor. This does not involve using the application, only your phone. The backdoor comes in handy if you do not have access to your application, if you have lost your internet access, or if you are out of the office. The backdoor service number to call depends on the country your service belongs to.

- **Norwegian solutions:** +47 815 11 565

- **Swedish solutions:** +46 (0)770 456 811

- **Danish solutions:** +45 70 80 75 55

- **UK and Finnish solutions:** +44 (0)203 426 5999

You can call the backdoor from any phone. When in the call, you are met by an automatic voice guide prompting you to enter the following information with your telephone keypad:

1. Enter your customer number (same as for the application)

2. Enter your agent ID (numeric ID defined in your user account)

3. You are logged off/on/in pause (current status is read out to you)

4. Press X to log on/off/pause (menu choice dependent upon your status)

5. Enter profile number (only if you log on and you have more than one profile)

6. Enter your telephone number (only if you log on)

After each statement, you must confirm by pressing the # button on your telephone key pad.

Logging on with Softphone

With Softphone enabled, you can choose between logging on with a phone number or Softphone, in the Softphone section in the Settings tab. In addition, you can define which devices to ring on when receiving Softphone calls. In addition to ringing on your headset, you may want to activate ringing on your PC speakers (in case you are not wearing your headset).

Note

Softphone calls utilise the audio device defined in your browser and operating system.
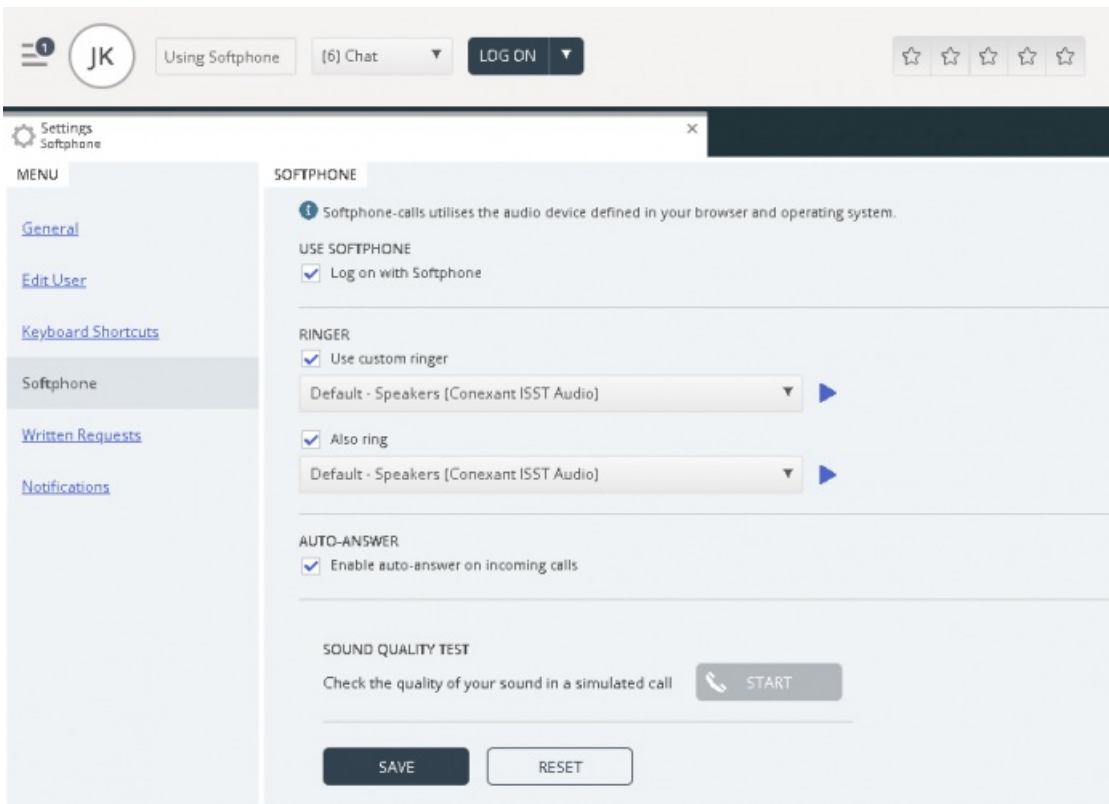
When the "use Softphone" checkbox is checked, you will log on to queues using Softphone, and you will receive all calls on your computer's headset.
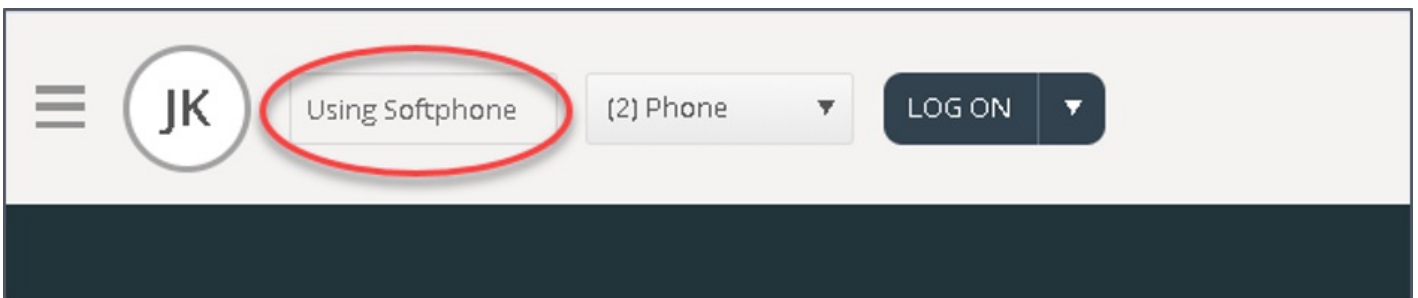

To see all sections on logging on, see the list below:

- [Agent status](#)

Agent status

The status button shows the status you have right now, and can be one of these:

| Agent Status	Description
Ready 🟢	You are logged in and ready to receive requests.
Connecting 🔴	Puzzel has sent you a phone request but you have not yet accepted it.
Connected 🔴	You have accepted a phone request and are in a conversation.
Wrap-up 🔴	Puzzel changes your status to Wrap-up for X seconds (configurable) after you have ended a call. You can change your status to Ready whenever you want.
Busy 🔴	If your phone gives out a busy tone (you are on an outgoing call/ someone called you one your direct phone) or you have rejected a request (email, social media etc.) your status will change to Busy. You will have this status for x seconds (customizable - normally set to 0-30 seconds) and then your status will automatically change to "Ready". Your status will also change to "Busy" if you have reached the limit on how many chats you can answer simultaneously.
No answer 🔴	If you do not answer a request from a Puzzel queue or an agent before X seconds (configured by your administrator) your status will automatically change to No answer. You have this status for X seconds (normally 1-30).
Pause 🟠	Agent is logged on, but is in pause (with or without a pause reason).

It is only when in Ready status you can receive phone requests from the queues you are logged on to.

If you need a break while logged in, choose the "Pause" status or one of the pause reasons (optional). When in pause, you are not offered any calls or written requests.

Status for written requests

Since the statuses Connecting, Connected, Wrap-up and No answer do not apply to written requests (chat, e-mail, and social), you can receive them based on your (separate) settings for written requests. The number in parentheses in the status button shows how many written requests you currently are engaged in.

Your status will change to "Busy" if you have reached the limit on how many written requests you can simultaneously be engaged in.
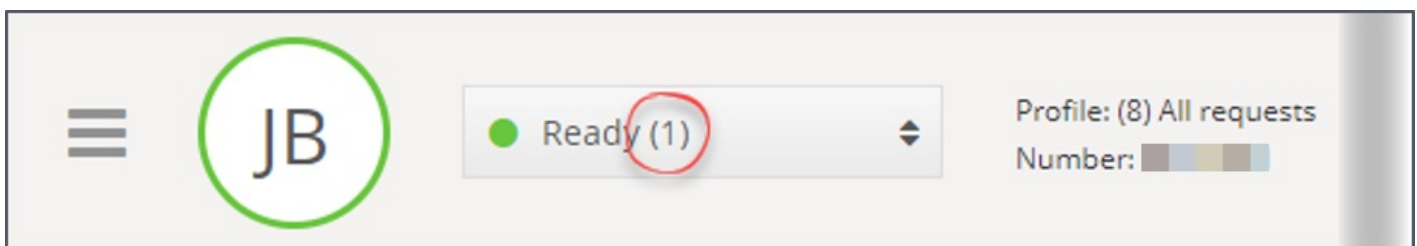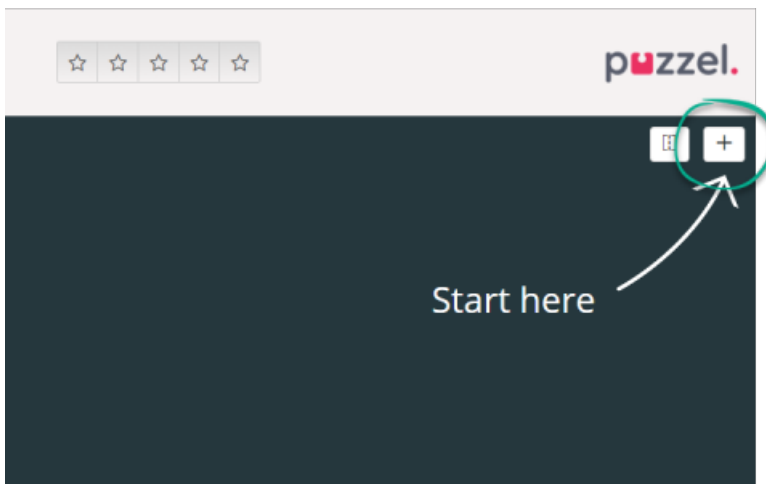
Tabs

The main area of the agent application is dedicated to display one or more tabs, each containing one or more widgets. Tabs that are developed by Puzzel to support our basic functionality are defined as core tabs, while tabs that are developed by an external party (e.g. your company or a third party developer) using our APIs are defined as custom tabs. Custom tabs are not described in this document.

We have two main types of core tabs:

Function tabs - Typically a "passive" tab that shows information that is not necessary related to a specific request. Examples of function tabs are "Queue Overview" and "Ticker". Function tabs are usually kept opened throughout the day but can also be opened and closed by the agent based on the current need for information or functionality. Function tabs are available in the tab menu found under the "New Tab" button in the upper right corner. Normally, you cannot open more than one function tab at a time.

Request tabs - Tabs that automatically open and close when you receive an incoming request and are otherwise not available in the tab menu. Examples of Request tabs are "Phone", "Chat", "E-mail" and "SoMe".

It is through these tabs your requests are offered and managed, and where you can see additional information like Settings and Queue Overview. Request related tabs (phone calls and web chats) appear automatically when you are offered a request and cannot be opened manually. On the other hand, non-request related tabs are opened manually through the New Tab button in the top right corner, opening the tab-menu.

From the tab menu, you can click on a tab to open it. If a tab is already opened, it is slightly darkened in colour. Choosing an already opened tab doesn't open a duplicate tab, but takes you to the already opened tab.
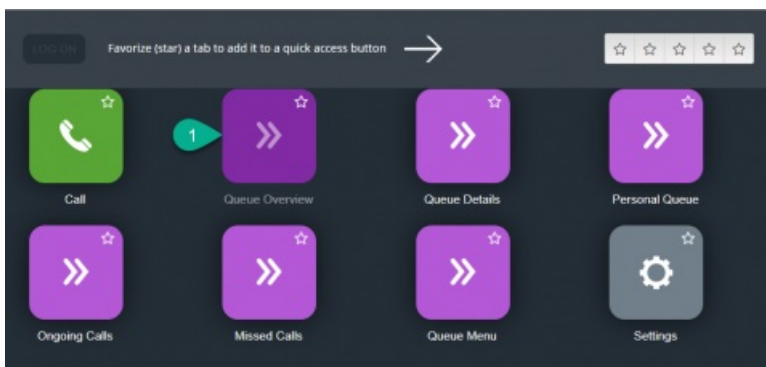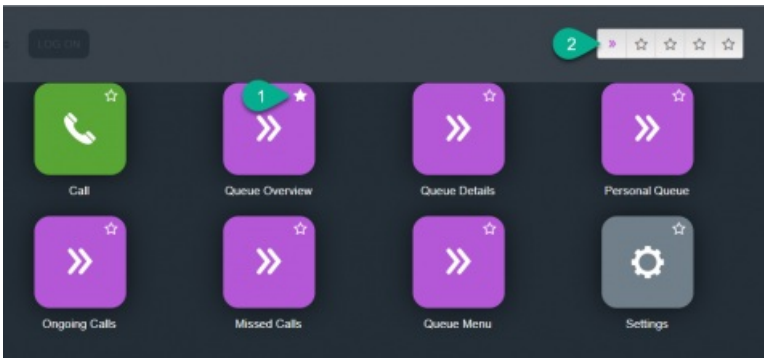

Quick Access buttons

For easy access to your most used non-request related tabs, you can favourite up to 5 tabs to make them available through a quick access button in the status bar. When clicking on an empty quick access button (with a star icon) you are taken to the open a new tab menu.
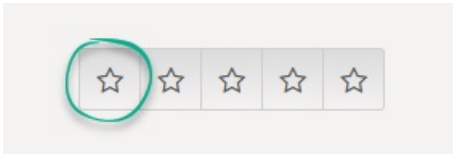
By clicking on the star symbol in the tab icon, you favourite it, which adds the tab to the next available quick access button.

You can rearrange the quick access buttons by dragging and dropping them to the desired order.

Split and merge tab-sets

As a default, all tabs are shown beside each other in one set of tabs. However, you can split the screen into two tab-sets in order to distribute your tabs among them. This enables you to see up to two tabs simultaneously and get a better overview. As an example, you can look at the queue overview in one tab-set, while handling a request in the other tab-set.

As default when splitting tab-sets, all tabs are shown in the right tab-set, but it is possible to move them (by dragging) to the left tab-set. For a better overview, it is recommended that functional tabs are dragged to the left tab-set. For a better overview, it is recommended that functional tabs are dragged to the left tab-set since request tabs always are opened in the right tab-set. You will then be able to see e.g. the queue overview tab in the left tab-set and a request tab in the right tab-set, at the same time.

The application remembers if a certain function tab was shown in the left or right tab-set the last time the tab-sets were split.

10:18

AW ● Ready (0+) ▼ Profile: (B) All requests
Softphone: Online

» ☆ ☆ ☆ ☆

puzzel.

» Queue Overview ✕ | Ticker Agent ✕ | ✉ Demo E-mail andreas.wallin@puzzel.com

REQUEST

QUEUE OVERVIEW

Queue Name	In Queue	Max Wait Time	Agents	●	●	●
› Chat Sales	0	0s	1	1	0	0
› Chat Support	0	0s	1	1	0	0
› Email	8	2d	1	1	0	0
› Facebook	0	0s	1	1	0	0
› Twitter	0	0s	1	1	0	0
› Outbound	0	0s	1	1	0	0
› Dialer Q1 (Preview)	0	0s	0	0	0	0
› Email Transferred	0	0s	1	1	0	0
› Email Personal	0	0s	1	1	0	0
› Dialer Q2 (Predictive)	0	0s	0	0	0	0
› Dialer Q3 (Preview)	0	0s	0	0	0	0
› 1. Sales	0	0s	1	1	0	0
› 2. Support	0	0s	1	1	0	0
› 3. Switchboard	0	0s	1	1	0	0
› Sum phone	0	0s	1	1	0	0
› Cention Email	0	0s	1	1	0	0

✉ New e-mail request

FROM
andreas.wallin@puzzel.com

TO
product@demopuzzel.com

SUBJECT
Test 1

QUEUE
Demo E-mail

✓ ACCEPT   ✗ REJECT

Contacts Tab

The Contacts tab is where you can find your contacts to see their status and details, send messages, or make outbound calls. You can send a message or make an outbound call to a given phone number, an available agent, or a contact in one of the contact-sources available in your solution. When sending a message or making a call, you must first choose among your available search sources (irrelevant if you are entering a given number to call).

To send a message you must click on the Send Message button (requires a setup)

To make an outbound call you must be logged on. When a call is initiated, a new Callout tab is opened. The system will first call you upon the number you are logged on with (or your Softphone if logged on with that). When you are connected, the system will call the number/agent/contact you want to call.

When in an outbound call, most of the call handling functionality is similar for an incoming call. See the following chapters Receiving a call and Making a call for further details.

