

Agent Assist

Agent Assist is an integrated widget within the New Agent Application which facilitates the contact centre agents answer customer queries coming through from various channels more effectively. Currently Puzzel provides Agent Assist feature for queries coming from web chat, incoming phone call, SMS and email channels only.

To be able to expertly resolve the issues, Agent Assist guides the agents by displaying all the customer information in one place so that the agent can relate them to provide the most definitive solution.

There are two key components that come as a default with the Agent Assist:

1. Contact Card
2. Interaction History

There are further three components that come as a subscribed addon with the Agent Assist:

1. Transcription with Natural Language Understanding and unsigned sensitive data in the chat history
2. Chatbot suggestions
3. Knowledgebase suggestions

Note

Automatic suggestions is only available in the Interaction Analytics package and on the Chat channel.

The base components form the basis of Agent Assist whereas the addon components extend the capability and usefulness by adding more functionality with the purpose of making you empowered in serving the customers more efficiently.

Basic features

This section explains the two basic components of Agent Assist feature which are:

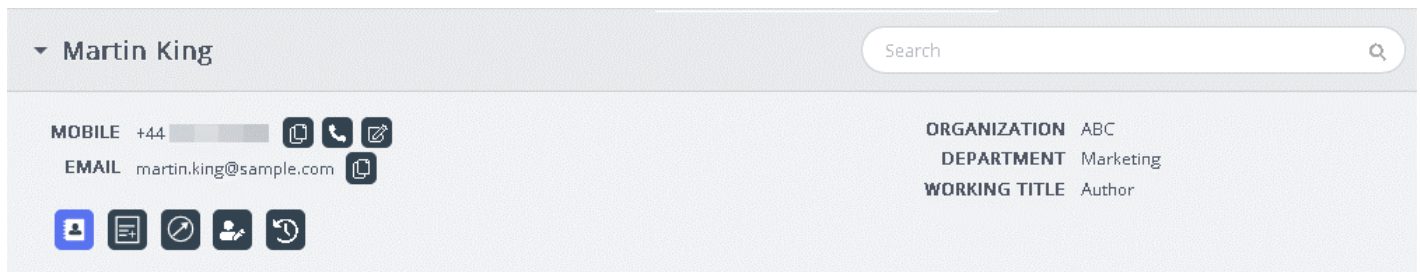
- [Contact Card](#)
- [Interaction History](#)

Contact card component

The customer details are searched, retrieved, and displayed to you in the format as shown in the picture below. It consists of full contact details including phone, email, organization, department, address information and all other fields that have value in them.

Note

Only fields that have values in them will be displayed



▼ Martin King

Search

MOBILE +44 [copy] [phone] [edit]

EMAIL martin.king@sample.com [copy]

ORGANIZATION ABC

DEPARTMENT Marketing


WORKING TITLE Author

[profile] [list] [refresh] [edit] [share]

On an incoming request, the customer's number or email address is passed to the contact card component to be searched for a matching record. There can be three outcomes to the search results and the specifics of each are as listed below:

1. Single contact match: Full customer details will be displayed within the widget
2. Multiple match found: A list will be displayed for you to choose from. You can go back to the list at any time by pressing the back button provided in the widget. Also a search can be performed to look for a contact from within the loaded results.
3. No contact match: The phone number/ email id that the customer is using to communicate will be listed along with the interaction history of the corresponding number/id. No match situation arises when the contact card does not exist, or it has not been imported properly.

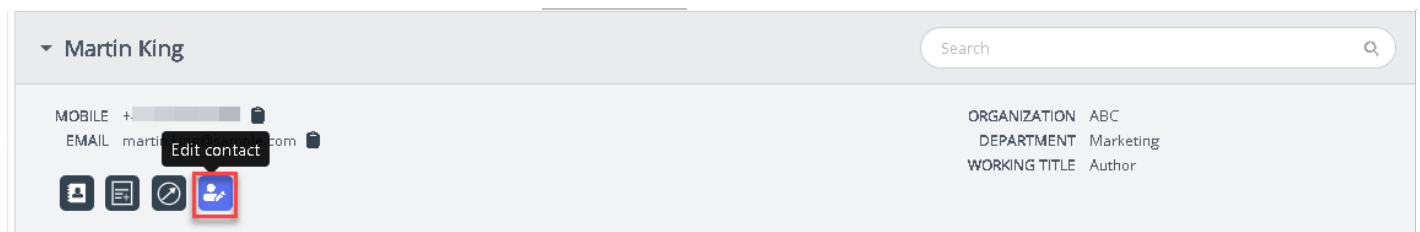
Note

Both the phone and email information can be copied to the clipboard by clicking the  icon next to it

Adding and editing contacts

If enabled by the admins, agents can add a new contact card information or edit the existing one.

To edit the existing contact card information, click on the Edit contact icon as shown in the picture below.



▼ Martin King

Search

MOBILE + [copy]

EMAIL marti [copy]

