



Foundation Agent Assist

Agent Guide v1.2.0

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1 Introduction

This guide introduces a suite of capabilities designed to elevate the quality and efficiency of customer interactions. By combining real-time guidance with automated knowledge delivery, the Foundation Agent Assist tool ensures agents have the most accurate information.

1.1 Key Benefits

- **Real-time Actions:** Provides coaching prompts and recommended responses during live customer interactions.
- **Automatic Call Listening:** Listens bi-directional during calls. It analyzes conversations in real-time to offer support.
- **Knowledge Suggestion:** Suggests relevant knowledge base articles to improve response accuracy.
- **Real-time Transcription and Sentiment:** Captures full conversation transcripts with line-by-line sentiment analysis and an overall call sentiment.
- **Interaction Notes:** Generates structured notes at the end of interactions.
- **AI Generated Summary:** Provides an AI generated summary for every call, simplifying your wrap-up process.

2 Access Foundation Agent Assist

2.1 Log In and Set Status to Receive Calls

Logging into your contact center platform is the first step you must take before accessing Foundation Agent Assist. Log in using your credentials and then set your status to start receiving calls. This also enables you to sign into Foundation Agent Assist and assist customers.

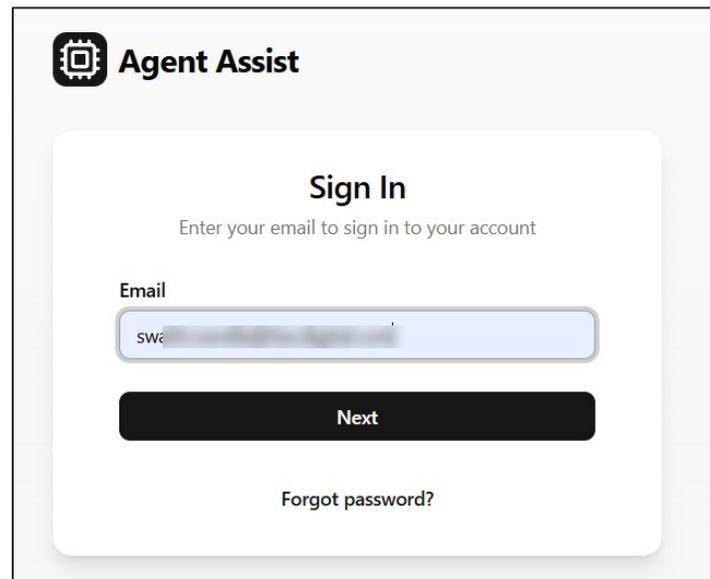
Note: Login processes differ by contact center platform. Refer to your training resources or contact your manager for specific login and status-setting instructions.

1. Log into your contact center platform.
2. Set your status to a **Ready** state.
3. You are now in queue and ready to take customer phone calls.

2.2 Log Into Agent Assist

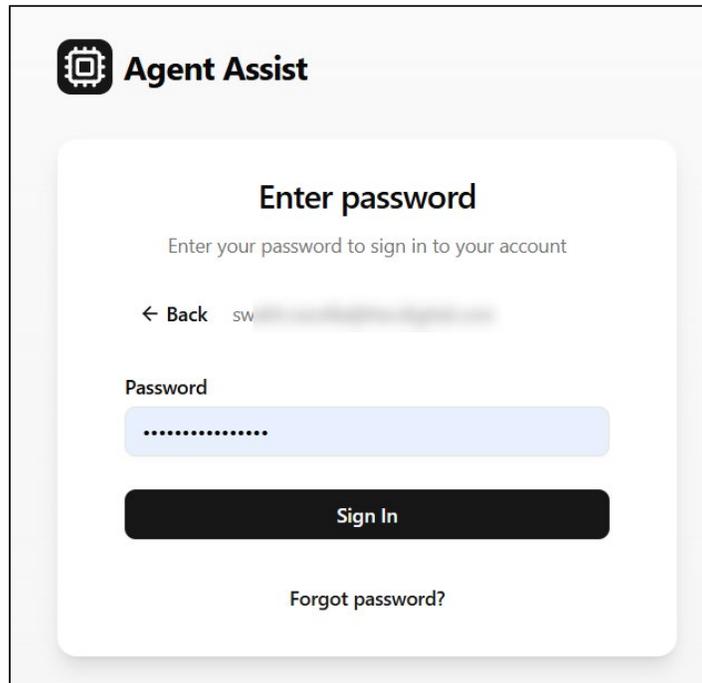
After logging into your contact center platform and setting your status, log into Foundation Agent Assist. This could be with a direct link, through your contact center platform, or through your Customer Relationship Management (CRM) system. Please reach out to your manager for the appropriate way to log in for your organization. This grants access to its call-handling features.