To call a given number

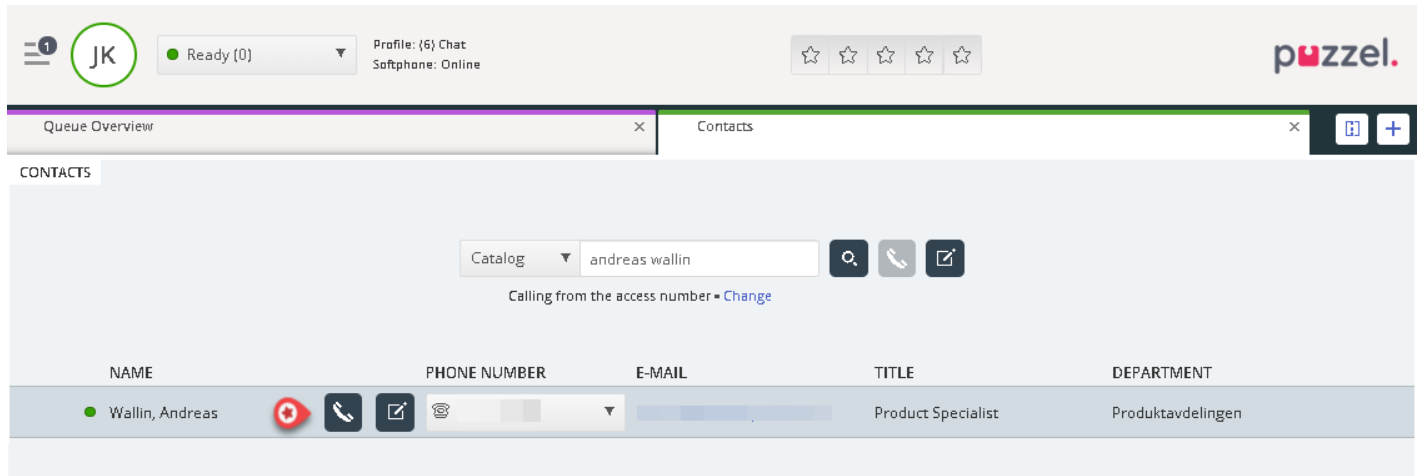Chose any search source, enter the number you want to call and click on the call button.
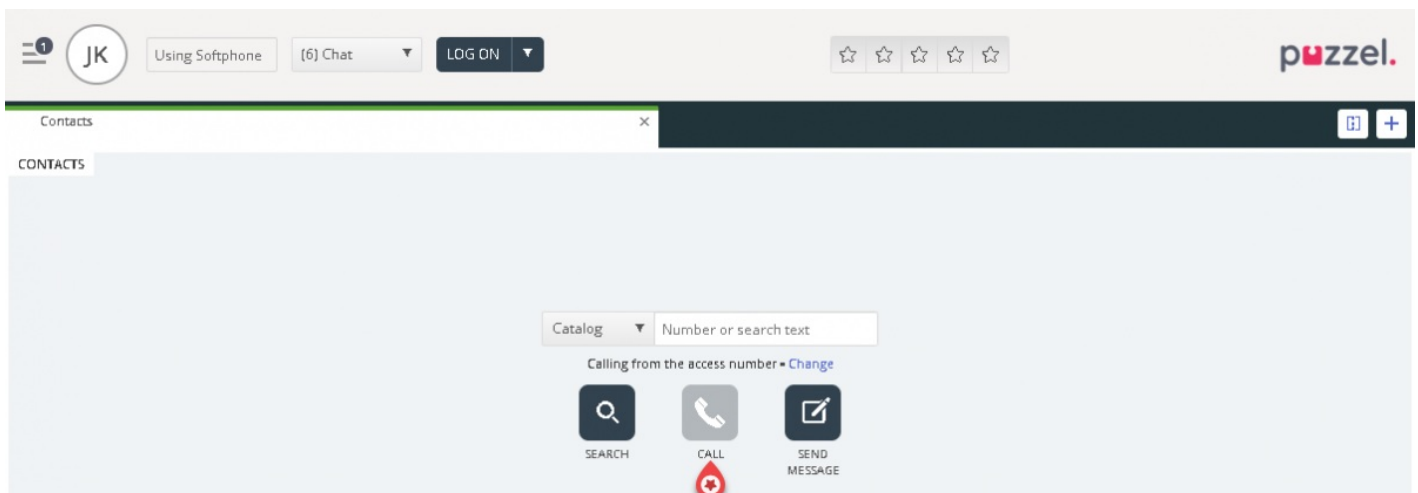
To call an agent

Choose Agent as a search source, enter the name of the agent you want to call, and press enter or click on the search button. You will now see the result of your search. Choose the relevant agent from the list (if more than one hit) and click on the belonging to call-button.
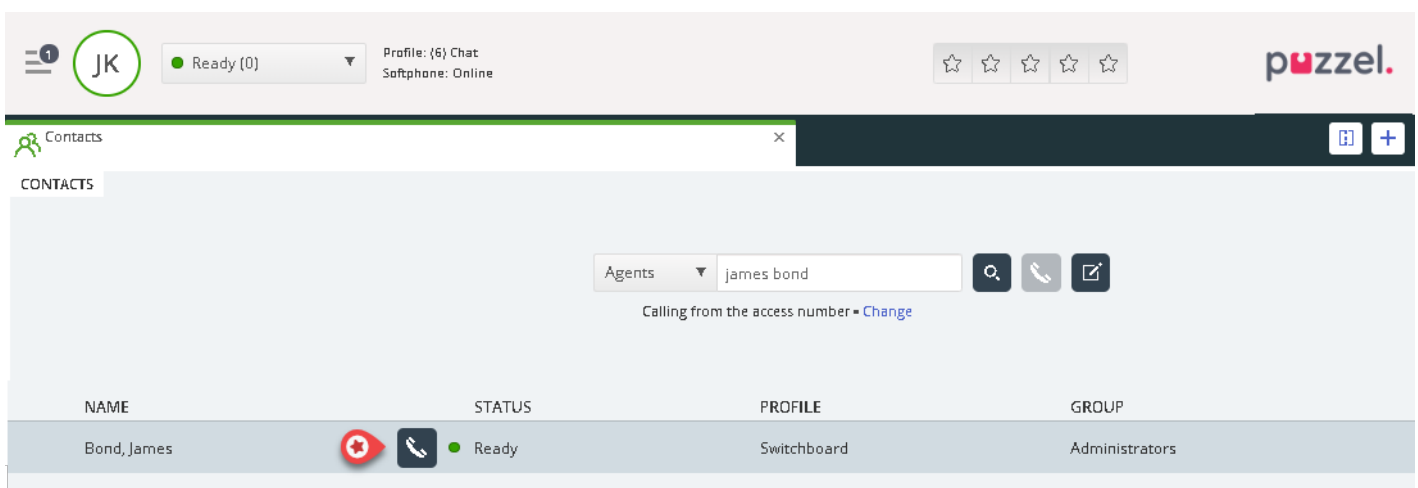
To call a contact

To call a contact (not an agent), choose the relevant search source ("Catalog", "Skype for Business" or "Customers") and enter your search criteria followed by pressing Enter or the Search button. You will now see the result of your search. Choose the relevant agent from the list (if more than one hit) and click on the belonging to call-button.

You can also add/edit/delete an event for contacts in a catalog search source if you are allowed access by your admin.

> **Note**
>
> Events synced from Microsoft Exchange cannot be edited or deleted.

Send a message

A message can be sent as an SMS and/or e-mail as long as you have access. Both are optional features that require separate setups. If you don't have access to send either SMS or e-mail, the "Send message" button is hidden.

> **Note**
>
> You still can send e-mails to contacts registered with an e-mail address by clicking on the addresses in a search result. This will open your default e-mail application and is not sent through Puzzel.

To send a message to a given number or e-mail address, you can click on the "Send message" button in the Contacts tab and enter the phone number and/or e-mail address, together with the message. You can also search for a contact and click on the belonging to "Send message" button.

If you have access to both send messages as SMS and e-mail, you can choose to send the message as one or both.

When in an incoming call, the "Send message" button will also appear in the calls request tab.

Queue Overview tab

The Queue Overview tab gives you an overview over the queues related to your solution. You can click on the bold numbers in the table to see detailed information about the customers in queue and the agents logged on.

Your administrator can apply filters on your user to limit the queues visible, so there may be queues in the solution that are not shown in your overview.

Queue Details tab

The Queue Details tab gives you an overview over the requests in all queues from your queue overview. If you have enabled the "pick" feature, you can pick requests from the overview to allocate them to yourself, using the "Pick request" button.

Personal Queue tab

The Personal Queue tab shows requests (calls and e-mails/e-tasks) put in your personal queue by either yourself, other agents, or an external system. From here you can pick and release requests manually, in case they are not pushed to you automatically. As long as you have one or more requests in your personal queue, a notification is shown in the top left menu. From here you can easily access the personal queue tab.

Ongoing Requests tab
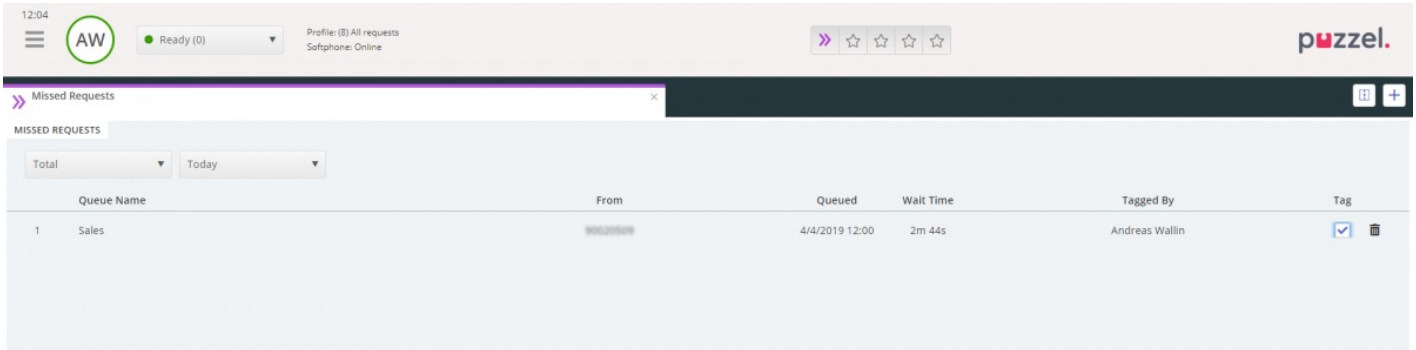
The Ongoing Requests tab gives you an overview of your queue's ongoing requests, meaning requests that agents are currently engaged in.

Missed Requests tab

The Missed Request tab shows a list over requests that are missed by the queue, meaning that the customer has ended the request while waiting in the queue.You can tag a missed request to yourself with the rightmost checkbox so that other agents see that you are planning to handle it. Tagging a missed request does not automatically allocate it to you, you must contact the customer manually.

Ticker tab

The Ticker tab gives you an overview per queue over your work load and request handling achievements so far this day and this week. It also lets you see details about your login and pause time for the same periods.

	LOGGED ON	IN PAUSE	OFFERED	ANSWERED	ANSWER %
	0s	0s	0	0	

Queue	Offered	Answered	Answer %	Avg. Speak Time	Avg. Wrap-up Time	Avg. Handling Time
Chat Sales	0	0		0s	0s	0s
E-mail Sales	0	0		0s	0s	0s
Sales	0	0		0s	0s	0s
SocialCee Facebook	0	0		0s	0s	0s
SocialCee Twitter	0	0		0s	0s	0s
Support	0	0		0s	0s	0s
Switchboard	0	0		0s	0s	0s
Utgående	0	0		0s	0s	0s
Total	0	0		0s	0s	0s

My Log tab

The My Log tab gives you an overview over your last 50 answered incoming and outgoing requests, for the last 30 days. Unanswered requests and missed calls are not shown. For requests from voice and e-mail/e-task channels, you can call or e-mail the customer back. At the top, the average enquiry duration is shown per relevant channel.

Scheduled Calls tab

The Scheduled Calls tab gives you an overview over calls that are scheduled in the future. It is not a default available tab but must be activated from the Admin Portal by your administrator or by Puzzel. Scheduled calls can manually be set up in this view, or it can be initiated as a re-scheduling of a current dialler call (set up in the dialler call's enquiry registration). In the table showing scheduled calls, you can see which entries that are added as a re-scheduled dialler call through an icon in the leftmost column.

In the table, you can click on the rightmost "details" button to see more information about the entry, or you can delete the scheduled call.
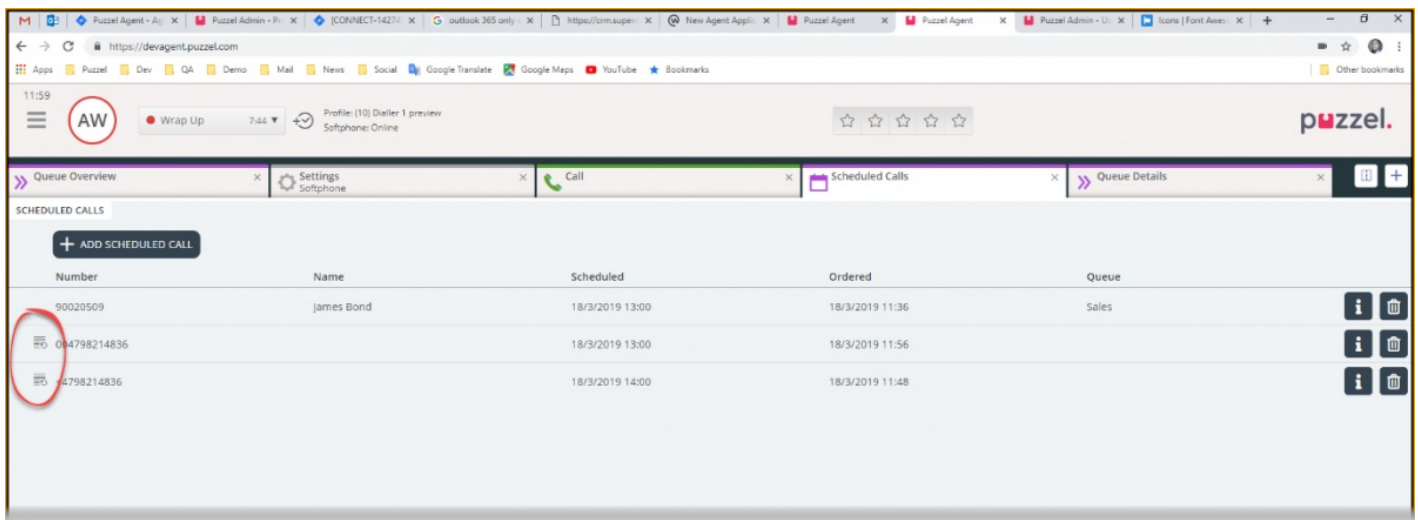
Adding a scheduled call

For adding a scheduled call, click on the "Add Scheduled Call" button and fill in the fields before clicking on the "Schedule" button.

What happens at the rescheduled time

If you schedule a call or reschedule a dialler call to be executed at e.g. Wednesday at 1500, it is shown in your Scheduled Calls tab from the time you ordered it until Wednesday at 1500. At the (re-)scheduled time, the call i changed to be shown in your personal queue. The call is reserved to you for as long as defined, either in the dialler configuration or in the general settings.

When a scheduled call is offered and you answer it, the contact is called, and you are both connected.

- If you're ready at the scheduled time, the call is offered to you right away

- If you are logged on to a queue but not ready, the call waits for you in the reserved time. If you are not ready within the reserved time, the call is offered another agent.

- If you are logged off at the scheduled time, the reservation is cancelled and the call is offered another agent on the relevant queue

Settings tab

In the Settings tab, you can change details and settings for your account and application.

Enquiry Registration

Here you can decide if your categories should be collapsed by default, instead of being expanded. If you have many categories or topics, this will probably make your registration easier and faster.

Edit User

Here you can edit relevant information about your user account in Puzzel. You can change your name, email address and mobile number (if given access), and you can change your password and language settings.

Keyboard Shortcuts

Puzzels agent application is based on tabs and widgets. Hence, we have split our keyboard shortcuts in a similar way:

- Application Shortcuts
- Widget Shortcuts

Application shortcuts are general shortcuts used independently of tabs and widgets in use. Widget Shortcuts are used particularly on widgets in tabs and are only relevant when the widget is in use.

Below is a table of Application shortcuts.

Action	Shortcut Key
Answer Softphone call	Alt+A
Reject Softphone call	Alt+Z
Hangup Softphone call	Alt+H
Add Tab	Alt+0
Open Favourite tab #1	Alt+1
Open Favourite tab #2	Alt+2
Open Favourite tab #3	Alt+3

Action	Shortcut Key
Open Favourite tab #4	Alt+4
Open Favourite tab #5	Alt+5
Focus on the First Tab in Left Tab-set	Alt+6
Focus on the first tab in right Tab-set	Alt+7
Split / Merge Tab-sets	Alt+9
Set Ready (when in pause, no answer, busy or wrap-up)	Alt+I
Toggle Logon	Alt+L
Focus on Status / Profile	Ctrl+Alt+L
Toggle Pause	Alt+P

Below is a list of widget shortcuts

Phone Widget:

Action	Shortcut Key
Hang-up (non-softphone calls)	Ctrl+Shift+H or Alt+H
Hold/Unhold	Alt+M
Recording	Alt+R

Action	Shortcut Key
Start/stop censor recording	Ctrl+Shift+X
Forward	Alt+T
Transfer	Alt++
Start/stop Consult call	Alt+-
Send Message	Ctrl+Shift+.

Call Widget:

Action	Shortcut Key
Focus on Search Field	Alt+S

Softphone

Here you can enable/disable softphone and set softphone parameters.

Ringer

In Ringer, you can define where you want softphone calls to ring. Usually, agents choose their default headset for this. You can also define where you want softphone calls to ring additionally. Usually, agents choose their PC speakers for this, so that they can hear calls also when not wearing the headsets.

Auto-answer

With auto-answer, you can enable incoming calls to be auto-answered. When enabled, you will hear a short sound when receiving a call, to prepare you for the conversation about to take place.

Sound quality test

If you are uncertain of how you sound during a softphone conversation, you can perform a test call. When starting a test call, you are prompted to record a short monologue that you can listen to straight after. Just follow the instructions and check how you sound. This feature requires you to be logged off queues.

Written Requests (chats, emails and social requests)

Here you can decide in pressing Enter/Return on your keyboard should result in the message being sent or the cursor being navigated to the next line. If this option is checked, you can still navigate to the next line by pressing Shift + Enter, when writing a message. This is relevant for chat- and social requests.

Notification

Here you can see and edit settings for playing sound and showing notification (toaster) for incoming requests. Note that there are notification-time limitations in the browser that override the toaster display time in these settings.

Knowledgebase tab

The knowledgebase tab can be used to seek information on a product/service. You can casually flip through the top-rated articles to enhance your knowledge while on a break or look for relevant articles during customer interaction. The top articles are always listed in the centre panel when the tab is first opened.