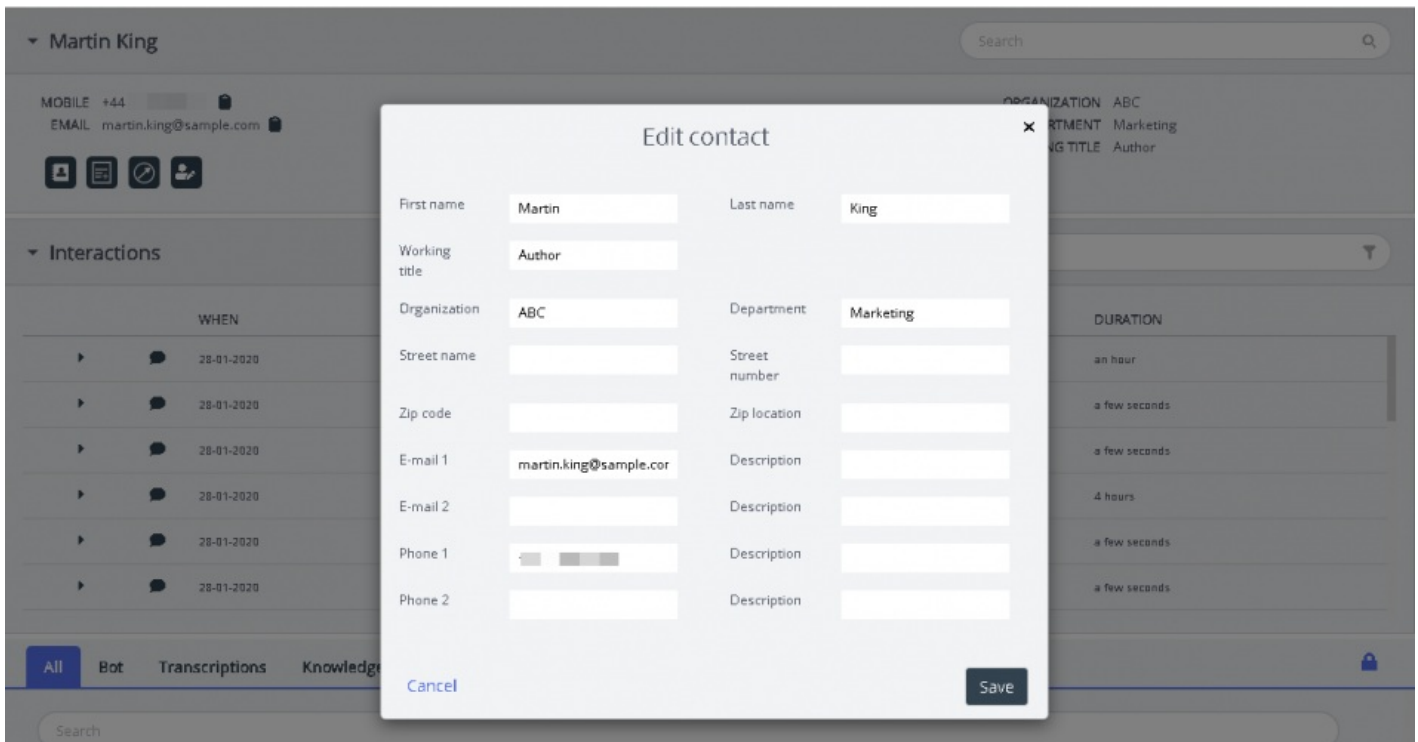
ORGANIZATION ABC

DEPARTMENT Marketing

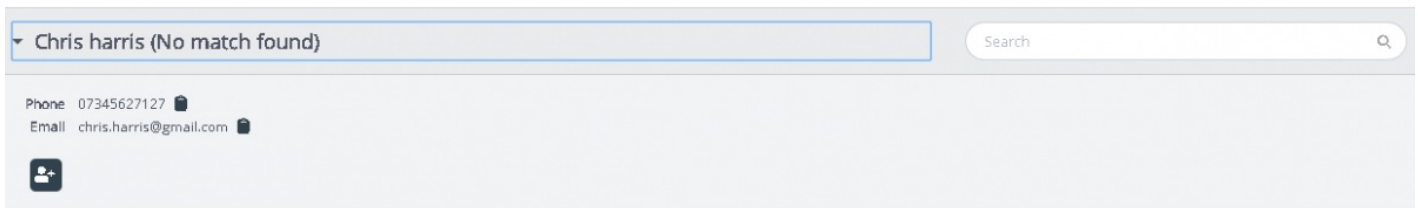
WORKING TITLE Author


[profile] [list] [refresh] [edit] [share]

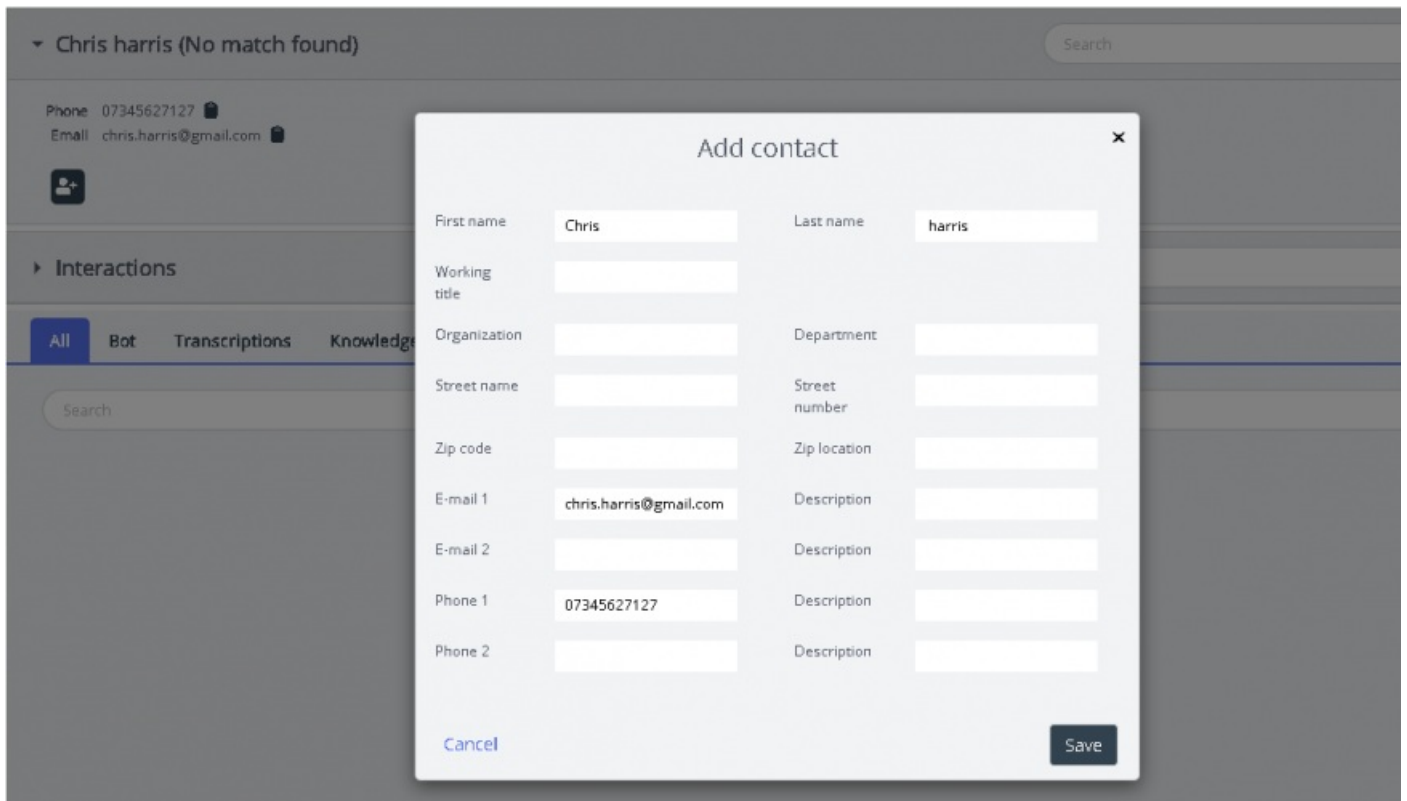
The edit contact window will appear populated with the existing customer details. You can make the necessary changes and click on **Save**.



