Greeting and identity verification

Last Modified on 11/23/2026 1:40 pm EST

Reader group: All agents
In a live knowledge base, only signed-in Hootline agents would see this page. It's public in this demo so you can explore.

Greetings by client

Client	Greeting
Crunchbox	"Thanks for calling Crunchbox, this is [name]. What's cooking?"
Pawsure	"Thank you for calling Pawsure, this is [name]. How can I help you and your pet today?"
Brightdial	"Thanks for calling Brightdial support, this is [name]. How can I help?"

Verify before you discuss the account

Ask for **two** of these and match them to the account:

- Full name and email address on the account
- Delivery ZIP code
- Last four digits of the card on file (never the full number)
- Most recent order number

Never read account details out to a caller so they can confirm them. Ask, then match. If they can't verify, you can still give general information, but don't change the account.