> **Note**
>
> This tab is only made available if you have subscribed to the Agent Assist knowledgebase package.
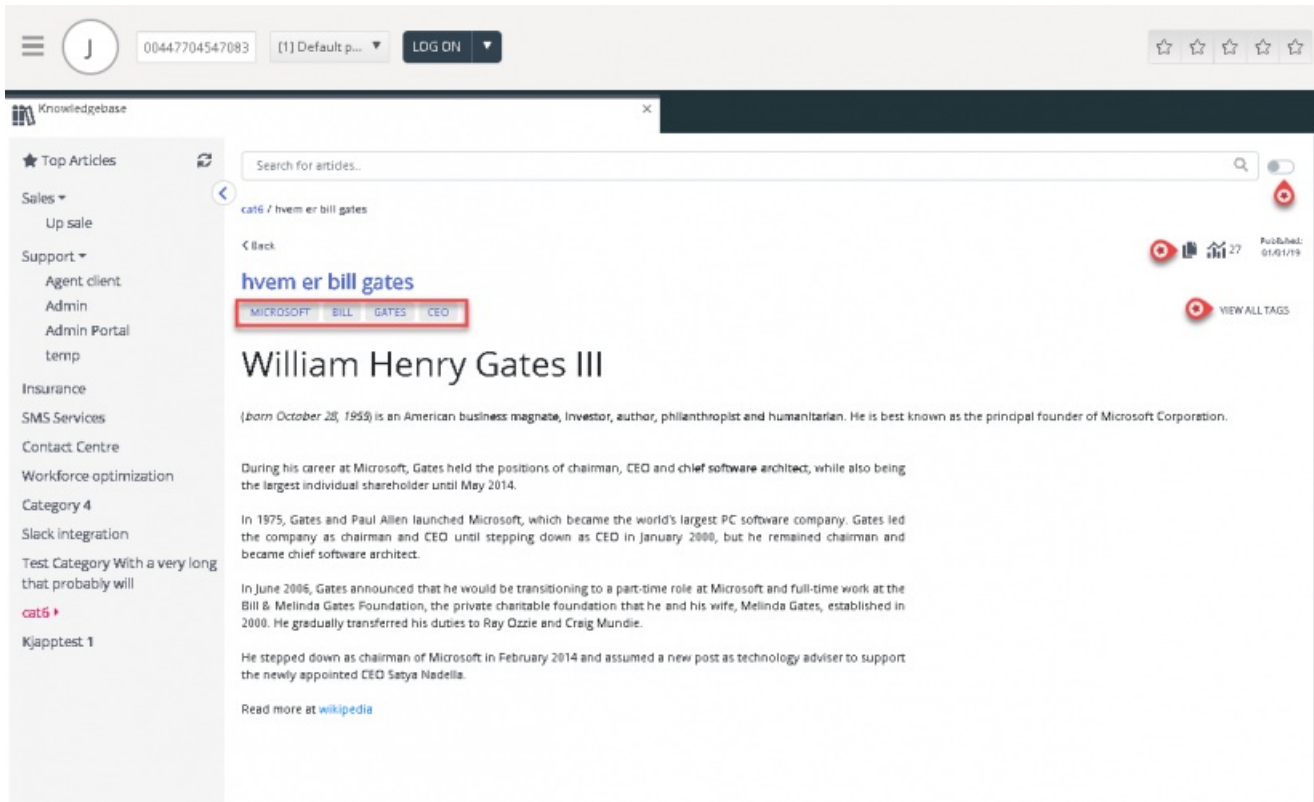
For any incoming request, the articles are automatically skimmed based on queue the request is coming from and you will be presented with all relevant articles associated to the queue. You can also manually search for articles under a category/section. By default, auto search is turned on.

It is possible that an article can have numerous diverse tags attached to it, a couple of which are displayed at the top. You can get a complete view of all the tags by clicking on the **VIEW ALL TAGS** option on the right.

The contents of the article can also be copied into a clipboard for it to be used elsewhere or stored locally by clicking on the icon on the top right corner of the article.

The article containing the attachments will have an attachment icon with the number of attachments available for the article at the top.

You can see a list of all attachments available by clicking on the icon. You can either download it or copy the link to send it to yourself or to the customer. There is also a related articles section at the bottom of the article if other articles in the Knowledgebase has been linked to it.
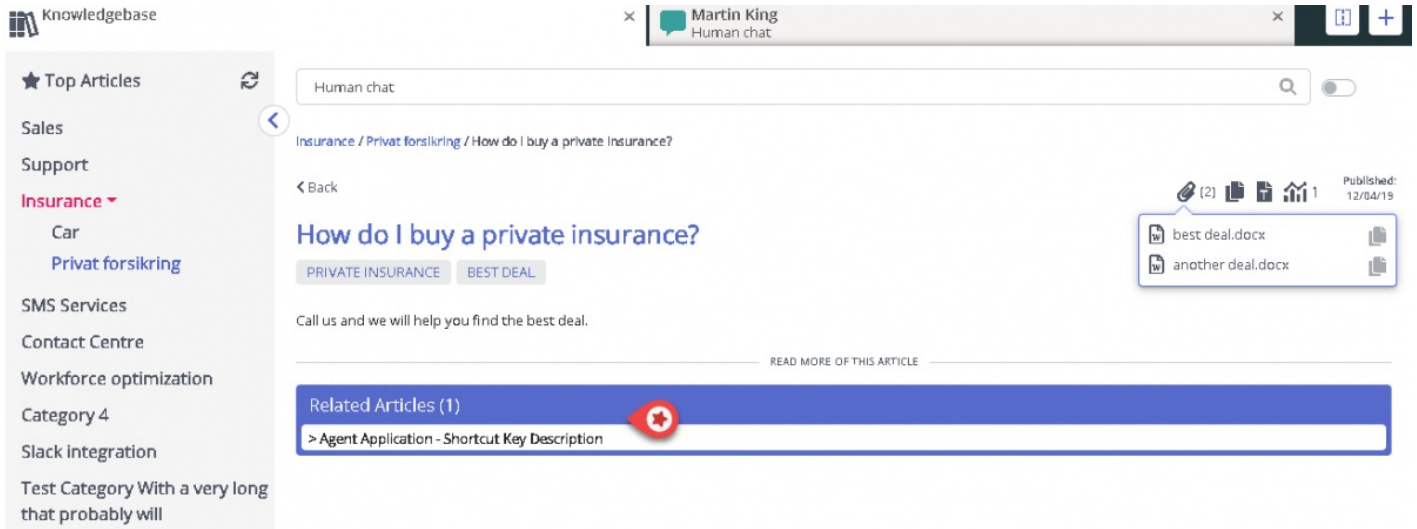
The agents can also send article suggestions to the admins to be included in the Knowledgebase Management System by pressing the icon next to the search bar. This will bring up suggest article window where you can enter the title and content for the article as shown in the picture below.

Click on Send to see a sent confirmation dialog box.

Scheduled tasks tab

Scheduled tasks tab provides a comprehensive scheduling functionality for assigning tasks to yourself, to other agents or to a queue.

In the Scheduled tasks tab, you can:

- add a scheduled task into your Puzzel calendar (max 60 days in the future)

- add a scheduled task in another named agents Puzzel calendar

- add a scheduled task to any agent on a selected task queue
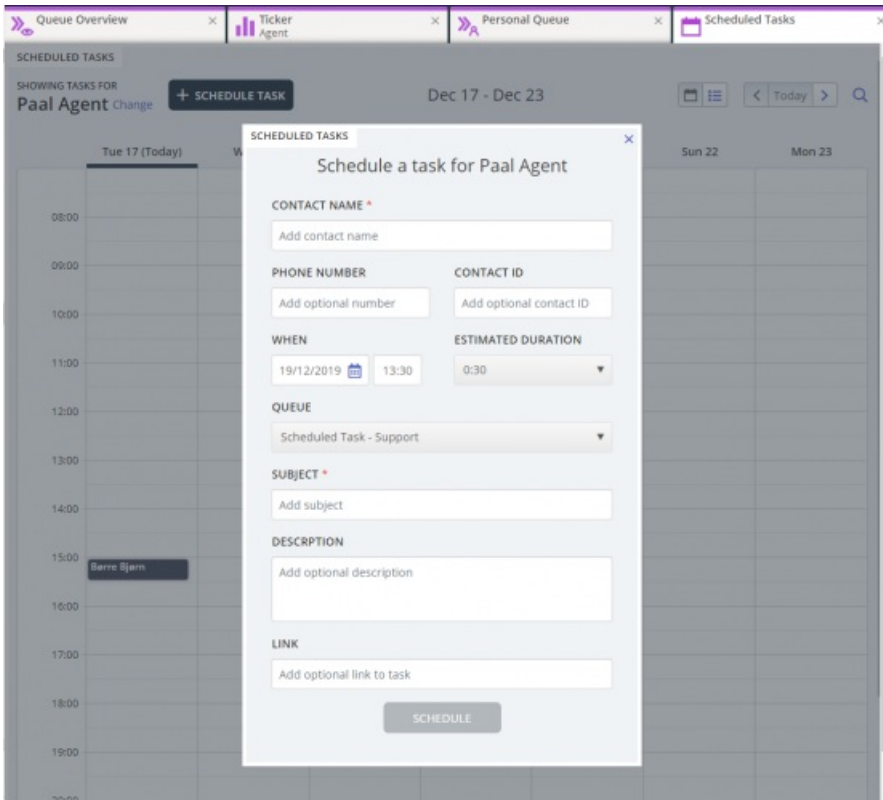
You can always add a scheduled task into your calendar and later edit/delete it, if needed. Scheduled tasks can also be looked up using the search functionality. The new *Scheduled task calendar* tab looks like this:
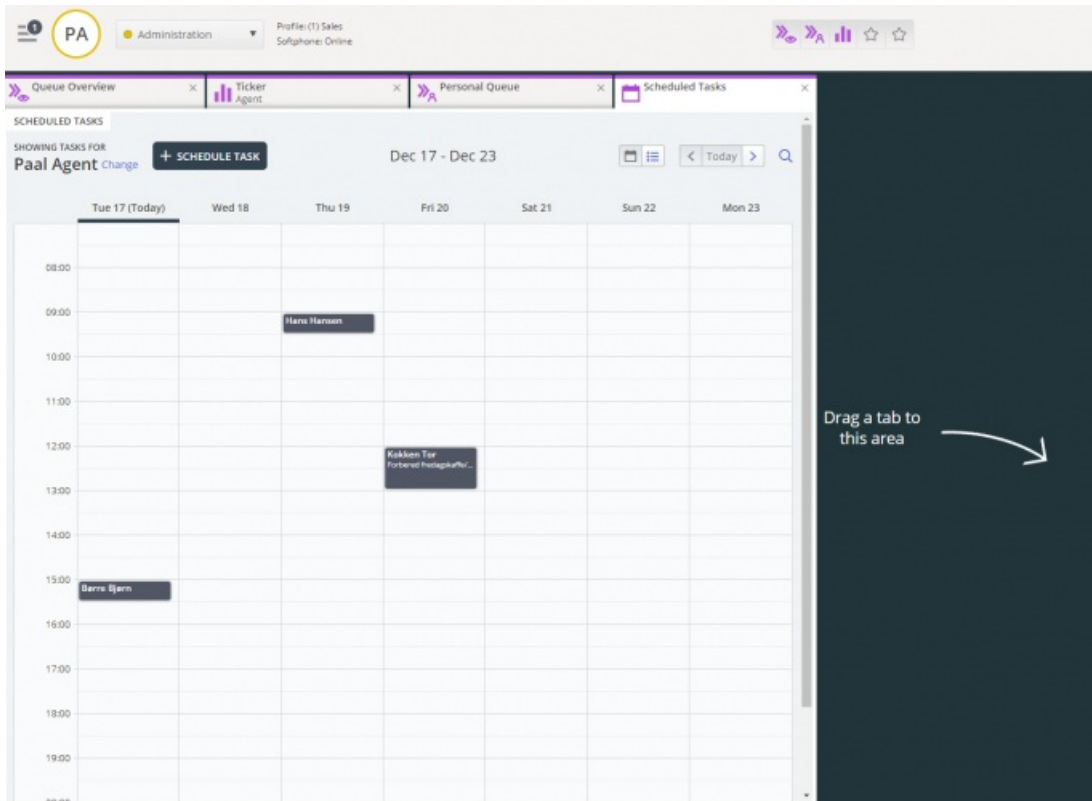
All scheduled tasks are shown in the**Scheduled** column *of* the Queue overview tab for the relevant queue until the tasks scheduled time. It is then sent as a request to you if you are logged on and have the capacity to receive it. The task is now removed from your Scheduled task calendar and placed in your personal queue until you accept the offered task request.
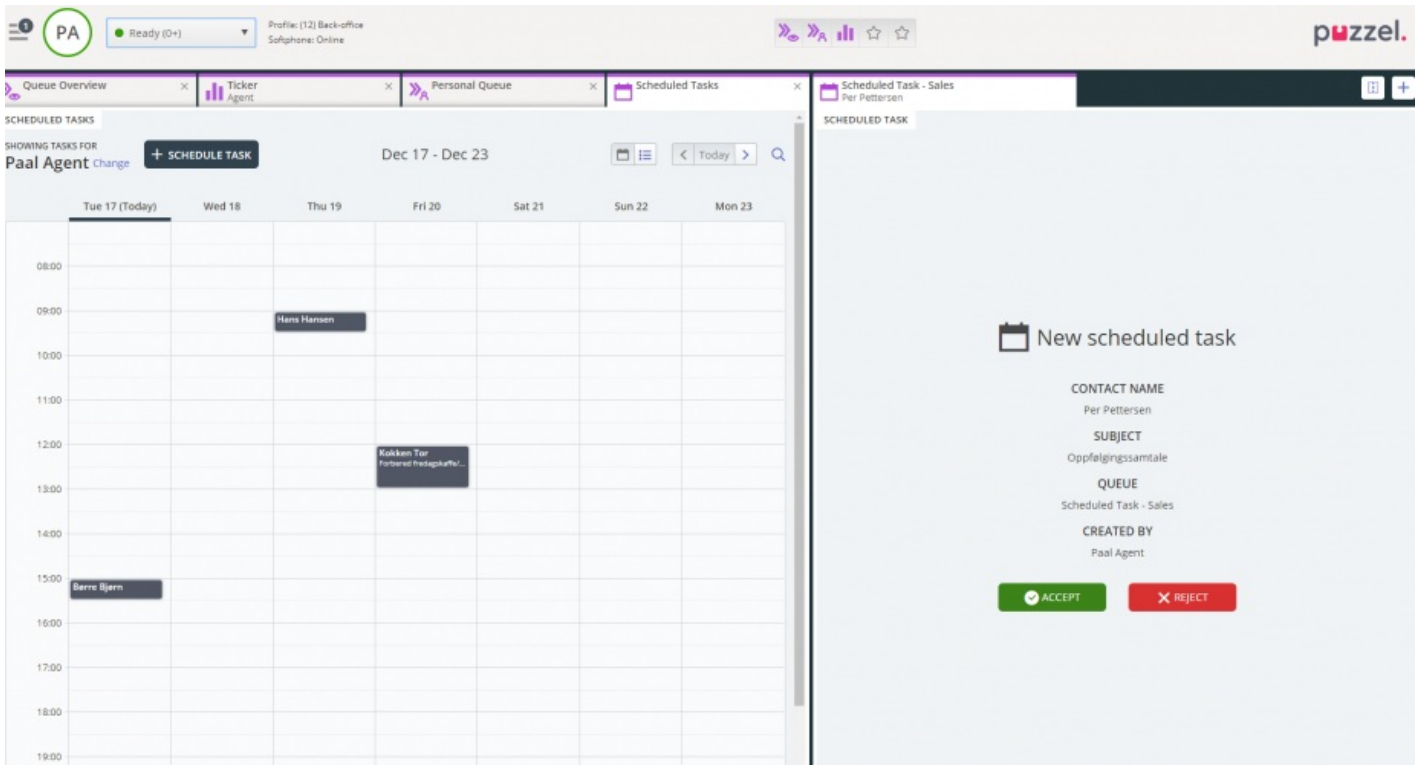
The task will be reserved for you for a pre-defined time of 60 min(configurable). If you are not available or haven't accepted the task within the reserved time, another agent in the same queue will be offered the task.

If you choose to accept the request, you will be presented with the task details and can start working on it. If the task included making outbound calls, you can plan to make calls when you have read the details about the task. Once the task is done, close the task request tab in the agent application.
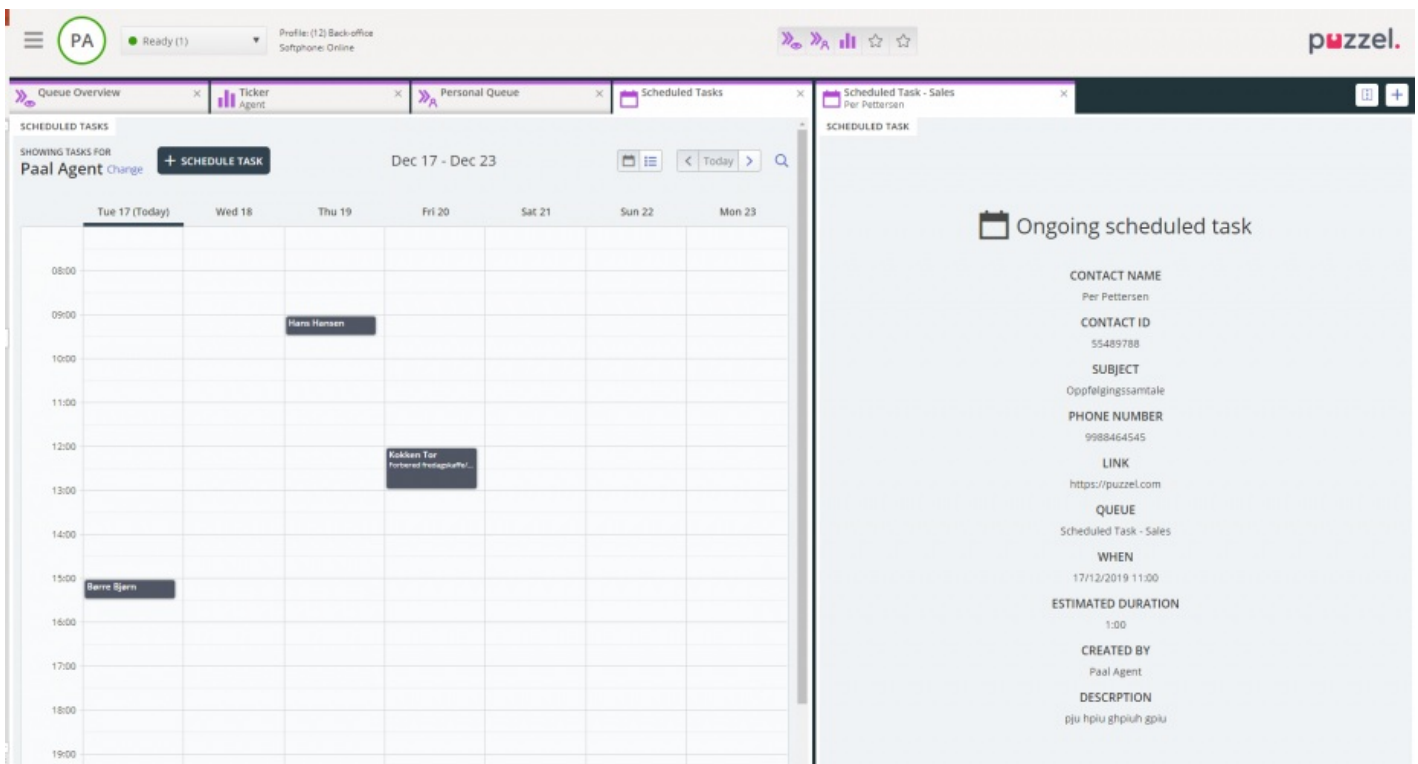
If you wish to do a task scheduled for a future time, you can reschedule it to say, one minute and the accept it when it is offered to you.