If the contact information was not found, the agent will have an option to create or add a contact card as shown in the picture below.

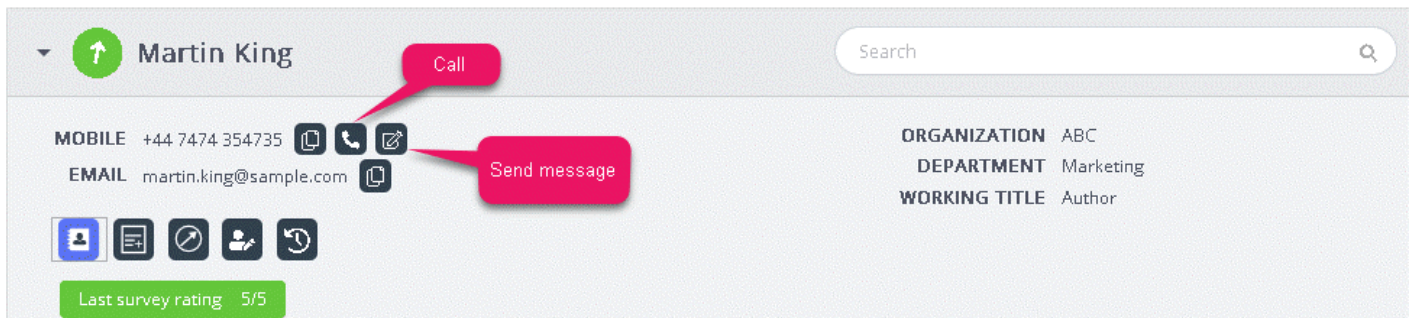


By clicking on the Add contact icon , the Add contact window will be opened. Enter all the personal details and click on **Save**.