1. Enter your email address.
2. Click **Next**.



The screenshot shows the 'Agent Assist' login interface. At the top left is the 'Agent Assist' logo. The main heading is 'Sign In', followed by the instruction 'Enter your email to sign in to your account'. There is an 'Email' label above a text input field containing the text 'sw@'. Below the input field is a black button labeled 'Next'. At the bottom of the form is a link that says 'Forgot password?'.

3. The Password field auto-populates through SSO authentication.
4. Click **Sign In**.

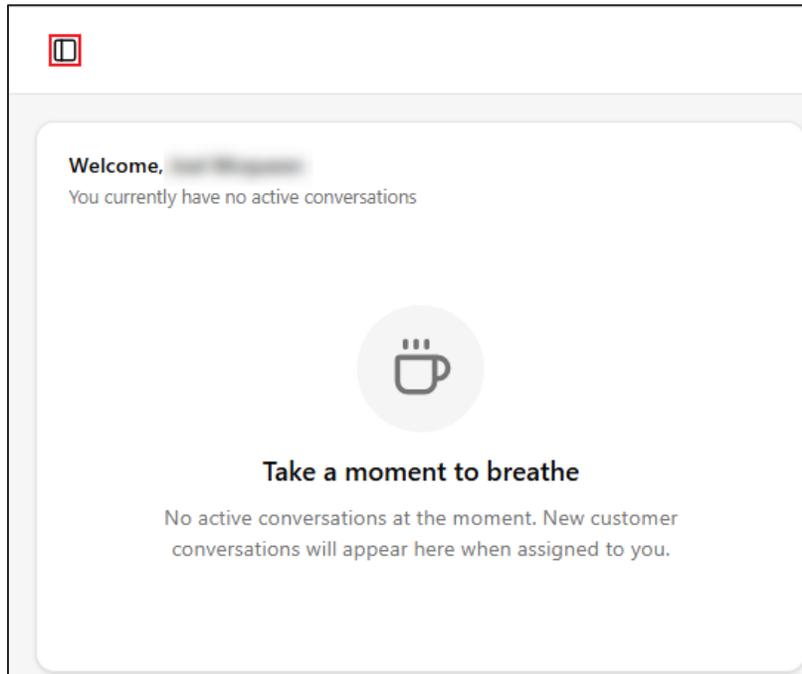


The image shows a login interface for 'Agent Assist'. At the top left is the 'Agent Assist' logo, which consists of a gear icon with a square inside, followed by the text 'Agent Assist'. Below the logo is a white rounded rectangle containing the login form. The form has a title 'Enter password' and a subtitle 'Enter your password to sign in to your account'. There is a back arrow and the text 'Back SW' followed by a blurred area. Below that is a 'Password' label and a light blue input field containing ten dots. A black 'Sign In' button is positioned below the input field. At the bottom of the form is a link that says 'Forgot password?'.

