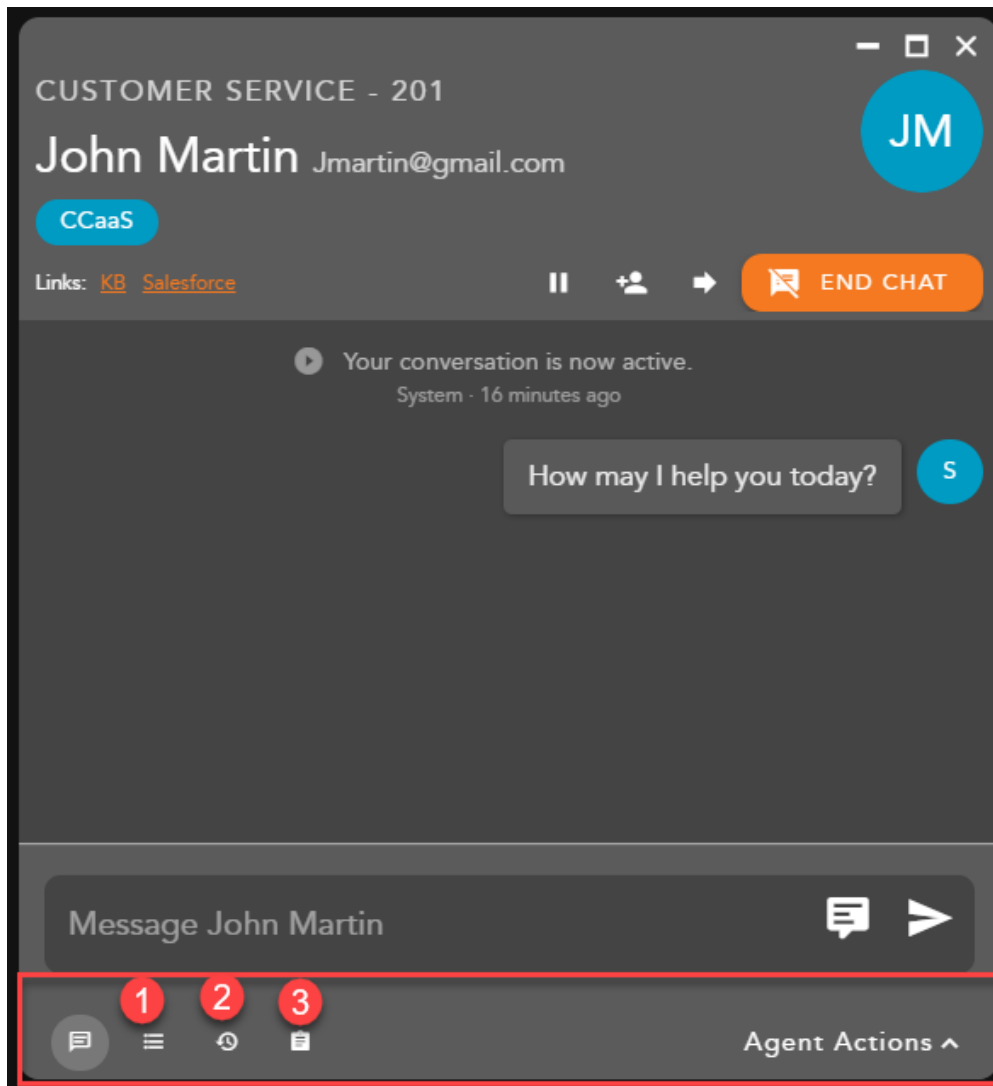


# CRM Panel

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## Overview

The CRM panel is available on active or historical interactions and provides agents access to the contacts information, historical interactions and notes and remarks from past interactions. The CRM panel is only available to agents when enabled on the agents profile found in the Setup Client.



CRM options are available in the Interactions Footer

1. **Contacts** - displays the saved contact information. The available fields are pre-configured through a CRM template in the Setup Client.
2. **History** - displays the contacts historical interactions
3. **Notes and Remarks** - notes and remarks made by agents or through the Interaction Handling Flow about the contact

## Contacts

CUSTOMER SERVICE - 201

John Martin

Jmartin@gmail.com

CCaaS

Links: [KB](#) [Salesforce](#)

||

+

→

END CHAT

Phone 1

2153451356

10 / 18

Phone 2

0 / 18

First Name

John

4 / 50

Last Name

0 / 50

Email

Jmartin@gmail.com

17 / 256

Street

0 / 100

≡

Agent Actions ^

Contacts will display all available contact information. The fields that are viewable and editable to an agent are determined by an Administrator in the Setup Client. Each field has validation on the limit and type of characters allowed. A validation error will be shown if the character limit is reached

Phone 1

215345135638135454

Value cannot exceed 18. 18 / 18

or an invalid character is entered

Phone 1

2153451356dffd

Invalid format 14 / 18

The input must be

## History

CUSTOMER SERVICE - 201

John Martin

Jmartin@gmail.com

CCaaS

Links: KB Salesforce

Search

Start Time	Last Agent	Interaction Type	Status	Last Business Process
06/29/20 09:26 PM	Liz	Incoming Chat	Handled by Agent	Customer Service
06/29/20 09:20 PM	Liz	Incoming Chat	Handled by Agent	Customer Service

Rows per page: 5

1-2 of 2

Agent Actions ^

History displays the contacts historical interactions. The default view displays the five most recent historical interactions. To display more interactions, select the desired value (5,10, 15 or All Interactions) from the Rows per page drop down. The minimized historical interaction view shows the following information:

- **Start Time:** Start time of the interaction
- **Last Agent:** Last agent that handled the interaction
- **Interaction Type:** Interaction Type of the historical interaction (chat, telephony, or email)
- **Status:** Interaction Status
- **Last Business Process:** Business Process the interaction was handled



To expand the historical view and see more details about the interactions select the pop out window icon,

Interaction History

Search

Start Time	End Time	Last Agent	Interaction Type	Status	Last Business Process	Origin	Destination	Agent Talk Time	Disposition
06/29/20 09:26 PM	06/29/20 10:42 PM	Liz	Incoming Chat	Handled by Agent	Customer Service	John Martin (Jmartin@gmail.com)	Customer Service	01:15:57	Payment
06/29/20 09:20 PM	06/29/20 09:25 PM	Liz	Incoming Chat	Handled by Agent	Customer Service	John Martin (Jmartin@gmail.com)	Customer Service	00:05:02	Payment

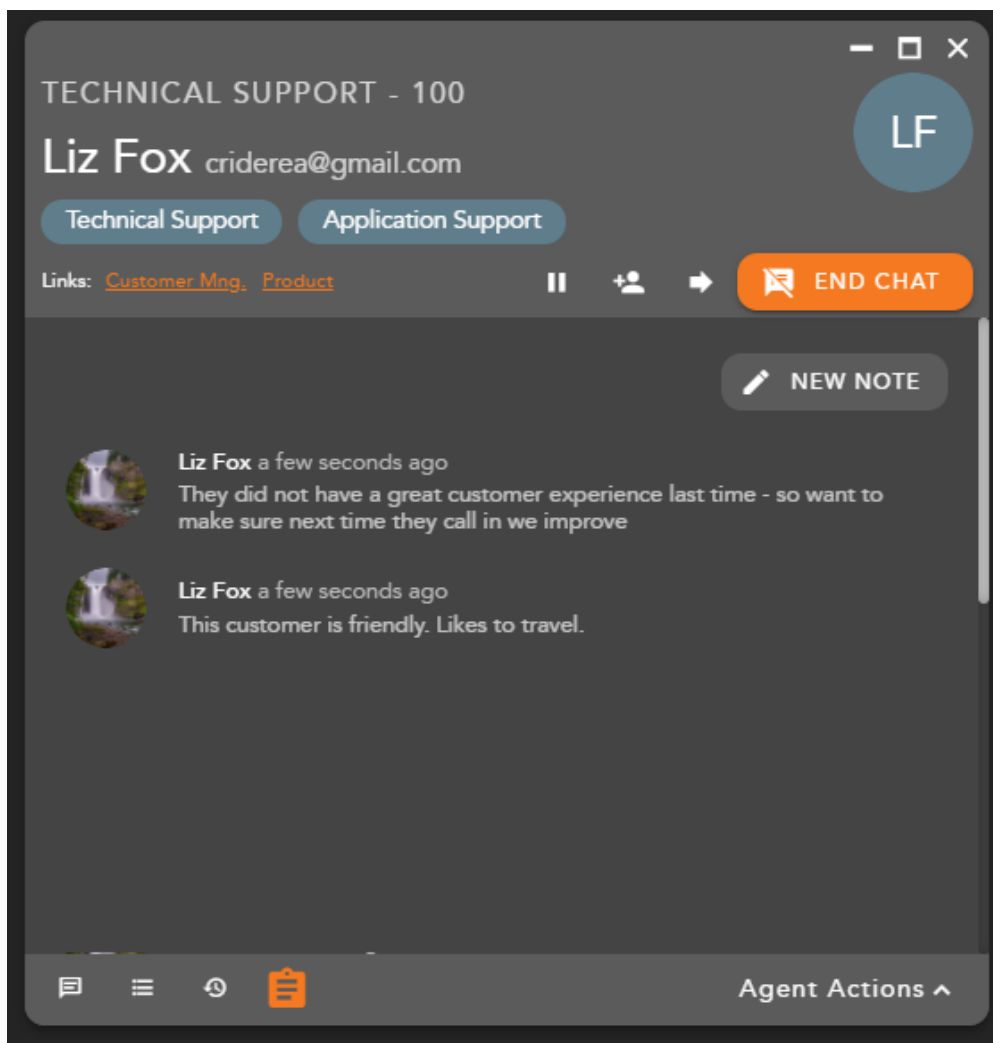
Rows per page: 5

1-2 of 2

The expanded historical interaction view shows the following information:

- **Start Time:** Start time of the interaction
- **End Time:** End time of the interaction
- **Last Agent:** Last agent that handled the interaction
- **Interaction Type:** Interaction Type of the historical interaction (chat, telephony, or email)
- **Status:** Interaction Status
- **Last Business Process:** Business Process the interaction was handled
- **Origin:** Contacts Name and Origin of the interaction
- **Destination:** Original BP destination of the interaction
- **Agent Talk Time**
- **Disposition:** Final Disposition Code given to the interaction

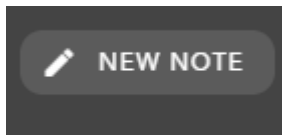
## Notes




Notes are unique and specific remarks about the contact added by agents.

Note history shows:

1. **Agent that added the remark,**
2. **Day the remark was added**
3. **Remark**



To add a new note select . A Add New Note section will open to allow you to enter in a new note. Once you have entered in a note select the add icon to save the note to the contact.