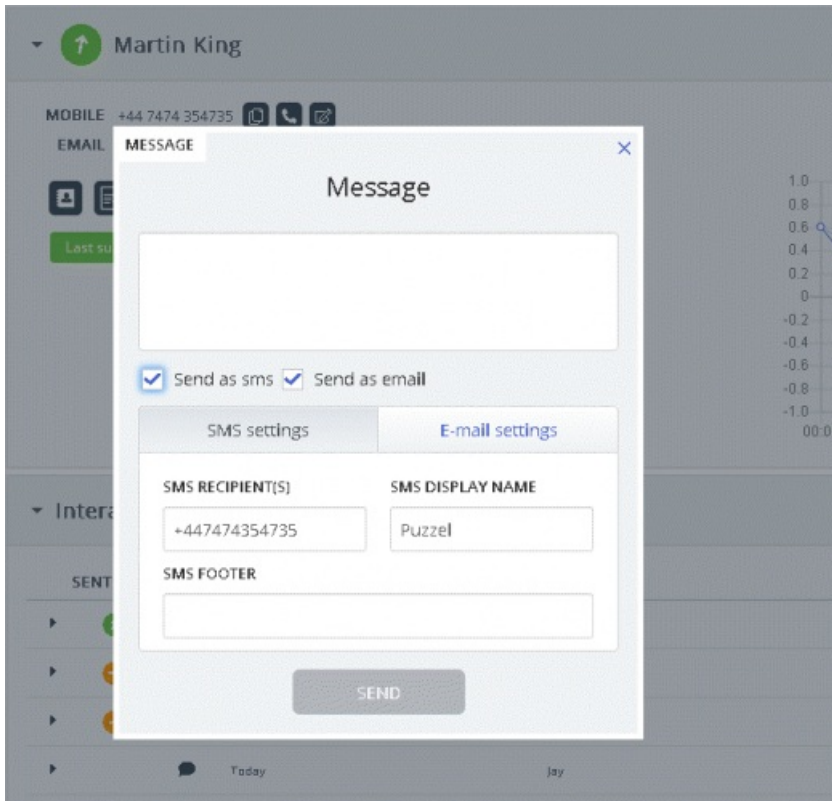


Callout to the customer

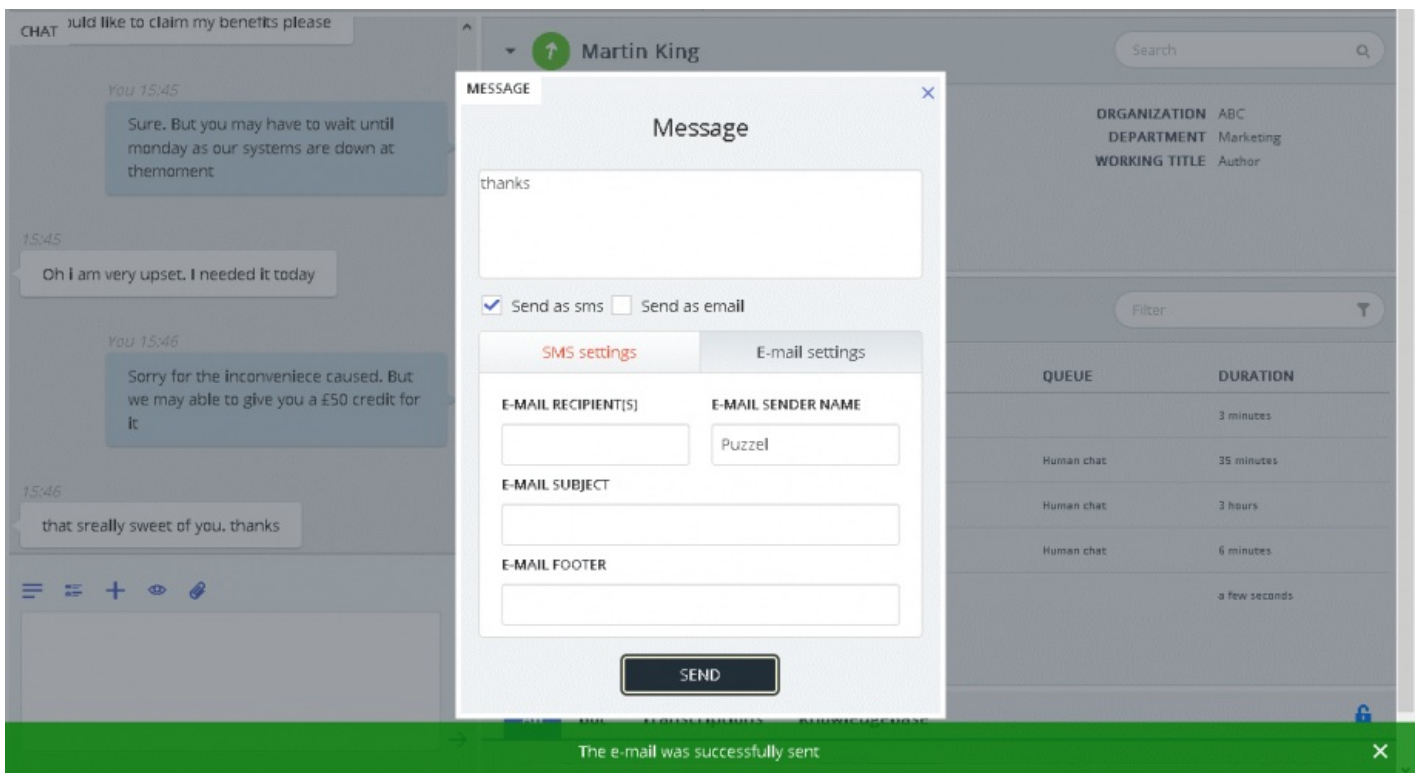
Agents can now send information via SMS or email to the customer during or after the interaction by clicking on the icon as shown in the picture below. Please note that the email/SMS service must be configured to your solution to be able to use this feature.



On clicking on the send message icon, the message window will pop up, populated with the available customer details as shown.



Agent can enter the message and choose to send via SMS or email and click **Send**. A confirmation message will be shown as below.



Agents can also choose to make calls to the available number in the contact card by clicking on the click to call icon.

Viewing or adding a note

You can view historical notes to yourself or from other agents by clicking on the icon shown below. This provides a list, sorted from newest to oldest including the date, time, name of agent who created it and a snippet of the note content. You can click the note text to see the full note text.

Notes from agents

DATE	AGENT	NOTE
a few seconds ago	Jay	this is a second note
43 minutes ago	Jay	This is a note to Jay

You can also edit/delete a note of your own if this feature has been configured for your solution. To edit a note, go to list view and select the note you wish to edit. You can either make changes and save it or delete the note altogether.

NOTE

This is a note to Jay

DATE
a few seconds ago

AGENT
Jay

[Back](#) [Delete](#) [Save](#)

Note

You can only edit or delete notes created by yourself. The notes created by other agents will be in read-only mode

Customer journey indicator

This is a graphical representation of customer navigation within the website. This will help agents to analyse if the customer is looking into the right webpage and direct them to the right one if necessary.

Chatter: Connected with you

Entered queue: Human chat

16:33 Browser activity: [Contact us](#)

16:33 Browser activity: [Contact us](#)

Interaction history listing

The Interactions window provides a list of interactions from the customer via different channels with the latest interaction listed on top. You can then search or filter the list based on agent name and queue type. Upon clicking on the interaction in the list, you will have an option of viewing the details for the selected result.

Viewing interaction history

The interactions panel lists historical entries in rows that can be expanded for additional information contained within the individual entries.

SENTIMENT	WHEN	AGENT	QUEUE	DURATION
7	04-06-2020	Jay	Human chat	3 minutes
<p>Tags: s agent, projects agent, br, coudnt happier thanks, service, charges, innovation</p> <p>Survey: ★★★★★ brilliant service</p> <p>View transcript</p>				
	04-06-2020	Jay	Human chat	35 minutes
	04-06-2020	Jay	Human chat	3 hours

By default, the following columns are listed for each entry:

- **SENTIMENT:** It is an average sentiment indicator of the customer in that interaction. This icon is only visible if conversations were analysed through the Interaction Analytics package.
- **WHEN:** This is an indicator of when the interaction was initiated. Interactions older than yesterday will have the date listed here.
- **AGENT:** lists the agent/agents involved in the interaction. By default, the last agent who interacted with the customer is listed.
- **QUEUE:** Shows the queue from which the interaction was initiated and handled. If more than one queue was involved, the last queue name is shown by default.
- **DURATION:** shows the length of the conversation.

Note

The icon next to the sentiment indicator shows the channel in which the interaction took place

If you have Interaction Analytics package enabled, the interaction history will further show auto generated tags from the conversation to quickly highlight the content without having to read the entire transcript.

Filtering interaction history

You can filter the interactions based on channel type, agent name and queue description. The filter operation can only be performed within the loaded result list.

Viewing survey

If this feature is enabled for your solution, and the survey had been completed by the customer, then the related survey

details for the interaction will be displayed along with customer comments. You can click on the comments to expand and read the full comment from the customer.

Interactions					
SENTIMENT	WHEN	AGENT	QUEUE	DURATION	
Survey ★★★★★ Fantastic service	Today	Jay		35 minutes	
					View transcript

Note

Display of survey scores is a configurable feature and may be hidden from agents based on local business requirements.

Viewing enquiry registrations

If your solution is configured for enquiry registration, the interaction detail view displays any registration details that may exist for that interaction. In cases, where an interaction has been handled by multiple agents and/or in multiple queues, all resulting registrations are made visible along with comments written by the agents.