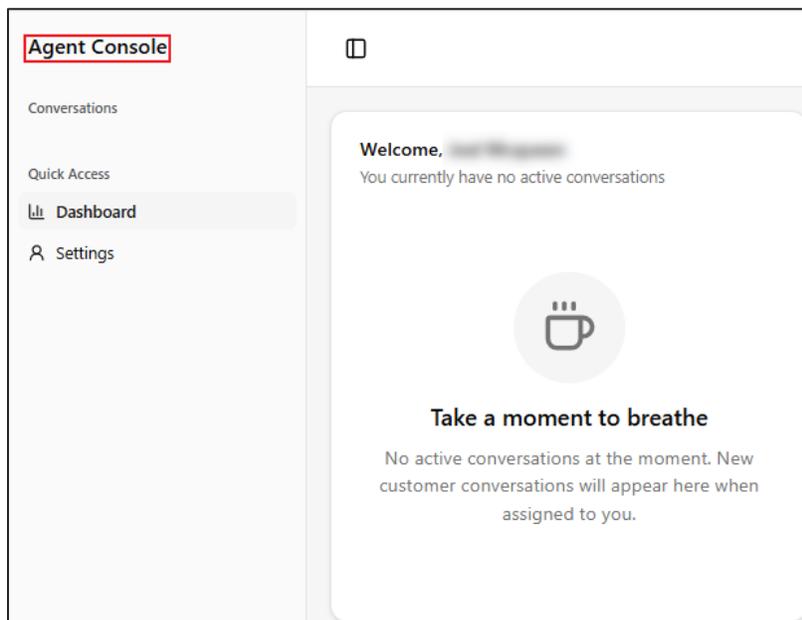
3 Getting Started

Upon logging into Agent Assist, the agent interface displays a welcome message and an overview of conversation activity. This topic guides you through navigating and using the Agent Assist interface to help you maximize its call management capabilities.

Click the **Toggle Sidebar** icon in the top-left corner for the Agent Console view and to check on the conversations as call arrives.



Agent Console View



4 Voice interactions

An incoming alert appears in the Agent Assist user interface. Upon accepting the interaction, Agent assists loads in with the features provisioned by your organization.

4.1 Agent Assist

4.1.1 Knowledge Assistant

The Knowledge Assistant suggests articles in real time, aligned with the context of the conversation. When a customer's statement matches content from Knowledge base, the system highlights a suggestion above the Agent Assist panel. 1.

1. Click **View** or click on the **Knowledge Assistant** tab to review the suggestions.
2. Select **View Source** to preview the article pulled from the knowledge base.
3. Alternatively, click the **Open Source** button to launch the article in a separate browser tab for full review.
4. Use the **Search knowledge base** field to filter the knowledge articles.

The screenshot displays the Agent Assist interface. On the left is the 'Agent Console' sidebar with 'Conversations' (showing 'John Doe') and 'Quick Access' (Dashboard, Settings). The main area shows a conversation with 'John Doe' (Agent Assist ID: 019c1f2f-eb12-7216-a95b-9c0c0d6cb79a). Below the conversation header, there are tabs for 'Agent Coaching' and 'Knowledge Assistant'. A search bar labeled 'Search knowledge base...' is highlighted with a red box and a '4' in a red circle. Below the search bar, a knowledge article is shown with a 'High Match' badge and 'Confidence: 100%'. The article text is: 'To troubleshoot account access issues, you can perform several checks. For SMETS2 meters, access the customer's meter details in the diagnostic tool to check the "Last Communication Date/Time," "Signal Strength," and "Daily Read Status". If the issue persists, you can attempt a remote reboot of the Communications Hub.' Below the article, there are three buttons: 'View Source' (highlighted with a red box and a '2' in a red circle), 'Copy', and 'Open Source' (highlighted with a red box and a '3' in a red circle). A red box with a '1' in a red circle highlights the 'Knowledge Assistant' tab.

4.2 Call Transcript

The Call Transcript feature displays customer interactions in real time and displays sentiment analysis. As the conversation is happening, both the customer and agent sides of the conversation are automatically transcribed into text, allowing agents to view the live call flow and key details instantly.