If the supervisor or you click on the release request icon for a task in the Queue details view before the reserved time has ended, the request might be sent to another agent immediately.

Receiving a call

In order to receive calls, you must be logged on with a profile that gives you requests from one or more phone-queues. When being offered a call, the Call tab will automatically appear, and your status is changed to "Connecting". The phone that youre logged on with will start to ring (setup time may vary based on operator and phone type). Answering a call is handled on the phone device.

If you are logged on with Softphone, the accept/reject button is shown in both the request tab and header area. If you have auto-answer enabled, the call is accepted automatically.

When accepting a call, your status is changed to "Connected".

If activated, you can see relevant information about the caller or the call itself in the Call Details widget. This information is customised and different for each solution. Even if the information usually is static and system based, Puzzel can collect relevant information from external sources and display them in the same widget. If enquiry registration is activated, it is also displayed in the tab, as shown in the example above.

Action buttons for call handling

When you are in a call there are a couple of action buttons you can use for different features.

Icon	Description
	HANG UP: Disconnects the ongoing call
	N HOLD: Puts the caller on hold. The caller cannot hear you when activated.
	RECORDING: Activates recording manually. Can be activated automatically on calls if set up by admin.
	CENSOR: Enables you to scramble an ongoing recording so that sensitive information is not perceived. Only active during a recording.
	FORWARD: Enables you to transfer a call with or without consultation.
	KEYPAD: Enables you to enter DTMF tones when in a Softphone conversation.
	MESSAGE: Enables you to send outbound SMSs and/or e-mails to recipients. Note that sending messages requires a setup (separate setup for SMS and e-mail). Without this setup, you can only send e-mails through the e-mail address links in contact search results.

Call Forwarding

When in a call, you can click on the Forward button to transfer it with or without consultation. You can choose between transferring to another agent, service node (e.g. menu or queue), catalog contact or another telephone number. If you have access to more than one search source, you will see a drop-down menu where you can choose which one to search in.

> **Note**
>
> You may not have access to search for agents, service nodes or catalog contacts, or your solution may not be set up with these.
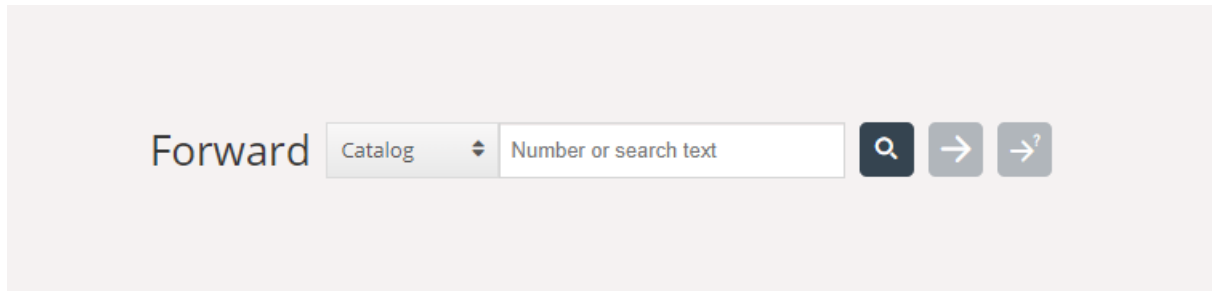
It is important that you dont transfer a Puzzel call using your local telephone system (e.g. PBX) directly, because Puzzel will not register this and will keep you connected until the transferred call has ended.

You cannot forward a call that has been started by another agent (agent to agent calling)

Transfer a call without consultation

If you know the number you want to transfer to, you can enter it in the input field and click on the transfer button (arrow without question mark).
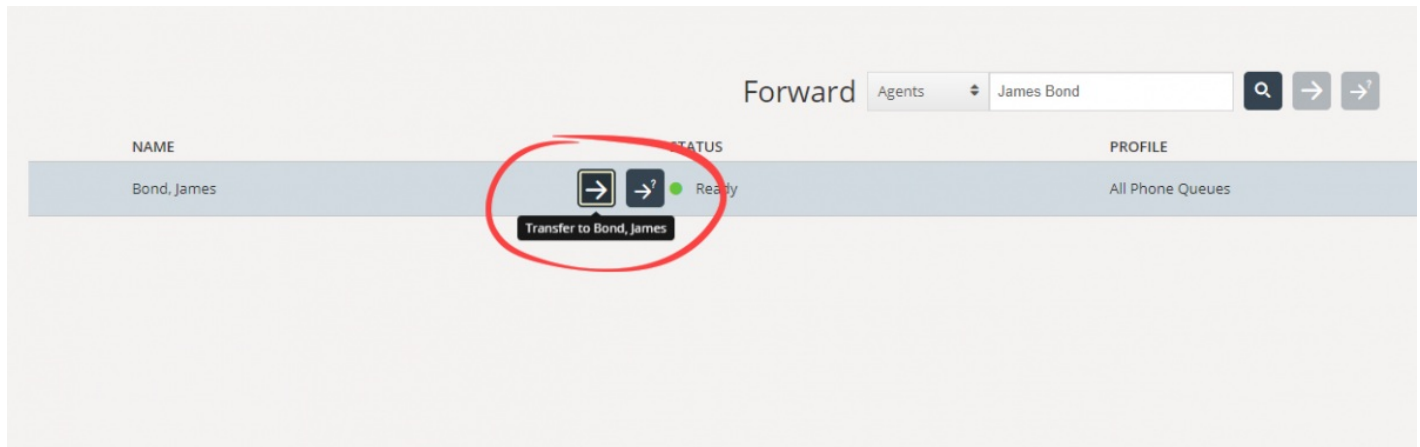
If you want to transfer the call to another agent, service node, or catalog contact, enter the name of the agent, node or contact that you want to transfer the call to, and click on the search button. Any hits on your search is displayed in the search result. You can now choose to transfer the call by clicking on the transfer button (arrow without question mark) next to the relevant name in the search result.

You can only transfer a call to agents who are logged on and available, and you can only search for and transfer to service nodes when you are in a call.

Transfer a call with consultation

In addition to transferring a call without consultation, you can also make a consultation call. A consultation call enables you

to first talk to the transferee (third party) yourself, while the caller is automatically put on hold. You can make a consultation call merely to consult with the third party, but also to make sure that the third party is available and informed before transferring the call.

If you know the number you want to make a consultation call to, you can enter it in the forward input field and click on the transfer button (arrow without question mark).

If you want to consult with another agent, service node or catalog contact, enter the name of the agent, node or contact that you want to consult with, and click on the search button. Any hits on your search is displayed in the search result. You can now choose whom to consult with by clicking on the consult button (arrow without question mark) nex to the relevant name.

> ## Note
>
> You can only consult to agents who are logged on and available, and you can only search for and consult to service nodes when you are in a call.
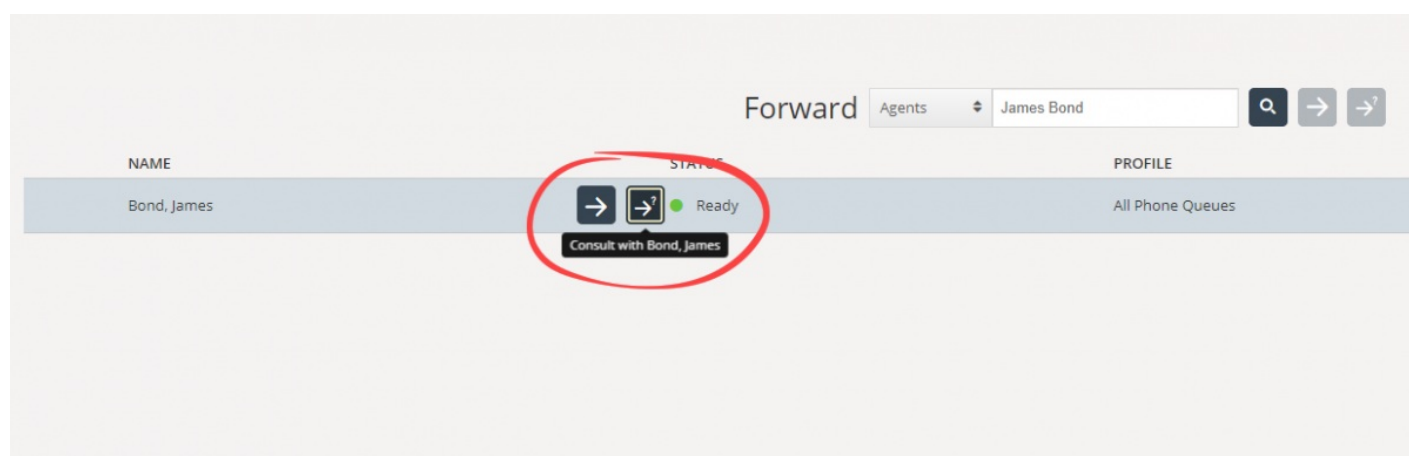
It is also possible to make consultation calls to queues. With this option, you can guide a caller from an incoming call to an agent in another queue by consulting with the agent first.

When making a consultation call you are connected to both the caller and the transferee at the same time, but the caller is automatically put on hold and cannot hear your conversation with the transferee. The callers call handling is managed in the upper half of the phone widget, and the transferees call handling is managed in the lower half.
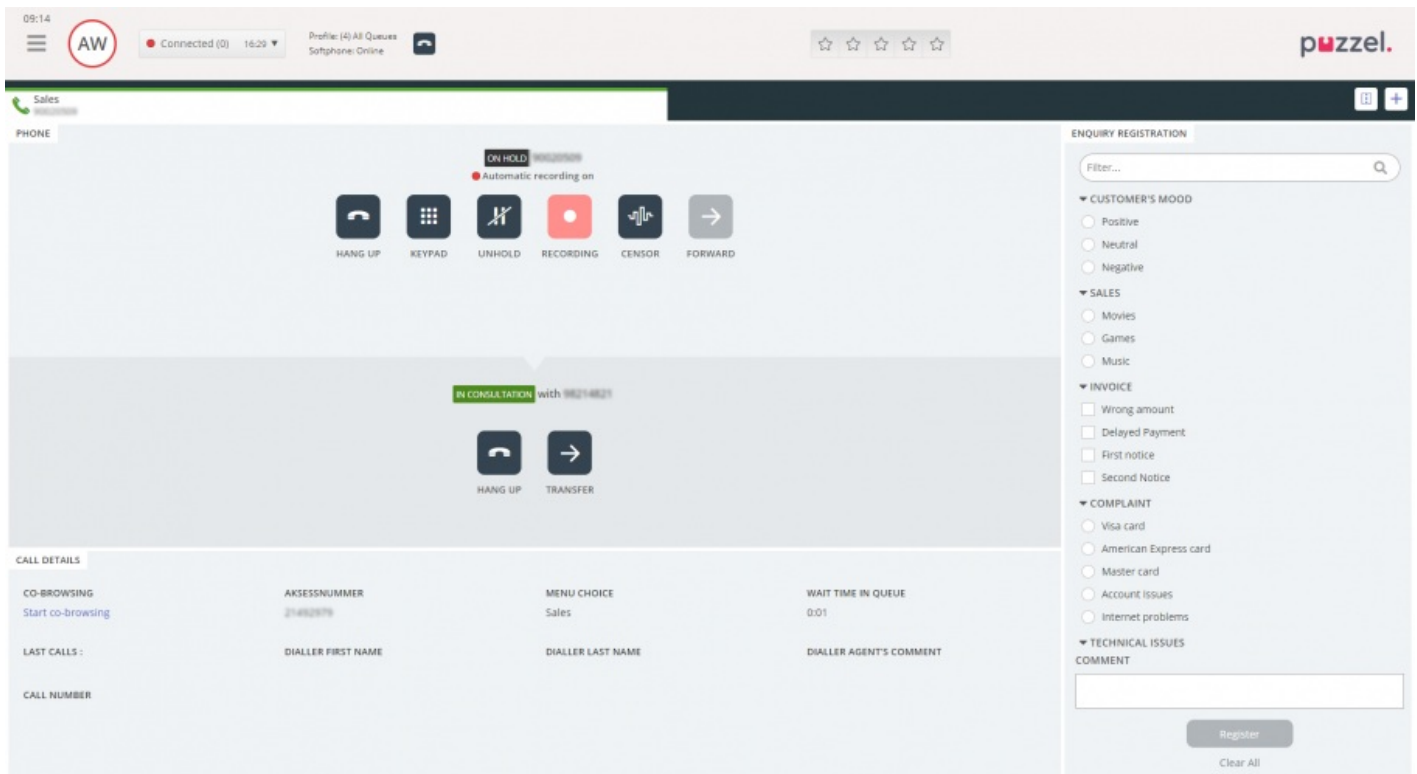
When in a consultation call, you have three options:

1. You can click on the transferee's "HANG UP" button to end the consultation call and connect to the caller again. This will automatically connect you to the caller again.

2. Click on the transferee's "TRANSFER" button to transfer the call to the transferee. You as an agent become available again.

3. Include the caller in the consultation call, making it a three-way conference call, by clicking on the caller's "UNHOLD" button (to take the caller off hold). Now all three parties in the conversation can hear each other.

Transfer calls with the use of the telephone keypad (DTMF tones)

You can also transfer calls to known numbers with or without consultation, using your telephone key pad.

- To transfer a call without consultation: Press #number# and hang up.

- To transfer a call with consultation: Press #number# and wait for an answer (the caller will be put on hold when you press the first #). When the consultation call is established, meaning that you are speaking with the transferee and the caller is put on hold, you can:

  - hang up to transfer the call. You as an agent become available again.

  - press ** (to disconnect the transferee) or have the transferee hang up. This will automatically connect you to the caller again.

If you enter the wrong number, or you want to **cancel the consultation** call because no one answered, or if the consultation call ends up in a voice mailbox, you can press ** to cancel. When pressing ** you are connected to the caller again.

The default combination to cancel a consultation call is **, but this can be configured by Puzzel. If ** does not work for you, please contact your supervisor or Puzzel to verify the setting for your solution.

Useful information about DTMF tones

- To put an ongoing call (non-consultation) on hold, press **. To retrieve the call, press ** again.

- If more than 3 seconds elapses between any pressed key, the command is aborted and you must re-start the process (3 sec. is default value but can be configured by Puzzel). This also applies to the #number# command.

- If the person you perform a consultation call with is engaged or doesnt answer within x seconds (defined in solution set-up, e.g. 25 sec.) you will be informed about this. To retrieve the call thats on hold, press **.

- Not all phone devices are set up to support DTMF tones for incoming calls. Contact your supervisor if this seems to be the case.

Making a call

In addition to receiving incoming calls, you can make outbound calls from the agent application. To initiate an outbound call, open the Contacts tab from the tab menu. From here you can either type the telephone number directly in the search field and click on the CALL button, or you can enter the name of the agent or catalog contact you want to call and click on SEARCH to get an overview over relevant hits. To call an agent or catalog contact in the list, click on the relevant Call button on the relevant row. A new Callout tab will automatically open where the outbound call is handled.
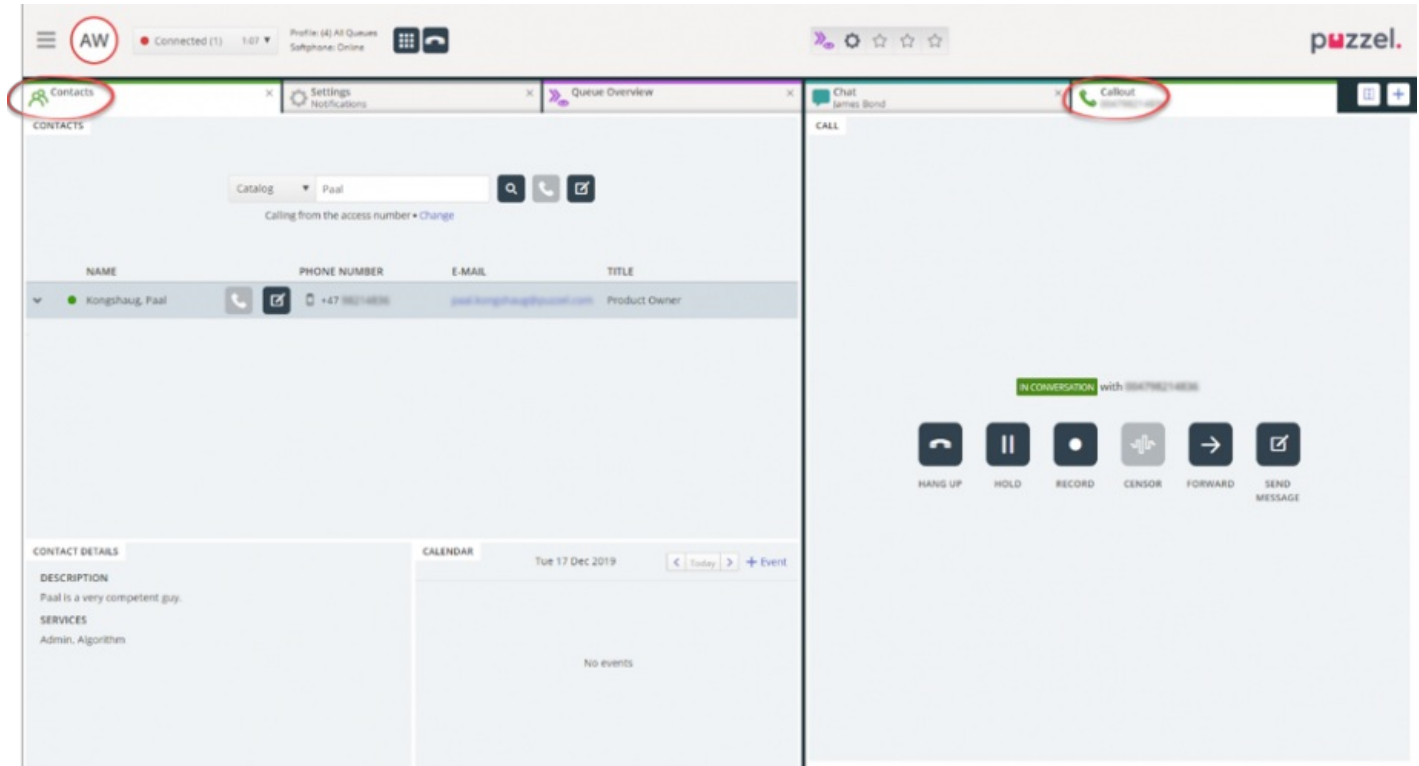
An outgoing call will first connect to the number you have logged on with. You can abort the outgoing call by clicking on the CANCEL button during the setup. When you have answered your call, the system will connect to the specified number or agent you are calling. The status of the call is shown in the display. If enquiry registration is activated, it is also displayed in the tab, as shown in the example above.