Viewing transcripts

Interactions					
SENTIMENT	WHEN	AGENT	QUEUE	DURATION	
Survey ★★★★★ Fantastic service	Today	Jay		35 minutes	
					View transcript
Enquiry registration	Agent	Queue	Category	Topic	
October 8, 2019 8:30 PM	Tracy H	Sales Chat	Reason for Call Related Products	New Account Microsoft Dynamics	

This option is available as a default and is only available for interactions performed via web chat. View transcript option when clicked, opens a new tab below the interactions panel which displays the chat transcript as it was recorded.

Advanced features

The advanced, artificial intelligence powered, Interaction Analytics module from Puzzel is a progressive segment of the Agent Assist feature. It encompasses of three addon components along with a sentiment indicator and an unsigned transcription history to preserve the integrity of the customer.

There are three addon components as listed below:

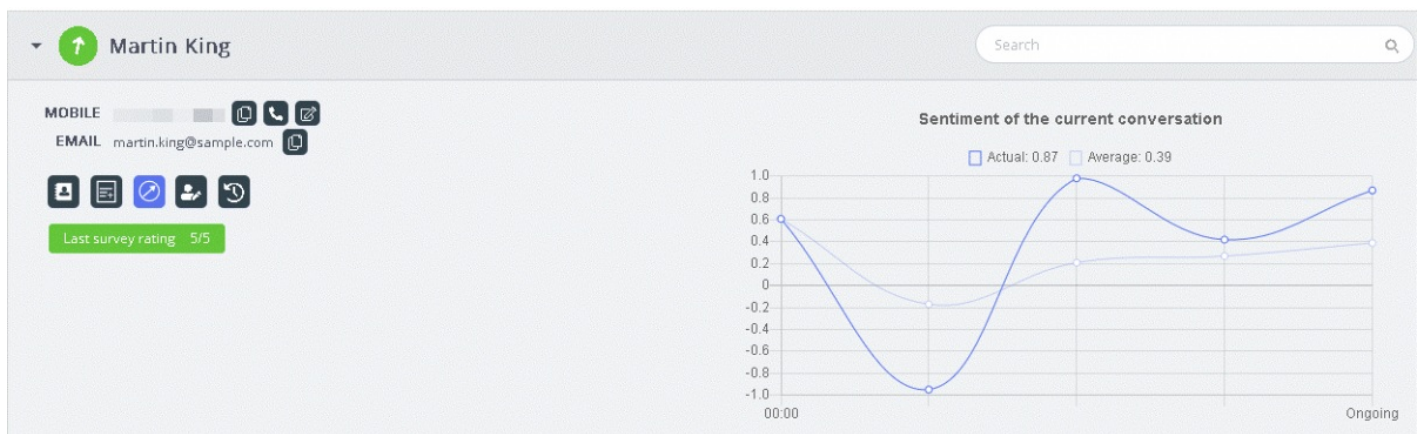
- Bot
- Transcriptions
- Knowledgebase

The useful suggestions coming from these three sources will enhance and enrich the agent experience in providing a satisfying customer support.

Before we step into learning the addon components, lets focus on the key changes made to the base components when subscribed to the Interaction Analytics Module. The value-added features that comes with this module is the sentiment indicator in the contact card component and the anonymized interaction history.

Analysing customer sentiment

A graphical indicator of the customer sentiment is shown in all interactions to get a feel of customer's happiness index. This will aid you in interacting with the customer on an ongoing interaction. The background colour of the icon represents the sentiment: Green if positive, Amber if neutral, and Red if negative. The arrow within the icon indicates the trend.



Two types of analysis are being performed here:

1. Analysis on the immediate interaction [Actual]
2. Analysis on the entire interaction since it was initiated [Average]

The **Actual** graph is based on the immediate sentiment and the **Average** graph is formed on the consolidated interaction since it was commenced, and the result is an aggregated value. This is done to ensure that the analysis is done contextually.

Note

The most recent survey result is flashed in the contract card to get an essence of customer sentiment

View transcripts

If you are subscribed to the advanced Agent Assist feature, the interactions will be anonymized to mask the personal details

mentioned during the interaction. When you click on the View transcript option, you will be presented with unsigned interaction history readily tagged for keywords and phrases which will be used in providing suggestions for similar query.

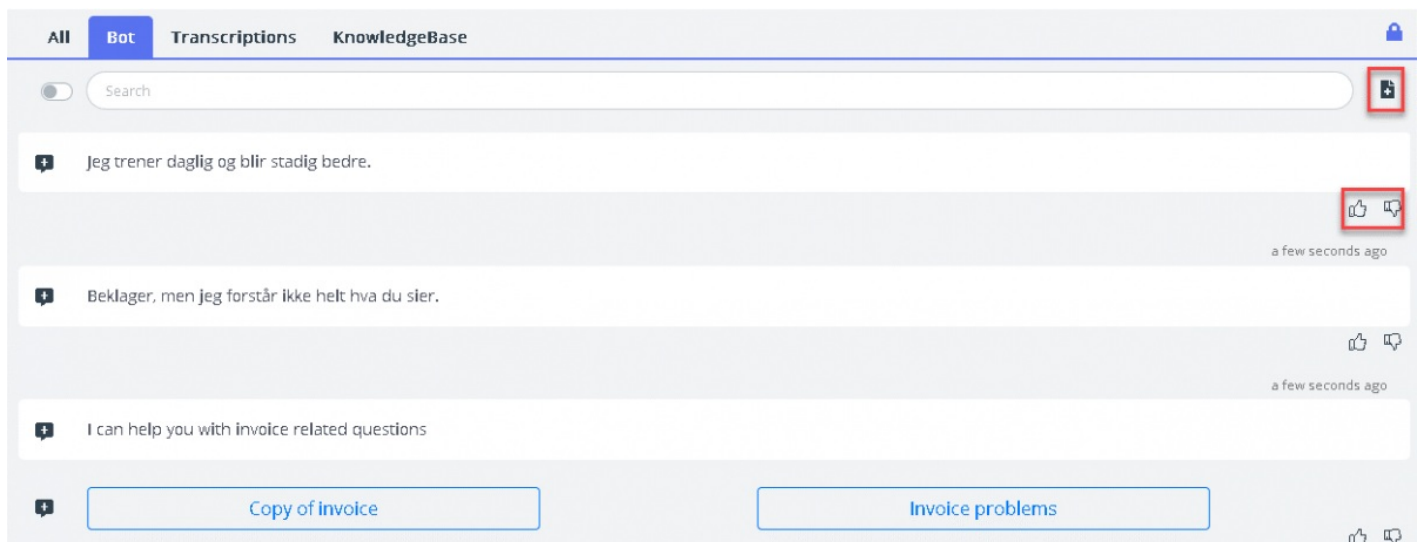
Bot suggestions


The suggestions coming from Bot can either be automatic or manually searched. The automatic suggestions are a result of the Bot's understanding of the query. If the suggestions are not relevant to the query, you can choose to manually search using the search tab.