1. Click the **Call Transcript** icon on the left vertical pane to view the transcript.
2. The **Sentiment Analysis** feature evaluates the caller's tone and displays a colored smiley icon that reflects the overall sentiment during the call.
 - **Green** (😊): Shows a positive tone, suggesting the caller is happy or satisfied.
 - **Orange** (😐): Reflects a neutral tone, suggesting the caller is calm or indifferent.
 - **Red** (😞): Represents a negative tone, alerting the caller is upset or dissatisfied.
3. Use the **Search in transcript** field to filter the transcripts.

The screenshot shows the Agent Console interface for a call with John Doe. The transcript is as follows:

- Agent** 11:29 AM: Hi there! How can I assist you today?
- Customer** 11:30 AM (Sentiment: Orange 😐): Hello! I'm having trouble with my account. Can you please assist?
- Agent** 11:32 AM: Absolutely! I'm happy to help. Can you please describe your issue?
- Customer** 11:32 AM (Sentiment: Red 😞): I'm unable to access my account.
- Agent** 11:33 AM: What is the username associated with your account?
- Customer** 11:34 AM (Sentiment: Green 😊): It is johndoe. I really appreciate you taking the time to help me with this!

4.3 Conversation Notes

Notes

Notes are automatically generated when either the agent or the customer ends the call. It provides a detailed post-call overview. However, notes are not generated if there is insufficient information.

1. Click the **Conversation Notes** icon on the left vertical pane to view the generated notes.
2. The fields found under **Conversation Notes** are configurable by your organization. You may not see all of these fields appear on your Notes screen.

- **Copy** (): Click to duplicate the current interaction notes for reuse or reference.
- **Recreate Summary** (): Click to auto-generate a new version of the notes based on existing data.
- **Situation**: Describes customer's reason for contacting your organization and working with the agent.
- **Action**: Lists the steps the agent took during the call.
- **Resolution**: Summarizes how the inquiry was resolved.
- **Customer Satisfaction**: Indicates customer's satisfaction.
- **Reason for Cancellation**: States the reason for cancellation.
- **Reason**: Capture the primary purpose of the customer's inquiry.
- **Key Details**: Log important information provided by the customer.
- **Outcome**: Note the status of the inquiry.
- **Follow Up**: Indicate whether a follow-up action is required.
- **Next Step**: Define what actions the agent should be followed.
- **Sentiment**: Record the overall tone of the customer during the interaction.
- **Tags**: Assign relevant keywords to categorize the interaction.
- **Entities**: Identify and record specific names, locations, or other distinct data points mentioned.

The screenshot displays the 'Agent Console' interface. On the left, a sidebar contains 'Conversations' with a card for 'John Doe' and 'Quick Access' with links to 'Dashboard' and 'Settings'. A red circle with the number '1' highlights a sun icon in the sidebar, which is the 'Create Conversation Notes' button. The main area shows a conversation with 'John Doe' (ID: 019c1f2f-eb12-7216-a95b-9c0c0d6cb79a). A 'Notes' section is open, containing a 'Conversation Notes' form. The form has a title 'Conversation Notes' and a subtitle 'Edit and save notes about this interaction'. It includes several text input fields: 'Situation' (containing 'The customer is unable to access their account.'), 'Action' (containing 'The agent unlocked the customer's account.'), 'Resolution' (containing 'Y'), 'Customer Satisfaction' (containing 'N'), and 'Reason For Cancellation' (containing 'N/A'). Below these is an 'Entities' section with a 'Username' field containing 'johndoe'. A red circle with the number '2' highlights the 'Resolution' field.

Note: Agents can also create notes manually at any time during the call by clicking the **Create Conversation Notes** button.

5 Revision History

Date	Description of Change
January 30, 2026	Updated screen shots.
October 27, 2025	Creation of document.