Useful information about outgoing calls

- If a request from a Puzzel queue is allocated and sent to you just before you have clicked on the Call out button (your status will be Connecting) you will receive the message Outgoing call initiated, but when your telephone rings it will be in incoming call from a customer. When this conversation is over Puzzel will resume the outgoing call.

- If you are in a pause-status when you click on the Call out button, the pause is ended, and the outgoing call will be carried out.

- If you have wrap-up time enabled, this also applies to your outgoing calls (also those that are not answered by the answering part) and your status will (at hang up) change to Wrap-up. To end wrap-up after an outgoing call you can manually change your status to Ready.

- An agent cannot transfer or start a consult call when engaged in an agent-to-agent call. The agent that initiated the agent-to-agent call can click "HOLD" and start a recording (if configured), but the agent that received the call cannot click "HOLD" or other call control buttons.

- An agent-to-agent call is not put in a queue and no request is generated, so it will not be shown all places in Puzzel.

- An agent-to-agent call is not shown on page Real-time - Ongoing calls in the Admin Portal nor in the agent application since there is no "request" involved.

Written requests

In addition to calls, you can receive written requests, given that your companys solution is set up with this, and that you are logged on with a profile giving you requests from the written requests queues. Written requests include web chat, e-mail and social media requests

Allocation limitations

In general, you can be allocated with one phone call and up to eight concurrent written requests (chat, e-mail or social) at the same time.

As a main rule, you are not offered any written requests while you are engaged in a phone call, but you can receive a phone call while engaged in written requests. Also, your supervisor/administrator can block you from receiving incoming phone requests as long as you are handling more than a certain number of concurrent written requests (defined in the admin portal). However, this setting will not prevent you from making outbound calls.

Adjust maximum number of concurrent written requests

For written requests, you can be set up to handle more than one concurrent request. If given access, you can also define how many requests you are comfortable with handling at any time. You cannot exceed the amount of maximum concurrent requests defined by your administrator, and you cannot define the amount as low as zero. This setting is made in the applications Settings tab, under Written Requests.

To see all sections under written Requests, see the list below:

- [Email/Etask Requests](#)

- [Web Chat Requests](#)

Email/Etask Requests

To receive e-mail/e-taskrequests, you must be logged on with a profile that contains the e-mail queue(s). When being offered an e-mail request, it appears in a new tab in your application, and you can choose to accept or reject it.
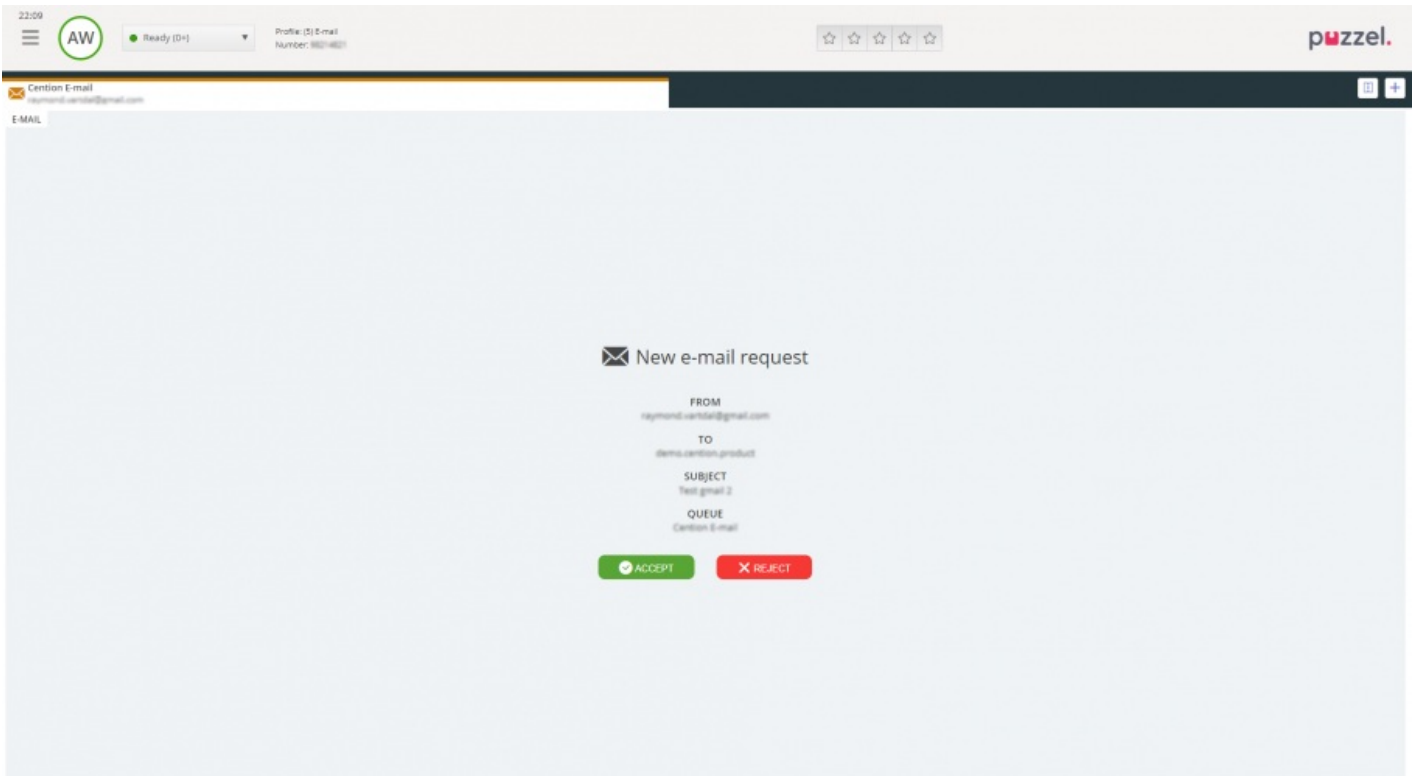
If you reject the request, it is put back in the queue and offered to another agent. If you accept it, the e-mail/e-task that the request points to is opened in a new browser tab. If you are offered another e-mail/e-task request, it will appear in a separate tab in the application.

Email/etask action buttons

The e-mail/e-task window in the application has a couple of features to help you out during the session.

Icon	Description
→	**Transfer**: You can transfer an e-mail/e-task request to another agent or another queue. When transferring, you can choose to add a comment that the receiving agent can see.
↓	**Personal Queue**: If you want to put an accepted e-mail/e-task request on hold in your personal queue while you work with other stuff, you can do so by putting it in your personal queue. You can at any time open the personal queue tab and pick up the requests that are there.

Ending an email/etask requeust

An email/etask request is ended when you as an agent close the request by clicking on the X icon in the top right corner of the Requests tab.

Web Chat Requests

To receive web chat requests, you must be logged on with a profile that contains the chat queue(s). When being offered a chat, the request appears in a new tab in your application, and you can choose to accept or reject it.
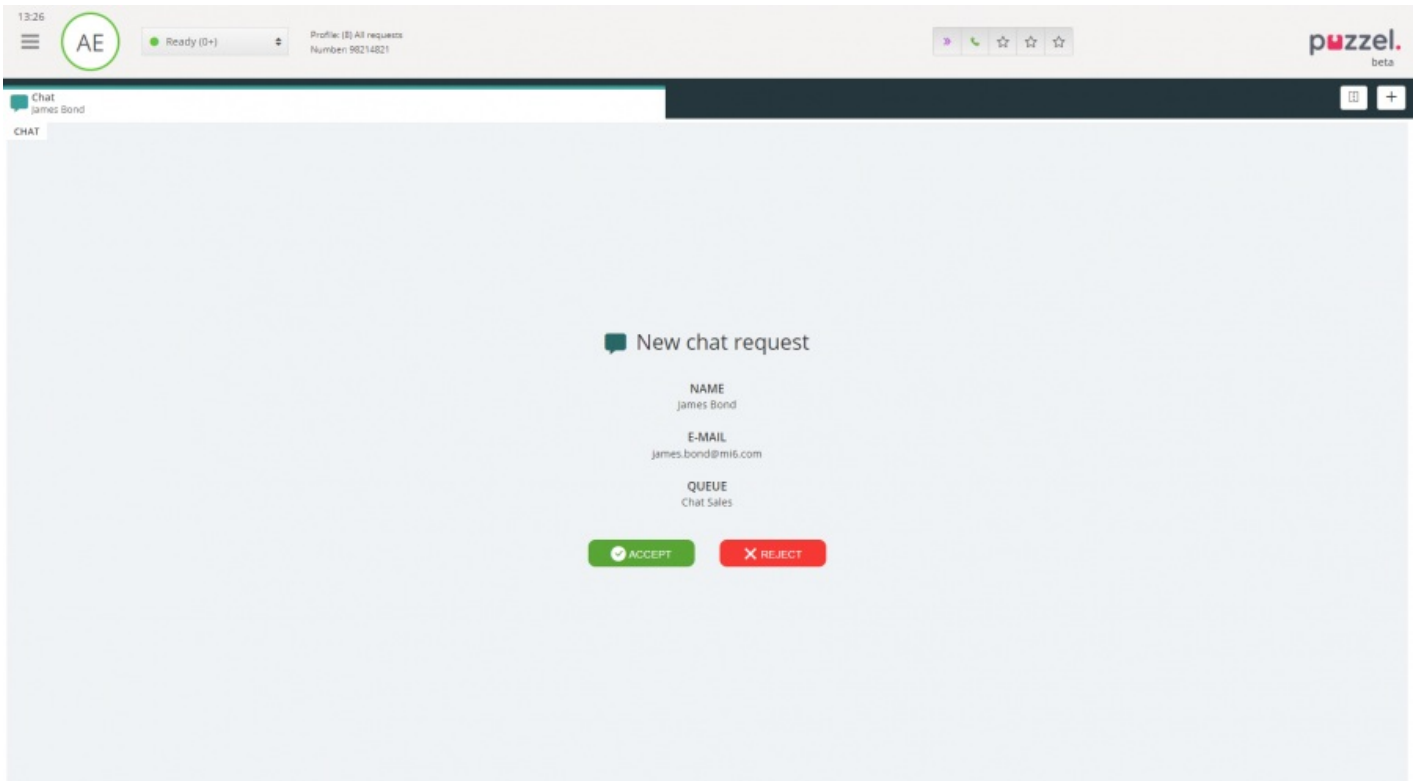
If you reject the request, it is put back in the queue and offered to another agent. If you accept it, you are immediately connected and can start the conversation. If you are offered another chat-conversation, it will appear in a separate tab in the application. Furthermore, customer details with authenticated variables (like name and e-mail addresses) are shown with a lock-icon in the chat details window, so that you know you are talking to the right person.

Warning when closing an active chat window

If you accidently close a chat tab that still has a connected chatter, a warning window will pop up asking you if you are certain that you want to close the chat. If the chatter has disconnected from the chat session the warning will not pop-up and you will be able close the chat tab without a warning.

Chat action buttons

The chat window in the application has several features to help you out during a chat conversation.

Icon	Description
≡	**Predefined**: You can have set of pre-defined messages that you can send to the chatter. Click on the icon to see the predefined messages your supervisor has configured for you. When you choose one of the titles the belonging to message will appear in your text window and if you then press Enter on your keyboard or the "Send" button, the message will be sent.

Icon	Description
	Offer: When in a chat conversation, you can offer the chatter a set of options to choose between. This is displayed in a more structured menu and gives a better option overview than mere text. This also provides the agent with a more clear decision/choice from the chatter compared to simple text replies.
	Invite: With invite, you can invite an agent into the conversation. You can either invite an agent directly, or a random agent from a specific queue. Once you have made an invitation, you can choose to stay in the chat conversation, or disconnect yourself. After having made an invitation, you can invite more agents. However, you can only invite one agent at a time.
	Private: In a chat conversation where you have invited one or more agents, you can send hidden messages to each other by clicking on the "private" icon. Private messages are visible for agents, but invisible for the chatter. Once you have sent/received a hidden message you can see that it was hidden because of the eye-icon next to the agent name in the chat dialogue, and the different colour in the chat bubble. Click on the "eye" icon again to deactivate private messages. Hidden messages will not appear in the chat logs sent to the chatter after the conversation. They will, however, appear in your organisation's chat logs; therefore, hidden messages can also be used to add internal notes to the chat. This can be useful if an administrator reviews the chat dialogues afterwards.
	Attachment: When in a chat conversation, you can add up to five file attachments of type text, pdf or an image of maximum file size, 20 MB along with the chat message and send it to the chatter.

Chat attachments

You can share files with the customers on an ongoing chat session using the file attachment option. You are allowed to attach files of type text, pdf or an image [most formats are supported] in the chat window along with the message you want to send to the customer. A maximum of five file attachments are allowed at any given point of time with file size limited to 20MB per attachment.

> Note
>
> Agents can also send attachments to other agents in private mode
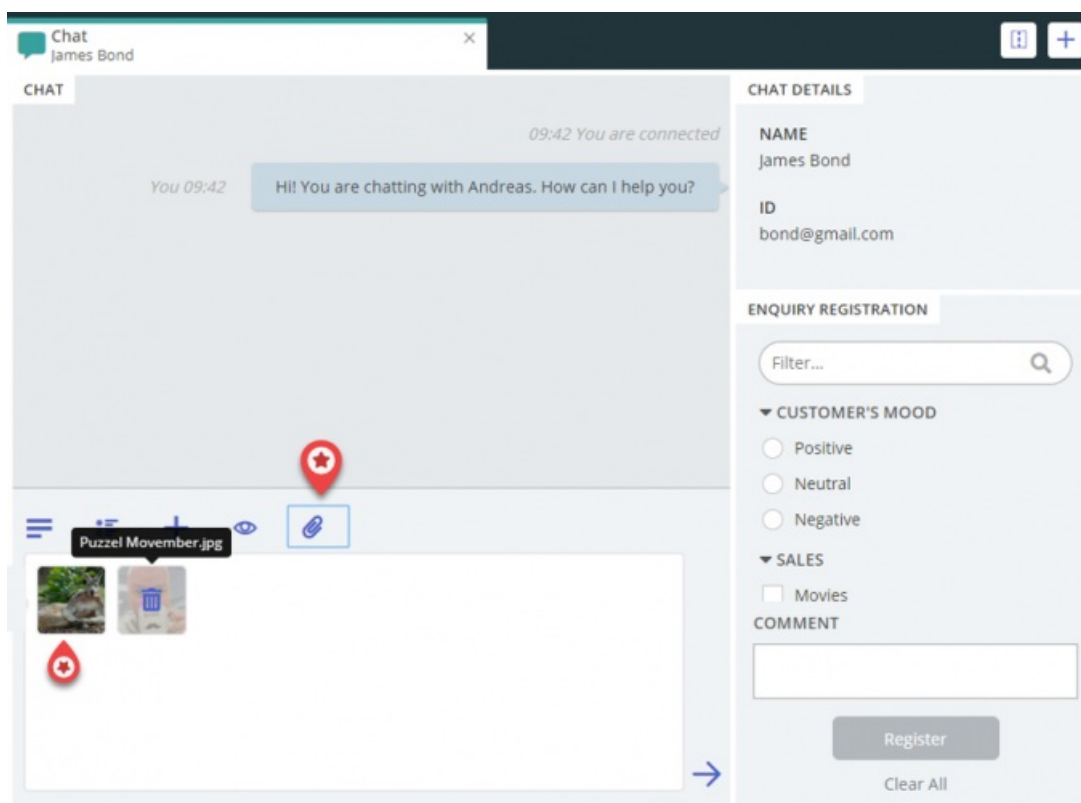
Ending a chat conversation

If the chatter ends a chat conversation by clicking on the exit- or x button in his interface, you will receive a message on your chat interface letting you know that the chat has ended.

If you want to end a conversation, you can click on the x icon in the top right corner of the chat tab.

Dialler Calls

A solution can be set up with dialler functionality. The Dialler enables your supervisor/administrator to upload a list of contacts to call. These calls are automatically allocated to agents logged on with a profile containing the relevant campaign queue's skill. The Dialler calls a contact max x times (as defined) or until the contact answers. A dialler call is set up with one call to you (the agent) and one call to the contact, before connecting the two.

There are 2 main dialler modes available. Your company might have Dialler campaign queues using different modes. The mode in use determines if you as an agent or the contact is called first.