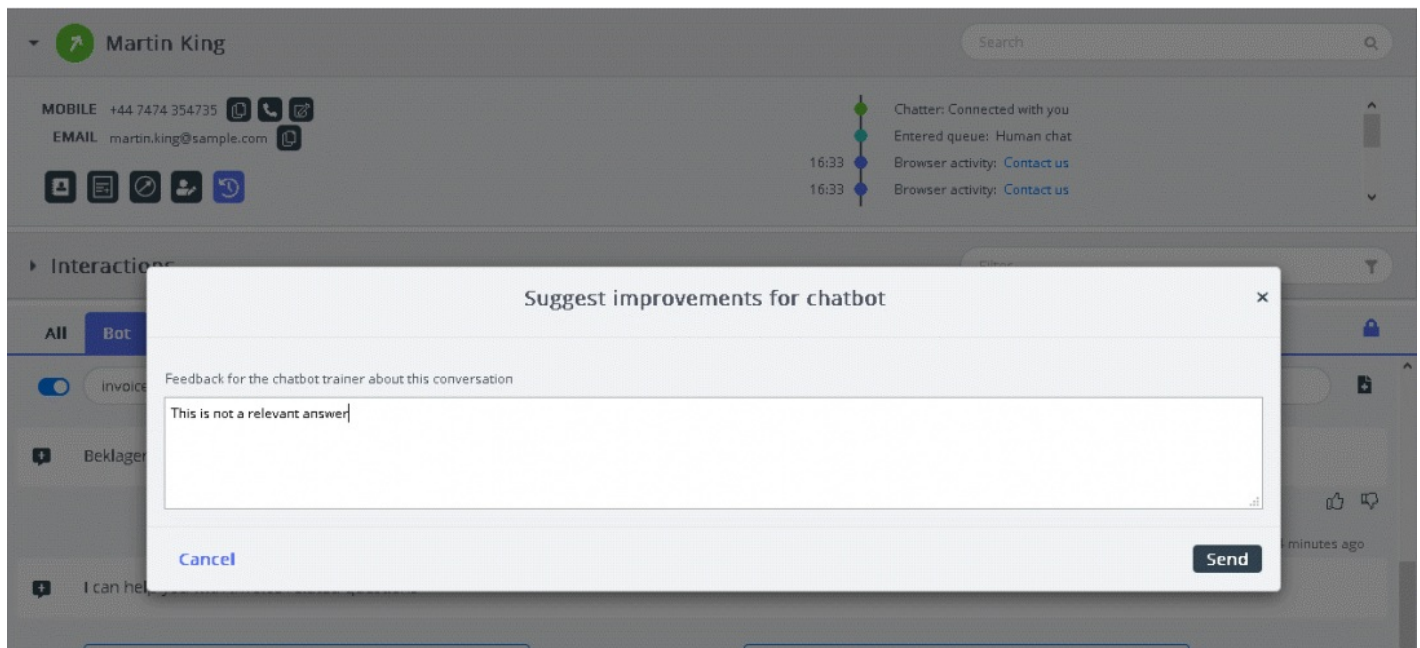
Automatic bot suggestions

You can get automatic suggestions to customer query from the Bot. All incoming messages from the customer are automatically relayed to the chatbot for a suggestion. Responses from the chatbot can be of the following four types:

- Text responses
- Button responses (to allow you to choose from options)
- Links
- Actions (to perform actions through integrations)

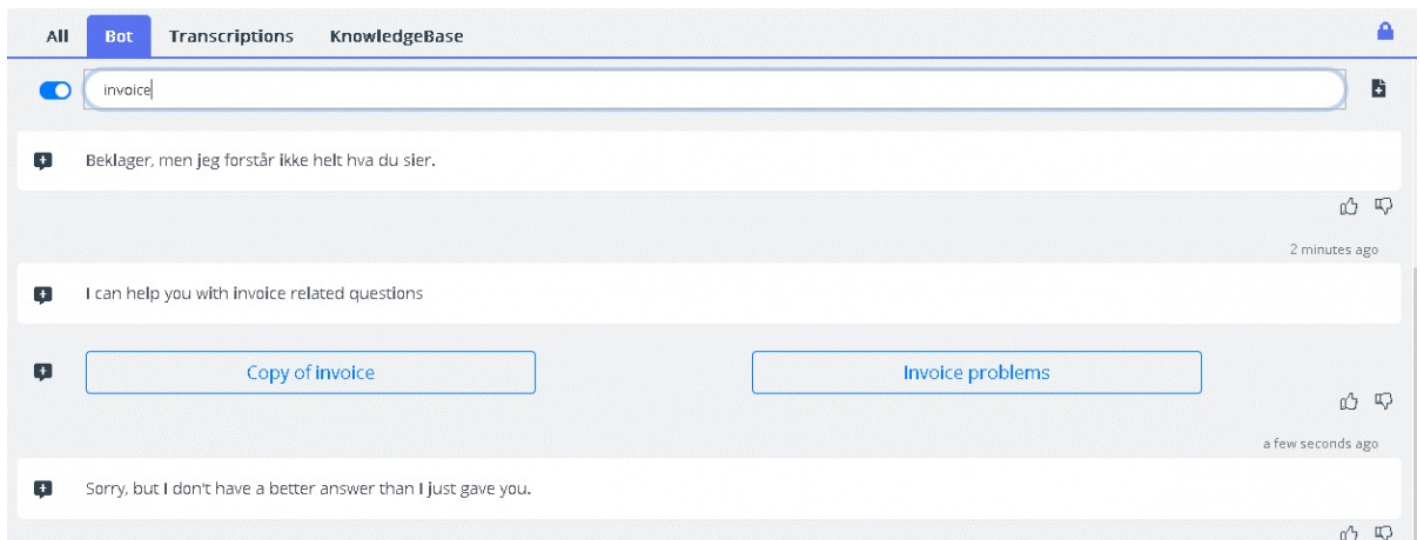


Agents can vote by clicking on the thumbs up/down button on each of bot results to provide a feedback to the bot trainer. This helps in analysing and improving on Bot search results. You can also suggest the bot trainer for any articles to be included on a certain topic by clicking on the  icon next to the search bar. A new window will appear for you to enter your feedback and send it to the Bot trainer.



