

Custom attributes in Conversation Manager

ASAPP is introducing a new feature to securely access information about your customers and their experiences. With custom attributes, you can:

- Research issues escalated by customers using their secure account info like email address or phone number
- Segment transcript review by meaningful customer data like customer segment or account status
- Quantify and examine conversations with user experience and session info like the chat initiation URL or skill

Works out-of-the-box

Take advantage of attributes already implemented for routing and agent empowerment, or implement new attributes specifically for customer insights analysis and research. Customer Attributes can come from data integrations or entered manually by customers into ASAPP forms. Speak with your ASAPP representative to learn how you can take advantage of custom customer attributes in Conversation Manager.

Searching for customer identifiers and custom attributes

To retrieve conversations by searching for customer identifiers or custom attributes, head to Conversation Manager and access **Filters** → **Customers**.

Customer ID search

Secure identifier unique to each customer provided by your company. Supported for customers with authenticated sessions. Find all customer conversations for that customer, or combine with additional filters to zero into specific conversations.

NEW! Customer Attributes

Search conversations for attributes specific to the customer's profile and experience. Values entered will remain visible until search filters are cleared.

← Customers X

Customer ID ⓘ

Enter customer IDs

Customer Attributes ⓘ

Select an attribute type:

Personal identifiers ▾

Enter personal identifiers

Personal identifiers

Securely find conversations by using personally identifiable customer information like email address, phone number, or account number. Enter a single, exact value for a max of one attribute. Customer attributes default to this category in the drop down.

Search logic for PII will be exact match to how data was hashed. For example, if a phone number is hashed as 123-456-7890, filter value must be 123-456-7890 rather than 1234567890 or (123) 456-7890. The 'If Queued' filter will be moved from the Customers panel to the Conversations search filters panel.

Non-Personal identifiers

Enter one or more non-personally identifiable value(s) about the customer or their conversation. This category supports simultaneous search of multiple attributes and multiple values using partial value match search and is available as the second option in the drop down.

The screenshot shows a search filter panel titled 'Customers'. It has a back arrow and a close 'X' button. Below the title is a 'Customer ID' field with a help icon and a text input box labeled 'Enter customer IDs'. Underneath is the 'Customer Attributes' section, which includes a help icon and a label 'Select an attribute type:'. A dropdown menu is open, showing 'Personal identifiers' as the selected option with a checkmark, and 'Non-personal identifiers' as another option.

Right-hand Panel

Customer Attributes will be accessible from the `View` button in a new column within the table, with details appearing in the bottom of the right hand panel information details for each conversation. Attributes will appear in the format and order they are configured and will appear regardless if a value is present for the conversation. Personally-identifiable information will be displayed hashed for security purposes. The first 256 characters supported per attribute value.

The screenshot shows a chat conversation with a contact ID '18839183918837186527...'. The chat history includes messages from Paige Powers, Sophie Leonard, and Admin Name. On the right, the contact's name is 'Andrea Ennis' with a timestamp '07/23/2021 09:50 AM'. Below the name is a message: 'I told the customer he needs to pay the 24.78 fee for the late payment'. The 'Customer Attributes' section is expanded, showing three attributes: 'BAN' with a hashed value, 'BTN' with a hashed value, and 'CAN' with a hashed value. Each attribute has a small 'D' icon next to its value.