- **Preview Mode** The agent is called first and receives information about the contact to be called. When the agent has answered the call, the contact is called. This gives you some time to prepare but note that not all called contacts will answer. If you (the agent) do not answer the offered call, it is sent to the next ready agent.
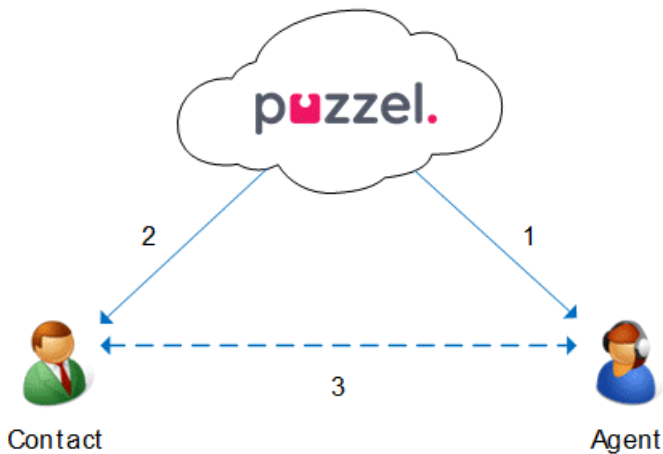
- **Predictive Mode/Power Mode** The contact is called first. When a called contact has answered, a ready agent is called and connected. You must use the Puzzel Softphone, which auto-answers the predictive/power mode calls, so that the contact that already has answered gets a live agent on the line within a few seconds.
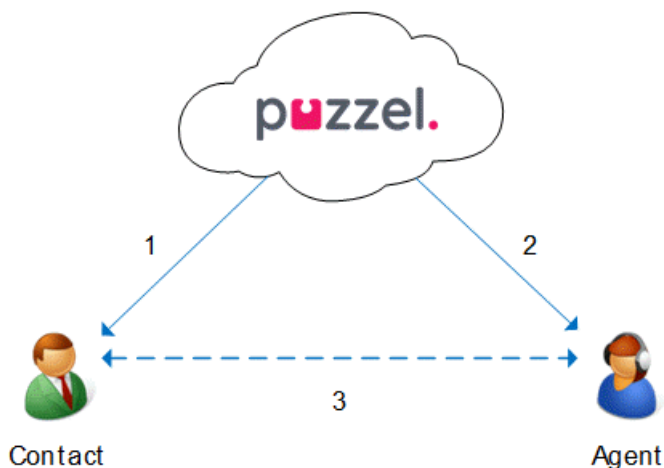
> **Note**
>
> When youre logged on to a Predictive/Power mode queue, do not click pause/log off or initiate an outbound call while in status Ready, because the Dialler has already started calling a contact. If the called contact answers and you are no longer ready, the contact will experience a silent call since no agent is ready. When you need to click pause (any yellow state like admin, break, training etc) or log off, always click pause when you are in status Wrap-up!
> Make sure you extend your (pre-defined) wrap-up if you need to, so that your status doesnt suddenly change to Ready before you are really ready. If you click pause right after becoming Ready, this results in a new contact being called, and if the contact answers there will be no agent to answer. We recommend a long pre-defined wrap-up so that you

dont need to extend wrap-up, but you only need to click Ready when you are. Time in wrap-up is reported in statistics.

For more detailed information about how the dialler is set up on your solution, we recommend that you address your supervisor.

Enquiry registration

Enquiry registration is an optional feature enabling agents to register the reasons for the requests. If enabled, you can also add a free-text comment to each request. With this information, your companys supervisor or administrator can easily fetch statistical reports showing all registrations from all agents and get an overview of the most common types of requests. This feature can be displayed as a side panel or a separate window.

The supervisor or administrator creates the categories and topics for the enquiry registration, as well as determine if a category should support more than one choice. Categories with checkbox indicate more than one choice, while radio buttons indicate only one choice. When you receive a new request, a new empty Enquiry registration widget will appear in the request-tab.

Forced registration can be enabled, denying you to close the ongoing requests tab before making a registration.

> **Note**
>
> Enquiry registration can be enabled for both incoming and outgoing calls.

Dialler Feedback Registration

If you are answering dialler calls, the agent application can be set up to include three additional elements in the enquiry registration widget.

- In the Action section, there are two optional alternatives:

  - Mark as unanswered/voicemail - Check here if the call was actually answered, but by the contacts answering machine/voicemail. The result is that the contacts status is changed to Not answered so that the Dialler calls back the contact later, if more tries are left. If the called contact does not answer (ringing timeout or you hang up while its ringing), you should not check here.

  - Reschedule - If the contact and you agree that you should call the contact later, then check Reschedule, verify that Myself is selected and enter the desired date/time and a comment. If you now know youre not available at the rescheduled time, you can reschedule to Any agent so that another agent gets the rescheduled call. Rescheduled Dialler calls to Myself are shown in your Scheduled Calls tab (requires access).

- Category and topics for campaigns: An Enquiry Registration category can be reserved for dialler calls per campaign. A category for a Dialler campaign looks like any other category, but it only appears for Dialler calls. Typical topics are Sale, Interested and Not interested. If your administrator has defined Voicemail as a topic, please note that this is for statistical purposes, and you still need to check action Mark as unanswered to tell the Dialler to call this contact again. A topic called e.g. No answer is needed for Preview mode and Forced enquiry registration.

- Comment: If you reschedule a call, it is important that you add a comment. The reason is that this comment is shown in the agent application when the rescheduled call is sent to you, or to a colleague if youre not available at the rescheduled time or if Any agent was selected.

What happens at the rescheduled time?

If you reschedule a Dialler call to happen at e.g. Wednesday at 1500, this rescheduled call is shown in your Scheduled calls list from you ordered it until Wednesday at 1500. At the rescheduled time, the contact is put into the same Dialler queue, and it is now shown in your personal queue. This contact is reserved for you in as many minutes as defined for this campaign (e.g. 20). If youre ready at the rescheduled time, the call is sent to you right away. If you are logged on to queue but not ready, the call waits for you in the reserved time, and if you dont become ready during the reserved time, the call is sent to another agent. If you are logged off at the rescheduled time, the call is sent to the first ready agent on this Dialler queue.

When a rescheduled call is sent to you, you should answer, and then the contact is called. The comment you wrote when reschedule was ordered is now shown. If the contact does not answer, you can order a new rescheduling if you like.

The Menu

The application has a menu in the top left corner of the application. The menu gives you the option to adjust the applications functionality and appearance. You can among others edit your profile, change your notification settings, and edit the number of concurrent written requests. Click on the icon to see the alternatives.
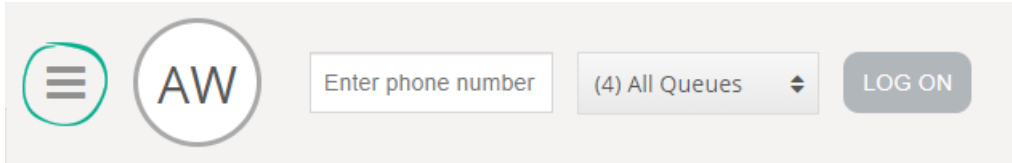
New Tab

New Tab takes you to the same view as when you click on the "+" button in the main window's upper right corner. From here you can open a new tab dependent on the functionality to which you need access.

Personal Queue

Personal Queue opens the personal Queue tab and shows its contents.

Settings

Settings open a Settings Tab where you can make different adjustments or changes in the settings menu. The settings tab has several sub-menus explained below.

Enquiry Registration

Under Enquiry Registration, you can choose if you want all the categories to be collapsed by default. This is practical if you have many categories or topics, forcing you to scroll for relevant topics for each request.

Edit User

Under Edit User, you can change the main settings for your user account, like changing your e-mail address, phone number or password. We recommend that you add your e-mail address or mobile phone number for better and more secure password retrieval if needed. It is not possible to change the username or numeric ID through the application.

Keyboard shortcuts

Using keyboard shortcuts, you can enable/disable the use of keyboard shortcuts in your application. A list of all keyboard shortcuts is provided in read-only mode for your reference.

Softphone

Under Softphone option, you can choose to log on with your phone number or Softphone. If enabled, you can make calls using the call functionality within the Puzzel application itself. Furthermore, you can define which devices to ring on [for example; headset] when receiving softphone calls and also specify an additional device [for example computer speaker] to receive calls on. In addition, you can set to automatically answer upon receiving the calls.

Written Requests

Under Written Requests, you can choose if pressing enter on your keyboard, while in a written request conversation (web chat or social media), sends the message or executes a carriage return.

Notifications

Under Notifications, you can configure your settings for sound and toaster popups for calls and webchat requests.

Sign Out

If you click on Sign Out, you will be signed out of the application and returned to the logon screen for the application.

> Note
>
> Signing out of- or closing the application does not log you off the queues and you will still receive requests to your telephone if your status was Ready when you closed the application. If you do not want to receive requests on your phone after signing out of the application or closing it, be sure to log off the queues first.

Softphone in the Puzzel Agent Application (PAA) - Basic Information

As of our January 2019 release, Softphone is embedded in the Puzzel Agent Application (https://agent.puzzel.com), enabling agents to answer calls without using an external phone, landline or mobile.

Softphone is a cost-related feature and requires activation by Puzzel. Softphone can be activated on some or all agents. Please contact your key account manager for further information regarding prices and cost.

If you have softphone enabled in your current agent application, it will also be enabled in the PAA.

> ## Note
>
> Note that this is a new softphone-solution with other technical requirements than our softphone-solution in the current agent application. Please read our basic requirements document(requires sign-in) for details regarding firewall settings and relevant ports/ip-addresses. It is recommended to start testing softphone with one or two agents to begin with and eventually extend the number of users.

Facts and Features

- Softphone utilizes WebRTC technology to carry the conversation's audio through the agents internet browser and internet connection.

- Softphone requires that agents have stable and sufficient internet access, and it is recommended to estimate 100kbps per softphone call on a wired internet connection.

- Softphone is only supported on newer versions of the Chrome internet browser on desktop devices.

- The audio in conversations through softphone is handled through a headset and microphone connected to the agents computer, typically via USB.

- In the "Settings" tab, agents can toggle between logging on with Softphone or an external phone (landline or mobile).

How to get started

When the softphone-feature is activated in the administration portal, agents will see a new menu-option in the "Settings" tab. Here, agents can first of all choose if they 1) want to use Softphone or not, but also set the ringer-options, meaning where the Softphone should play the ringing tone. If you want Softphone to ring on your PC, in addition to your headset, you can define this here.
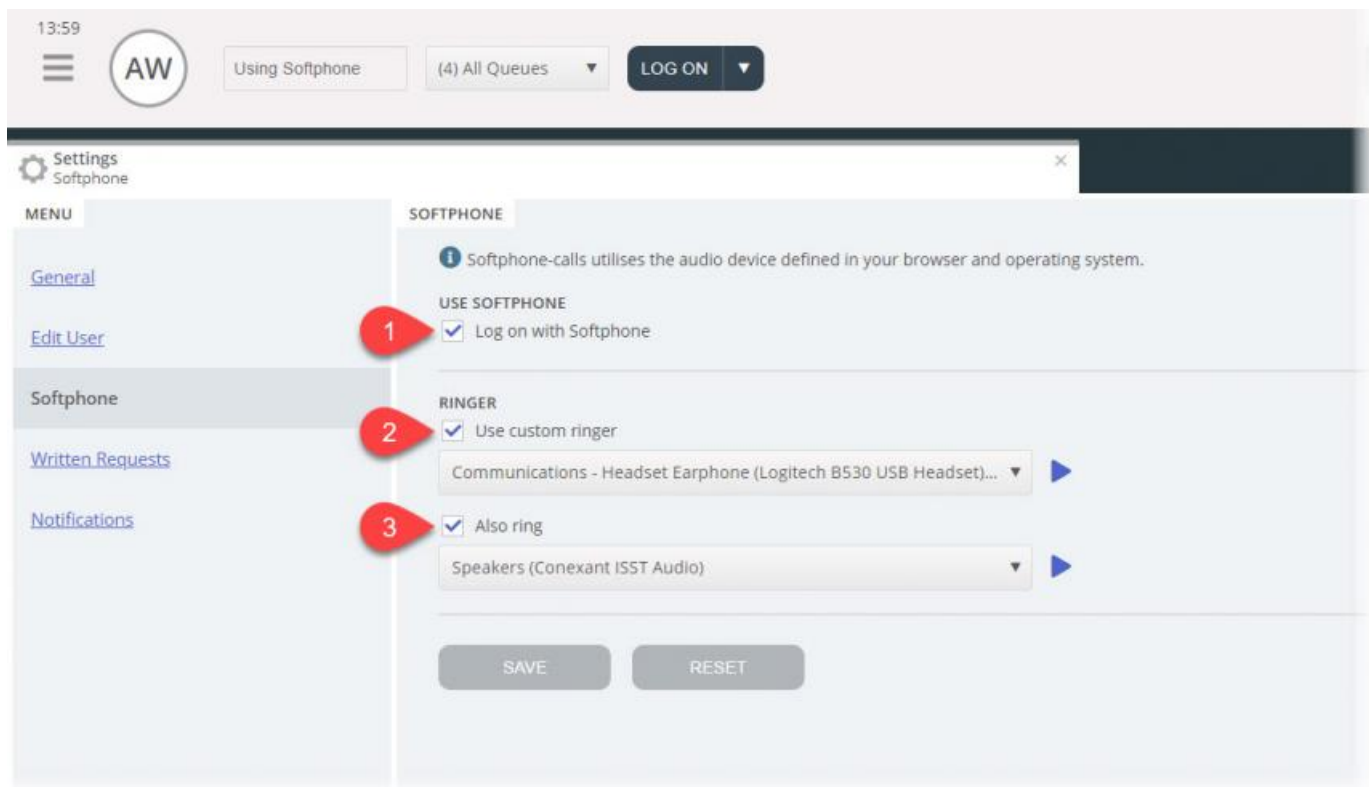
Audio setup

For handling softphone calls, the agent application uses the audio device defined in your browser and operating system.Before logging on to the queues with softphone, be assured that a headphone device, suitable for communication is plugged into the desktop device.

Your Operating System (Windows 10 used as example below)

Your headphone device should appear in your audio settings on your PCs system tray, where you can test the device and set relevant definitions. It is recommended to set your headphone device as the "Default Communications Device", and your PC speakers as "Default Device", if this is not already set. This applies for both the Playback- and Recording settings.

The PC's "Default Device" and "Default Communications Device" are related to the settings you soon will be making in the Puzzel client.
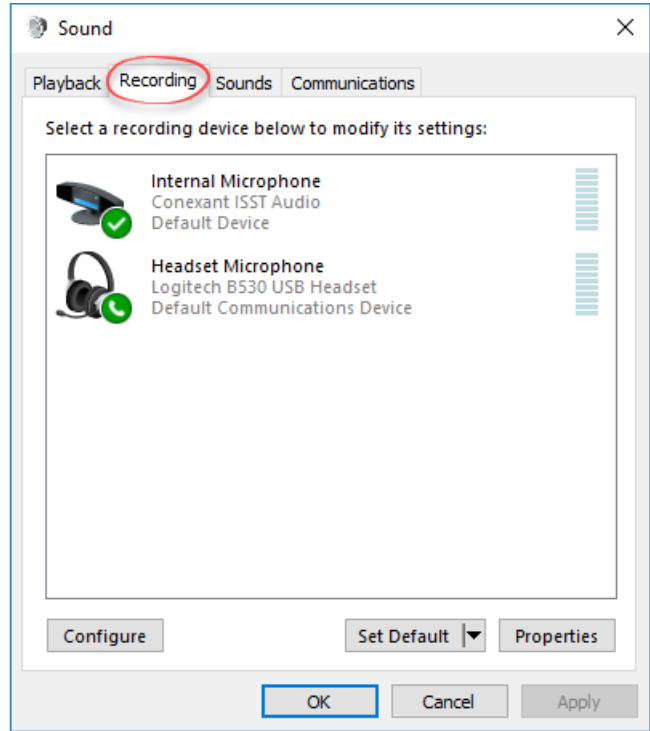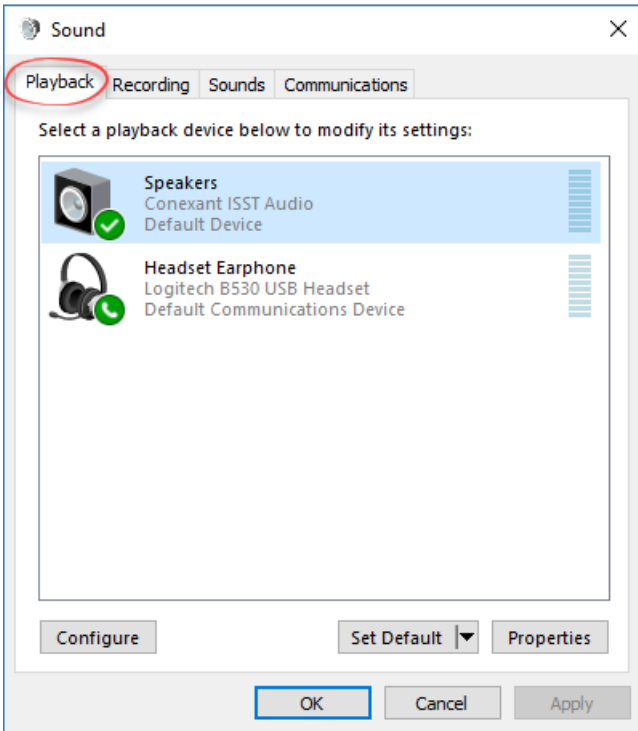
Chrome Browser