Manual search

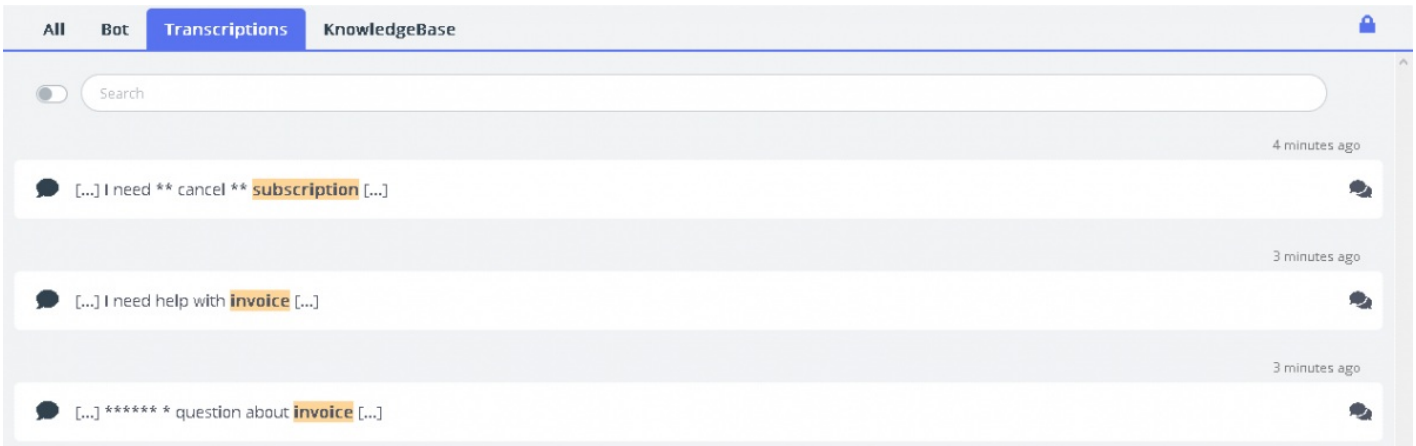
You can also perform a manual search for suggestions which temporarily deactivates the automatic Search. No further automatic searches will be performed until you toggle the button located to left of the search bar.



Suggested responses from the chatbot may be pushed to the customer using the arrow on the left of the suggested messages. This pushes the suggestion into the chat window where you can edit it, if required, before sending it to the customer. Button options here can also be pushed to the customer chat window, however you will not be able to edit these.

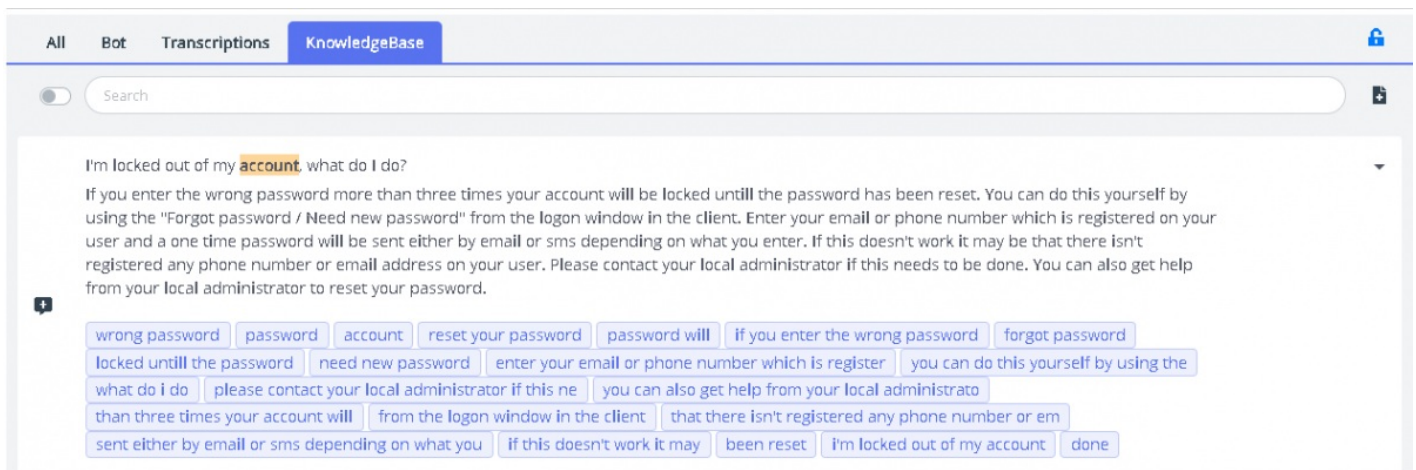
Transcriptions

These are suggestions from the anonymized interaction history for a similar query. This will help you to respond to queries of similar type much faster. You can open the full transcript by clicking on it. Matched keywords are shown as highlighted text, and you can filter the entire conversation using free-text to specific parts of the conversation.



Knowledgebase

On an ongoing chat, you can receive suggestions from the knowledgebase for a customer query. The query is automatically analysed to extract best matching suggestions from the knowledgebase content. A list of three most significant articles are presented to you for review and use. You can then use this article/s as a response to the customer query by clicking on the icon or make changes to it before sending it to the customer.



If the Knowledgebase article has any supported attachments, it will be available for the agents to download by clicking on the attachment. Agents can also make the attachment available for the customer by clicking on the copy link icon and pasting the link on a chat window, email or in an SMS message. This link will be available to the customer to view the document for 48 hrs before it expires.