When receiving the first call on softphone, you are prompted to give the agent application access to your microphone in Chrome. You must allow this in able for softphone to work properly.
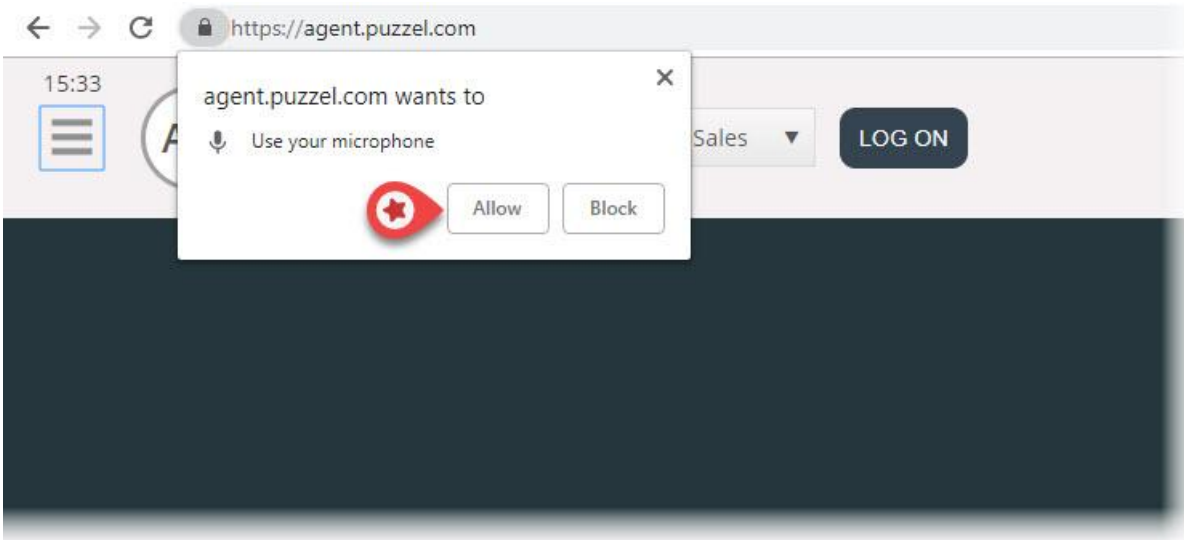
Your microphone settings in Chrome can be changed by clicking on the top right camera icon in the browser:
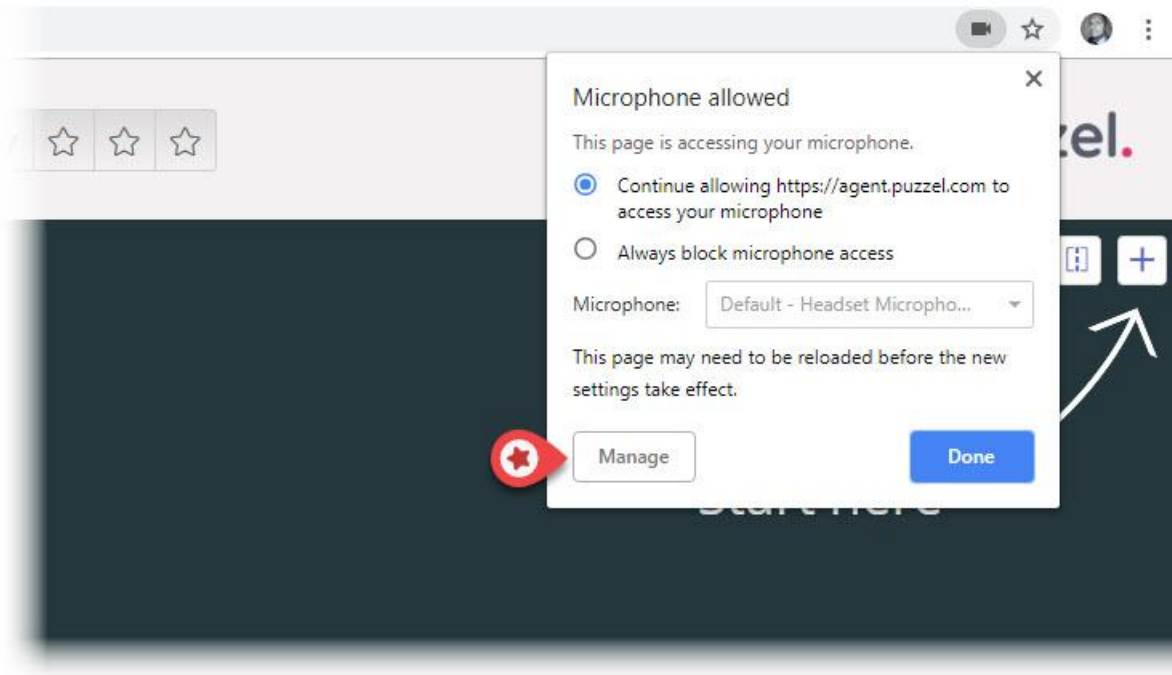
If you accidentally clicked on "Block" and need to gain access, you can do this by clicking on the Secure setting in the top left corner and then click on the Block setting and change it from Always block on this site to one of the above settings as shown in the next picture.
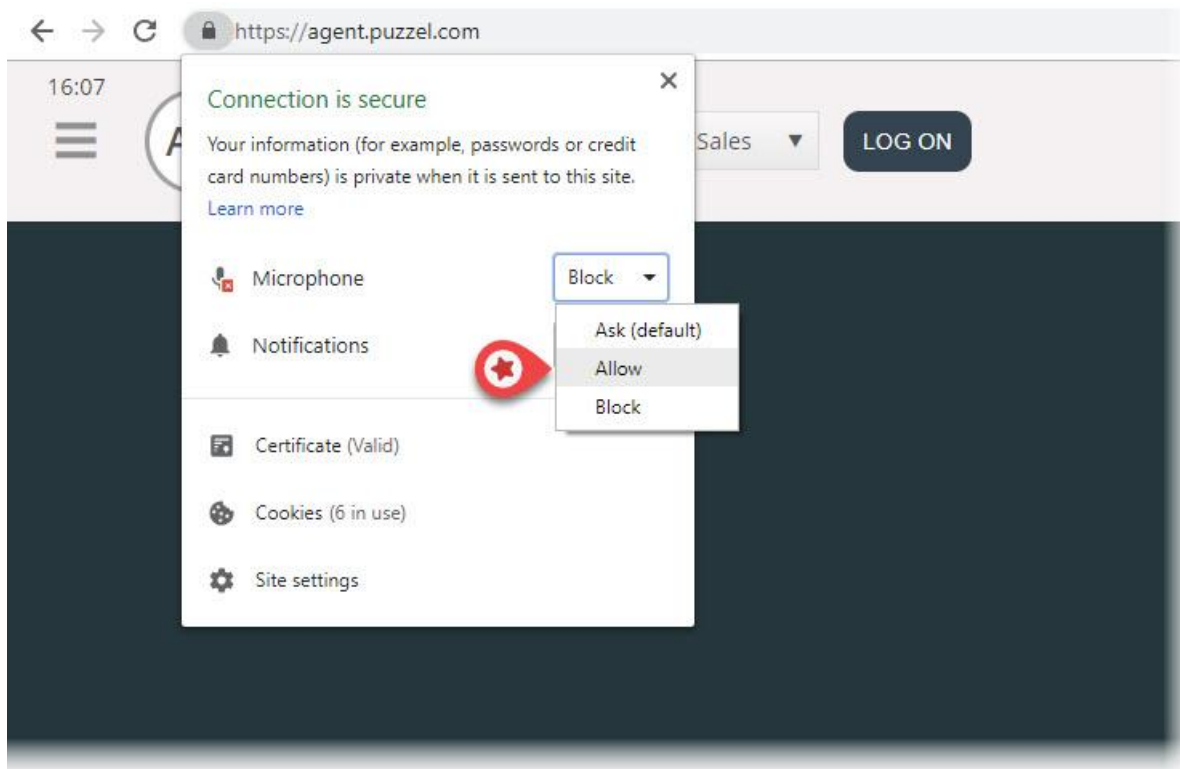
Recommended devices

Puzzel Softphone is hardware agnostic, in the sense that no specific audio hardware is known to 'work better' with our software than any other. However, we still get many questions from our customers about what headsets we recommend agents use. We can't offer any such recommendation beyond simple guidelines, but we can tell you what headsets *our own* agents use:

- Plantronics Voyager Focus UC B825-M (wireless)

- Jabra EVOLVE 40 MS Stereo (wired)

- Jabra EVOLVE 65 MS Stereo (wireless)

As for simple guidelines, a good option may be to simply look for well-reviewed gaming headsets. These are designed to be worn comfortably for many hours, and audio quality from both the microphone and speakers is key. Those are the key things to look for: comfort and audio quality. The headsets we have mentioned specifically above are *not* gaming headsets, but they are the ones we use and are happy with.

Known issues

- There is a known bug that disconnects ongoing softphone calls if the application is refreshed. This is being looked into.

- Agents who are logged on with the web client cannot be logged on with the desktop client at the same time. This is not something we will look into, but users must be aware about this.

- Softphone features not yet supported are:

  - support headset gestures and button-support (planned for future releases - is developed per producer e.g. Jabra and Plantronics/Logitech)

Support and Troubleshooting

If you are having problems using softphone, double check your audio settings on both your PC and in the Agent Application first. You can also contact your supervisor who again will consider further actions and perhaps contact Puzzel Support if necessary. We have some known issues below that might be similar to your problem:

- Issues with softphone could occur on Puzzels side and we will immediately notify subscribing administrators about it. This is rare and if you experience issues without us notifying you please check your local settings. Please ask your local IT team to check relevant settings in our Basic Requirements

- Please also verify that there are no local Internet connectivity issues and that no local IT changes have been applied, which could impact connectivity to the Puzzel Softphone service. If you require any further assistance from Puzzel, please contact Puzzel Support.

- Workaround - Take a note of the callers phone number and tell him or her that youll call them back (remember that the caller can possibly hear you).

- It is likely that you cant answer and hang up softphone calls or adjust the volume through the controls/button on the headphones USB cable. This is because so called HID events (actions triggered by a USB device) apparently aren't supported yet in Chrome or other browsers. We are following Chrome for the support for this feature, since i is relevant for most softphone users.

For more technical details and requirements regarding Puzzel Softphone, please read our basic requirements document found [here.](#)

Sending log files to Puzzel

If you are experiencing problems that arent easily solved, you may be asked to send log files to our support. You can access these as follows:
Step 1 – Go to https://agent.puzzel.com and log in
Step 2 – Go to 'Main Menu' in the top left corner of Agent Application' (three horizontal lines)
Step 3 – Select 'Settings'
Step 4 – Under the 'General' section, click 'Download' and then 'Confirm'.
Note: Once the browser tab is closed the logs will be deleted. Therefore, kindly ensure the logs are saved before the tab is closed. Add this file as an attachment in your support issue so that we can analyze it.

puzzel. Solving Customer Interactions

☰ **MB** ● Admin (0) ⌄ Profile: (5) System Engineer
Number: ▭▭▭▭

☆ ☆ ☆

👥 **Contacts** ✕ | ≫👁 **Queue Overview** ✕ | ⚙ **Settings** General ✕

MENU | **GENERAL**

General

Edit User

Keyboard Shortcuts

Softphone

Written Requests

Notifications

SEARCH
✔ Show first name first

ENQUIRY REGISTRATION
☐ Collapse categories by default

LOG DATA
You can download the agent application's console log data for troubleshooting purposes. If you are experiencing erroneous behavior, log data can be useful when in dialog with our Support.

DOWNLOAD

SAVE | RESET

Jabra integration and support for headset gestures

The softphone embedded in Puzzel's agent application supports Jabra headset gestures in both Google Chrome and Microsoft Edge, with the following features:

- Answering calls

- Hanging up calls

- Adjusting volume

> **Note**
>
> The mute-button on devices do not trigger a Puzzel action, like putting the caller on hold.

By recommendation from Jabra, Puzzel have developed and tested the integration with the following devices:

- Jabra Engage 75 (dect)

- Jabra Engage 50 (Cord)

- Jabra Evolve 75 (bluetooth)

- Jabra Evolve 40 (cord)

... but is likely to work on other devices as well.

In order for the integration to work, two software must be installed on the agent's PC:

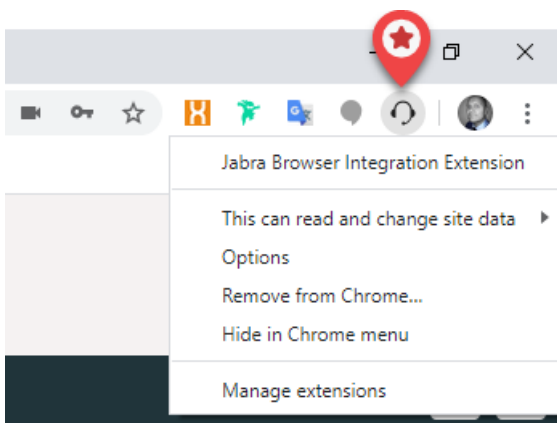1. Jabra Chrome Extension

2. Jabra Chrome Host

Note that the user needs access to download and install software on the PC.

Installing Jabra Chrome Extension

The **Jabra Chrome Extension** is downloaded directly from the Chrome browser. You can search for "Jabra Browser Integration Extension" in the Chrome Web Store, or follow this link:

https://chrome.google.com/webstore/detail/jabra-browser-integration/okpeabepajdgiepelmhkfhkjlhhmofma

When added/installed you should see a headset icon in the browsers upper right area.

If you are using the Microsoft Edge browser, you can install the same extension from Chrome Web Store, but need to allow extensions from other stores, in Edge. When in Edge, go to this address "edge://extensions/", and click on the following two

elements:
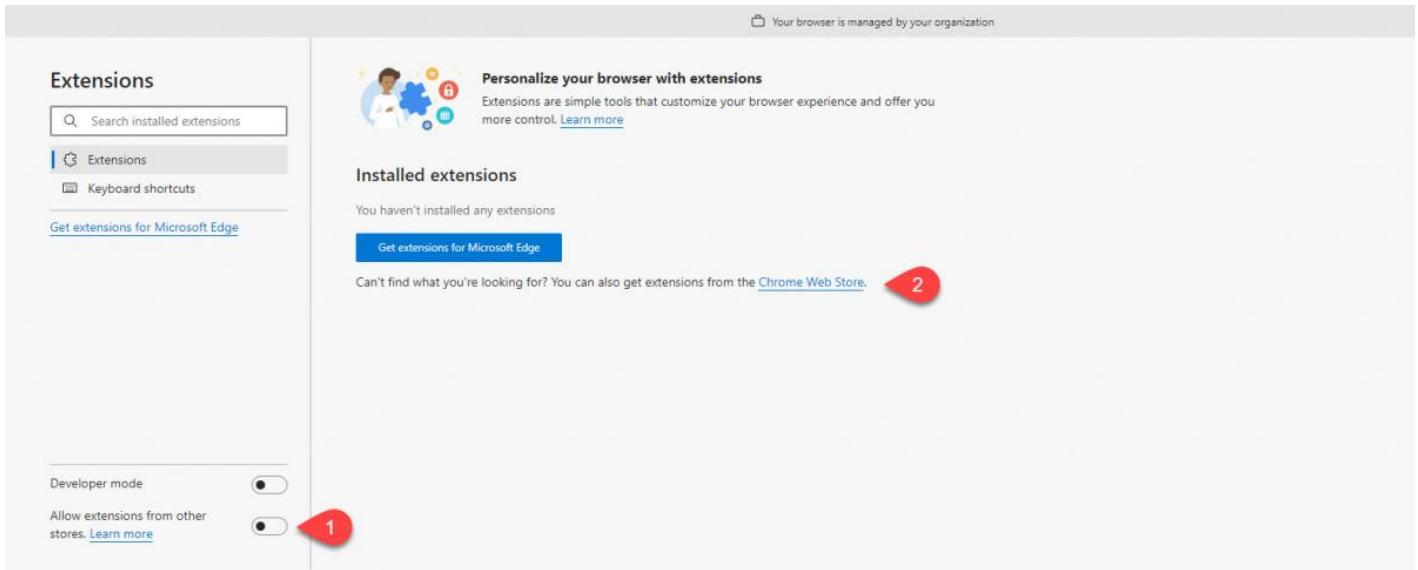
Then search for "Jabra Browser Integration Extension" choose "Add to Chrome" and confirm when you are asked to add "Jabra Browser Integration Extension" to Microsoft Edge.

Installing Jabra Chrome Host

The **Jabra Chrome Host** is used for device management and handles the communication between the agents headset and the Chrome browser. It is downloaded from Jabra's developer site:

https://developer.jabra.com/site/global/software/integration-components/browser/index.gsp

Choose and install the correct version of the chrome host, based on if you are using a Windows or Mac PC:

Resources

	Title	Version	Last Updated	Link
▼	Jabra ChromeHost for Windows	2.1.0	Feb 2021	Download
▼	Jabra ChromeHost for Mac	2.1.1	Mar 2021	Download
▼	Javascript API Client File	3.0	Feb 2021	Download
▼	Typescript Definition File	3.0	Feb 2021	Download
▼	Chrome Extension	2.1.0	Feb 2021	Google Web Store

Information from Jabra

Data transferred depends on the functions called in the Jabra library, but in general the only data being transferred are events signalling state changes, and possibly values of the settings in the headset. Jabra state that they do not use information like device serial numbers in the current components.

Also, when initializing the Chrome Host, it will make an Internet connection to the Jabra backend to check for updates to their communication protocols etc. This means that the Chrome Host may download some files (stored in the user's local profile directory of the operating system.) But these will not identify the user or the headset in any way.

> **Note**
>
> Puzzel is supporting the integration, but is not responsible for software developed and provided by a third party.

Live Share and Screen share

Using Live/Screen sharing capabilities, agents can view customer's screen and follow their navigation and scroll movements during an active phone call or chat [web chat or social channels] to efficiently assist them through their journey. This will enable agents to assist end users in handling complex enquiries in a live setting with more personalised help.

Screen share is limited to sharing the browser session only, whereas Live share allows the agent to initiate a video feed and have a humanised conversation with the customer, in addition to sharing the screen.

> Note
>
> There is no need to download any software to use this feature.

Initiating a Live Share session

During an active call or a chat session, the Live share tab will be visible to the agent. When the situation calls for help, you can click on the Live Share tab to launch the co-browsing session. You will then be prompted to create a unique code for the co-browsing session in the **Generate start code** dialogue box. Click on **Get new code** button.
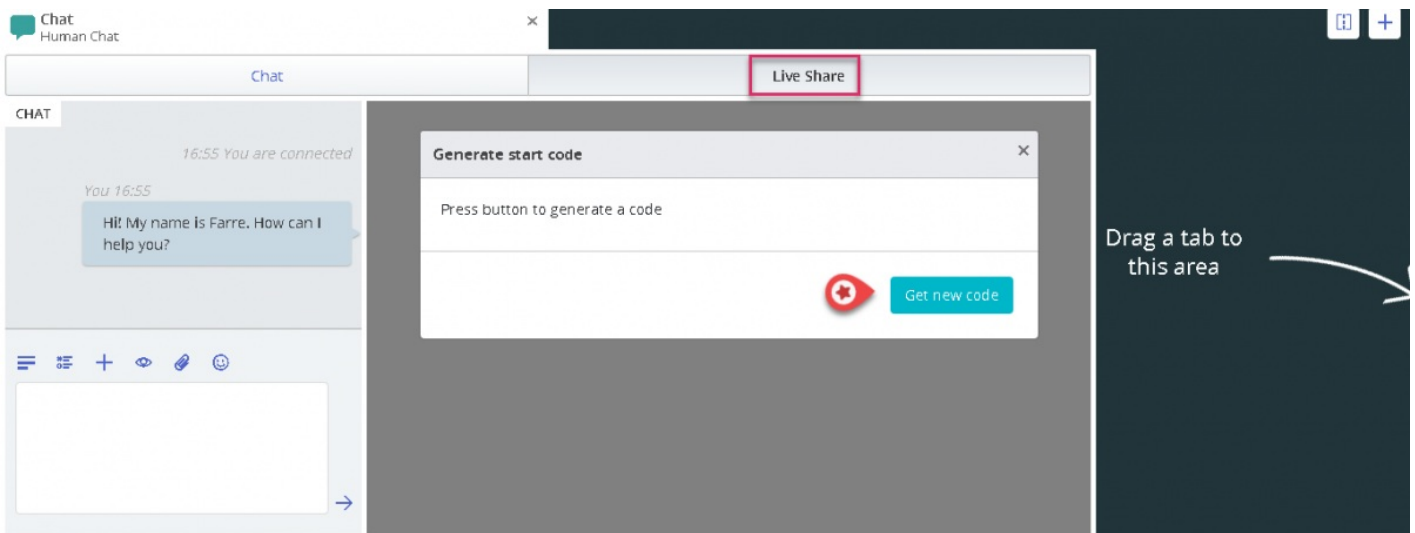

A code and a URL will be generated either of which can be shared with the customer via chat or SMS.
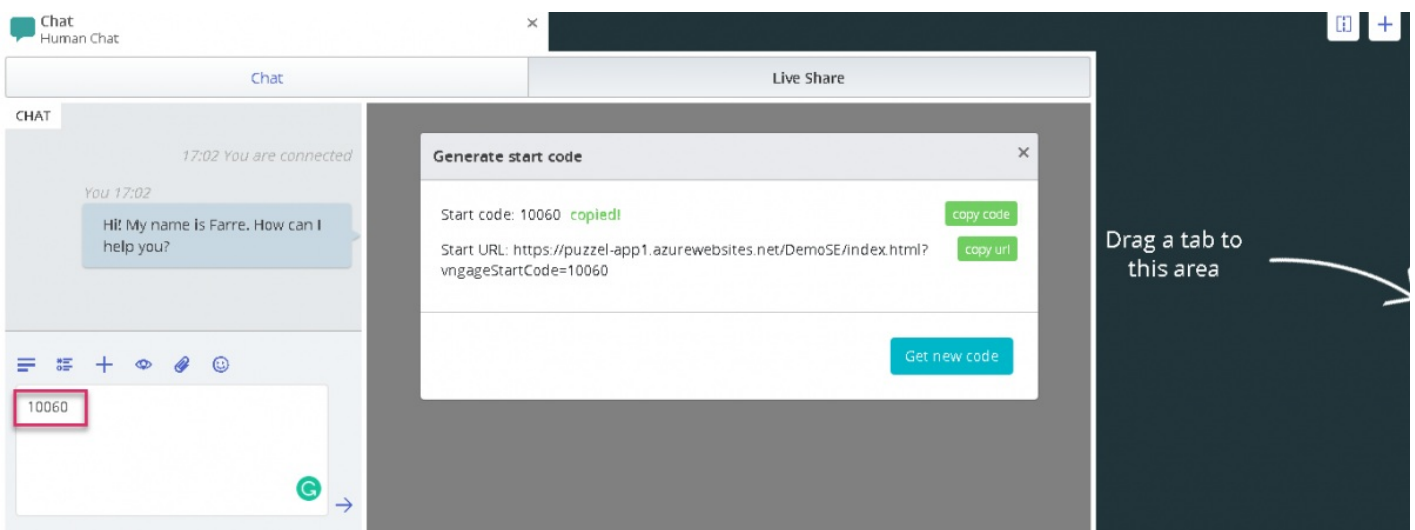
When the customer enters the received code at his end, the co-browsing session will be initiated and a reflection of the

customer's screen appears on the your screen. You will then be able to walk the customer through filling out a form or selecting a product etc with ease.

Menu Options
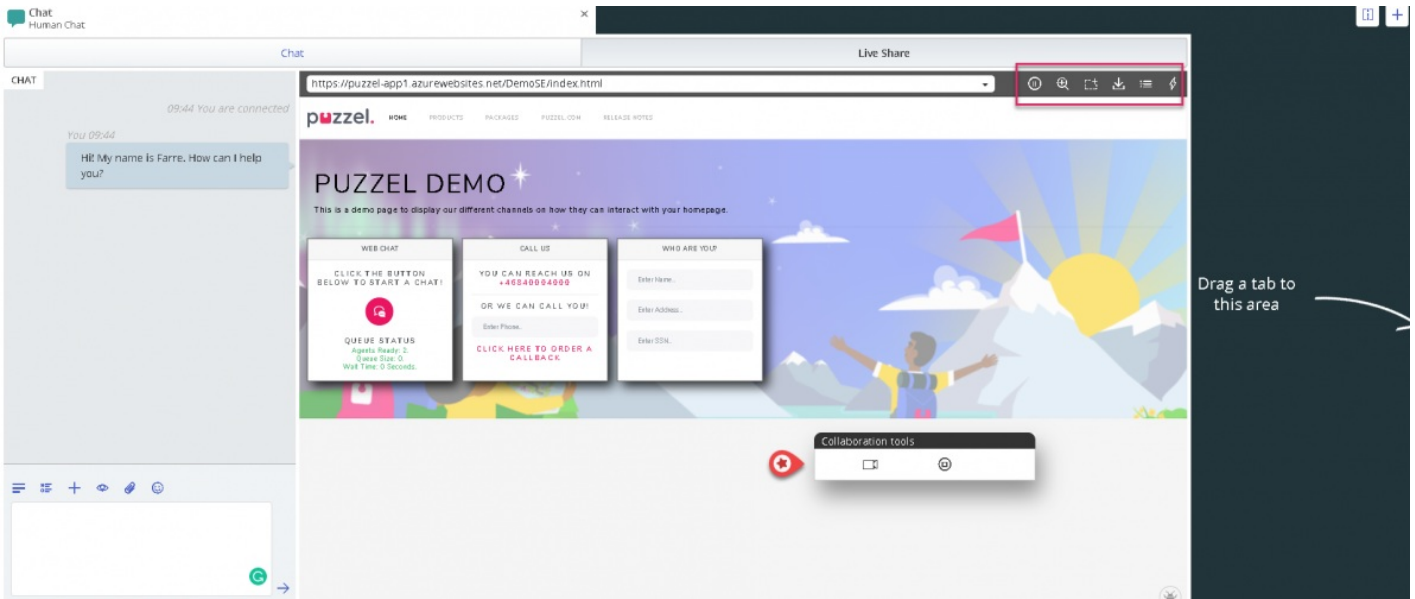
There are five menu options seen at the top right corner of the Live Share screen as shown in the picture above.

| Icon	Option	Description
	Pause	This pauses the co-browsing session until it is pressed again to resume
	Scaling	This helps you to zoom into sections of the page for a closer view
	Highlight	This can be used to highlight sections or fields on a webpage to draw customer focus
	Get page	This is used to refresh your screen when the customer makes changes on his end
	Action	This gives a list pre-defined set of links similar to bookmarks, to which you can direct the customer to

Pause Co-browsing

If you want to look for some information on the website before sending the customer to that page, you may want to pause the co-browsing session so that you don't navigate the customer along with you. Once you've located the necessary information, you can resume co-browsing with the customer and direct them to it.

You can also suspend co-browsing, if the consumer is looking for something on the webpage and you don't want follow him along the way.

Highlighting the area of focus

You can use the highlighting tool to draw the customer's attention to a specific portion of his screen. For example: if you want the customer to fill up a field in a form or to highlight a product of interest. The highlighted section remains visible to both parties.
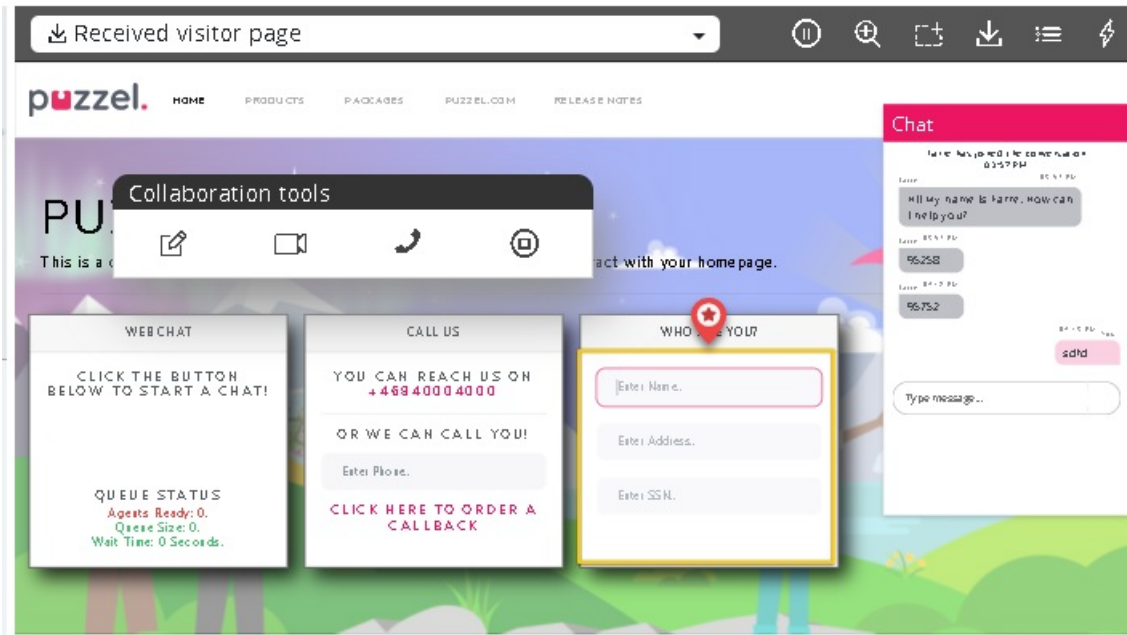
The customer can fill in the requested information, and the agent can then reload the page[Use the **Get page** option on the top menu] to see the information. All sensitive data, will be masked from the agent in order to maintain confidentiality.
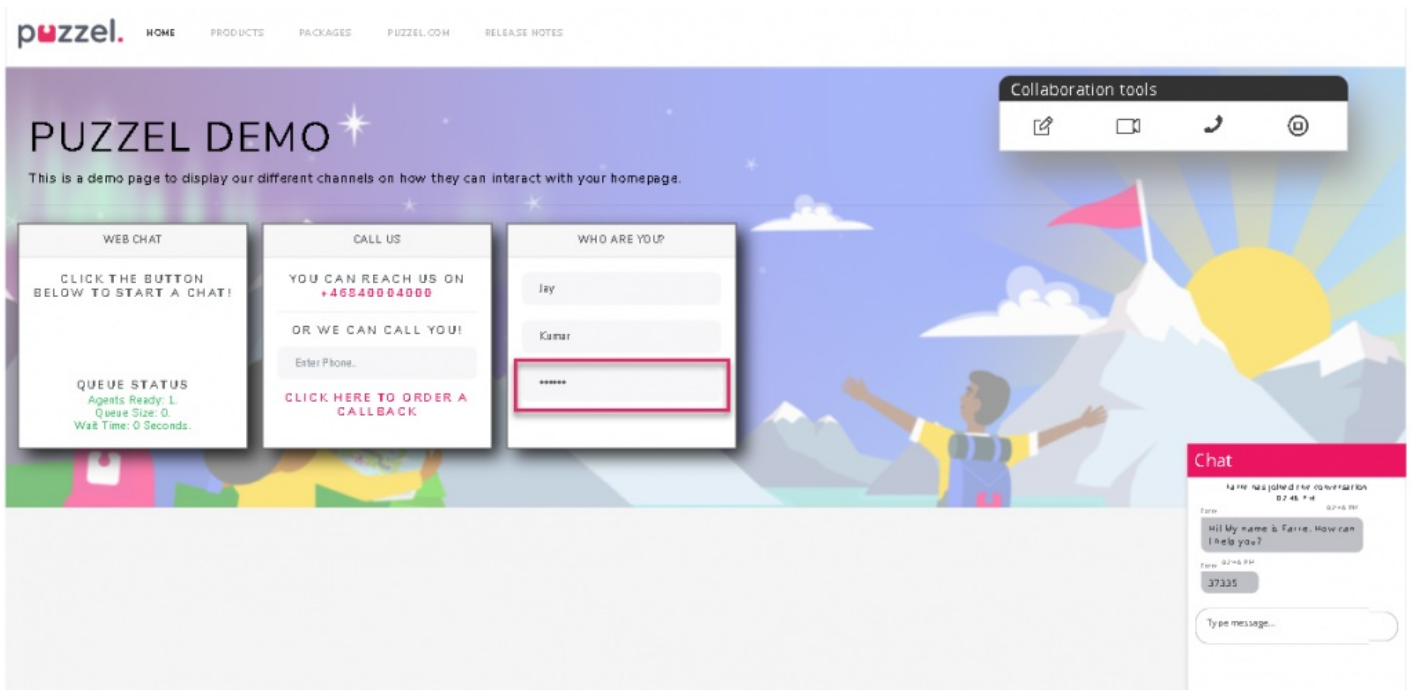
Get page

This option is used to refresh the page at the agent side when the customer has made some changes at his end. For example : Selected a product or entered the details for the requested fields in the form. To refresh the customer's page on the agent side and reconnect to the same session so that the connection is maintained, click the **Get page** icon in the toolbar as shown in the image below.
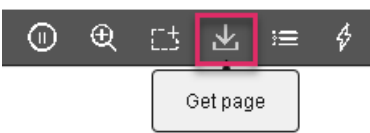
Action

The admins can create a list of all useful webpage links that are frequently used by the agents when they are answering customer queries. This list is made available under the **Action** Menu option and can be used by the agents to direct the customers to the appropriate page immediately, saving time for both parties.

Live Share session

Agents can also initiate a video feed with the customer if you are subscribed to the Live Share feature. In addition to the screen share described above, agents can start a video feed with the customer to provide a more humanised service. This gives the customer a in-store experience and are able to communicate in an effective manner.

To begin the video, click on the [icon] icon on the **Collaboration tools** toolbar. The video will be stopped if you click the same icon again, but the screen share will continue.
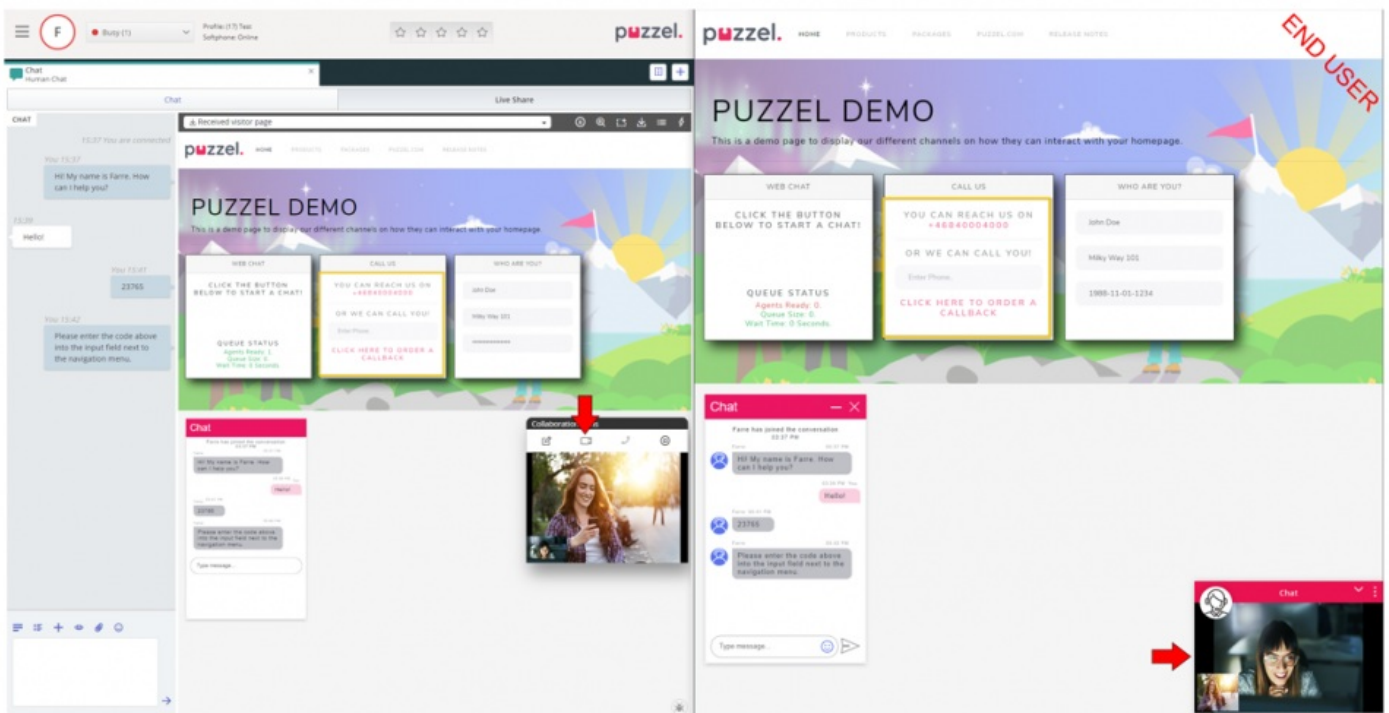
Terminating the co-browsing session

Once the purpose of collaboration has been achieved, the agent can choose to terminate the Live share session by clicking

on the [icon] icon in the **Collaboration tools** toolbar. This will end the co-browsing session alone, but the call or chat with the customer can still continue. If the session was accidentally terminated, it cannot be reactivated. A new session has to be initiated to continue Live/Screen share.