Martin King Search

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 DEPARTMENT Marketing
 WORKING TITLE Author

Interactions Filter

SENTIMENT	WHEN	AGENT	QUEUE	DURATION
	02-07-2020			a few seconds
	02-07-2020	Jay	Human chat	a few seconds
	02-07-2020			a few seconds
	01-07-2020	Jay	Human chat	21 hours
	08-06-2020			a few seconds
	04-06-2020	Jay	Callout	a few seconds
	04-06-2020	Jay	Callout	a few seconds

All Bot Transcriptions **KnowledgeBase**

Search

Call us and we will help you find the best deal.

[2] best deal.docx another deal.docx

If the Knowledgebase article has any related articles mapped to it, it will be available for the agents to view by clicking on the item displayed in the list view. The count within the brackets denotes the number of articles that are to be found in the list.

All Bot Transcriptions **KnowledgeBase**

Search

a few seconds ago

Article 2
 And here is article 2

(0) article

(1) Article 1

You can also use the search box within the Knowledgebase panel to manually search for an article. Since manual search deactivates the automatic search you will have to toggle the button to resume automatic search. The advanced search capability does a morphological analysis of words being searched and provides better results. For example; the word 'copy' will get results also for 'copies' and 'copying'.

All Bot Transcriptions **KnowledgeBase**

12 minutes ago

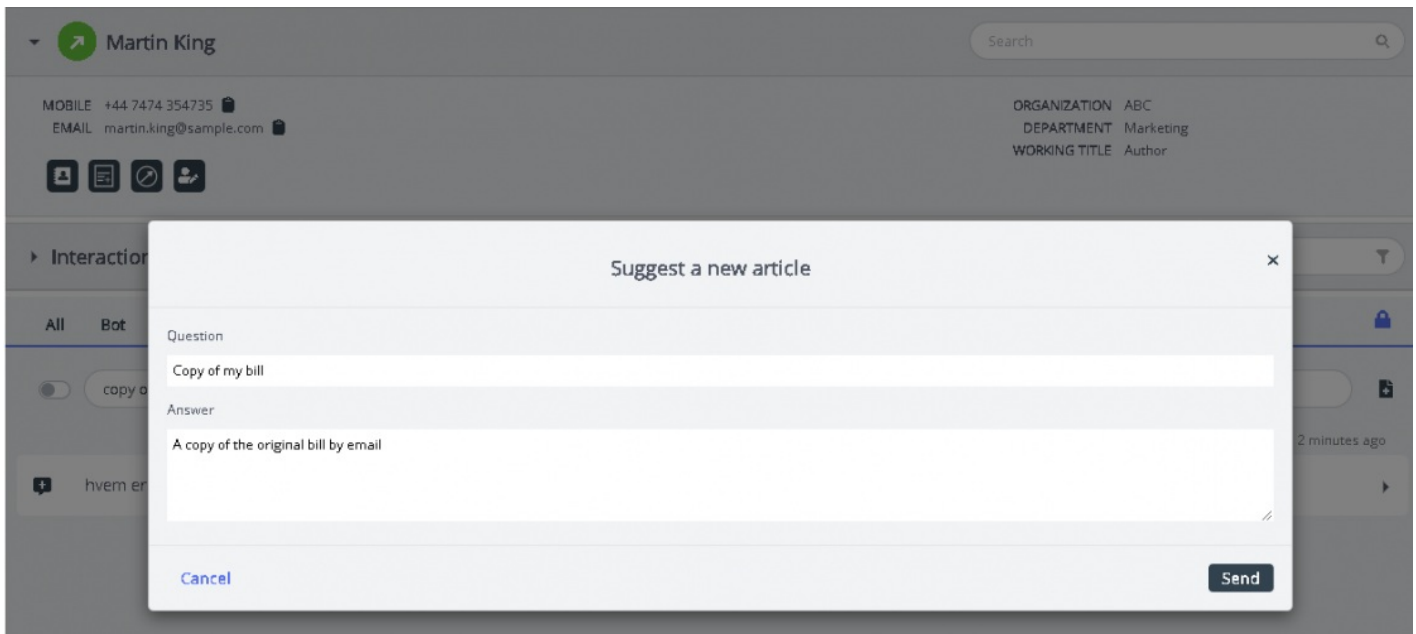
Copy of my bill

12 minutes ago

hvem er bill gates

Suggesting Knowledgebase articles

Agents can also suggest articles to be included in the Knowledgebase. Click on the icon in the right of the search box to open the **Suggest a new article** window. Enter the question and relevant answers and click on **send**.



The suggested article will be sent to the inbox of the Knowledgebase Management system for Admin's approval.

All tab panel

The **All** tab panel displays a combination of suggestions gathered from all sources subscribed by the customer. When a query comes in from a customer, this window displays search results gathered from multiple sources to present the most relevant and appropriate actions. In the example shown below, the results are from different sources as shown below:

- the bot offers a suggestion with a dialogue for further clarification
- transcripts from similar interactions that may contain an answer to the present query
- an article from the knowledgebase which also relates to the question asked.

You may choose from any of these suggestions and proceed accordingly.

Interactions Filter

All Bot Transcriptions KnowledgeBase

Search

Bot Transcriptions KnowledgeBase

Transcriptions 22 minutes ago

[...] how ** i get * **copy** of ** ***** please? [...]

Bot 25 minutes ago

I can help you with invoice related questions

[Copy of invoice](#) [Invoice problems](#)

KnowledgeBase 25 minutes ago

Copy of my bill

The suggestions in the 'All' tab is completely automated and updates with the ongoing conversation. New suggestions are added to the stack and automatically scrolls down until you manually interact within the panel by scrolling or selecting one of the items. Scrolling to the bottom re-activates the auto-scroll.

If you are focused elsewhere [on another tab or application], the suggested results from different sources or the 'new messages' are clearly marked as shown below.

Martin King Search

Interactions Filter

All Bot Transcriptions KnowledgeBase

Search

Bot Transcriptions KnowledgeBase

KnowledgeBase an hour ago

← **How** do I buy a private insurance? →

Bot an hour ago

← Sorry, but I do not have a response to what you asking for.

Bot an hour ago

← Det gjør du ved å følge instruksene.

KnowledgeBase an hour ago

← Article A →

new messages

KnowledgeBase a minute ago

← I'm locked out of my account, what do I do? →

Bot a minute ago

← I don't understand your question. Can you try again?