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Angel Associate Assist

Supervisor Guide

2025

CX Optimized

Table of Contents

Introduction **1**

Key Supervisor Benefits and Features 1

Access Associate Assist **1**

Log Into Associate Assist 1

Supervisor Dashboard Overview **4**

Associate Assist Supervisor User Interface 4

Navigation Bar 5

Change View 6

Filter Drop-down 7

Search Field 8

My Agents Tab 8

Active Calls Tab 9

Pagination Controls 10

Using Associate Assist **11**

My Agents Tab 11

Active Calls Tab 11

Monitor Agents **12**

My Agents Tab Overview 12

View Agent 14

Call History 14

Monitor Active Calls **15**

Active Calls Tab Overview 15

Active Call Details 16

Live Call 17

Assist Details Tab 18

Transcript Tab 23

Introduction

Welcome to the Angel Associate Assist Supervisor Guide, your go-to resource for mastering the Associate Assist tool. Whether you're an agent handling customer calls or a supervisor supporting your team, this guide provides clear steps and insights to streamline your workflow, enhance call efficiency, and leverage real-time AI support in the contact center.

Key Supervisor Benefits and Features

Angel Associate Assist equips supervisors with a comprehensive set of tools within the Supervisor Dashboard to oversee agent performance, monitor live interactions, and ensure exceptional customer service. Below are the key features and their benefits tailored for supervisors:

Agent Details Overview: Supervisors can view detailed information about each assigned agent, including:

- Name and extension
- Line of Business (LOB) coverage
- Online/offline status

This at-a-glance visibility supports effective resource allocation and workload balancing.

Real-Time Performance Insights: The dashboard dynamically updates agent activity data, allowing supervisors to:

- Monitor online status and LOB coverage in real time
- Make quick decisions to address service demands and optimize team performance

Live Call Monitoring: Supervisors can access ongoing calls to:

- View real-time transcripts, checklists, and call steps
- View real-time sentiment, allowing them to identify which calls are going well and which need attention
- Ensure adherence to protocols
- Provide immediate guidance to agents during live interactions

Call History Access: Supervisors can review past interactions through:

- Detailed call transcripts and summary data. This enables the following:
    - Identification of performance trends
    - Context-specific coaching
    - Continuous improvement and enhanced customer satisfaction

These features empower supervisors to maintain full visibility into agent activities, ensure compliance with call handling standards, and drive superior customer experiences through the intuitive Associate Assist platform.

Access Associate Assist

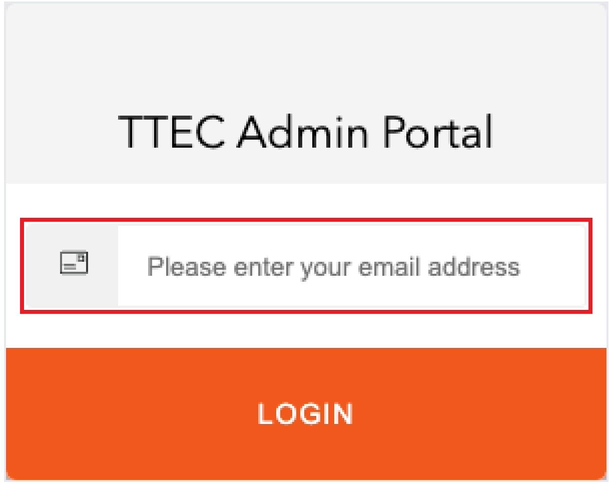
Log in to begin utilizing the powerful agent management features of Angel Associate Assist. This action opens the Supervisor Dashboard, where you can begin viewing details about your assigned agents and their live calls, transcripts, and more.

Log Into Associate Assist

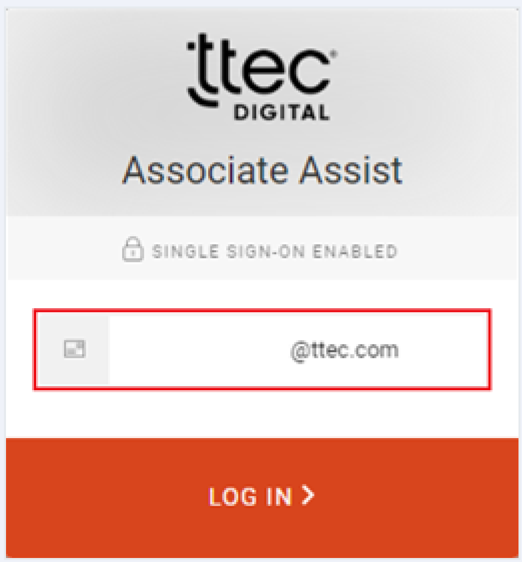
Log into Associate Assist using a direct link that is provided to you.

> **Notes:**
> - Please reach out to your manager to determine how you should log into the Associate Assist platform for your role.
> - Before you can log into Associate Assist, your manager must submit your user name to the Associate Assist product team. This ensures the security and integrity of the tool. Please contact your manager if you are unable to log in.

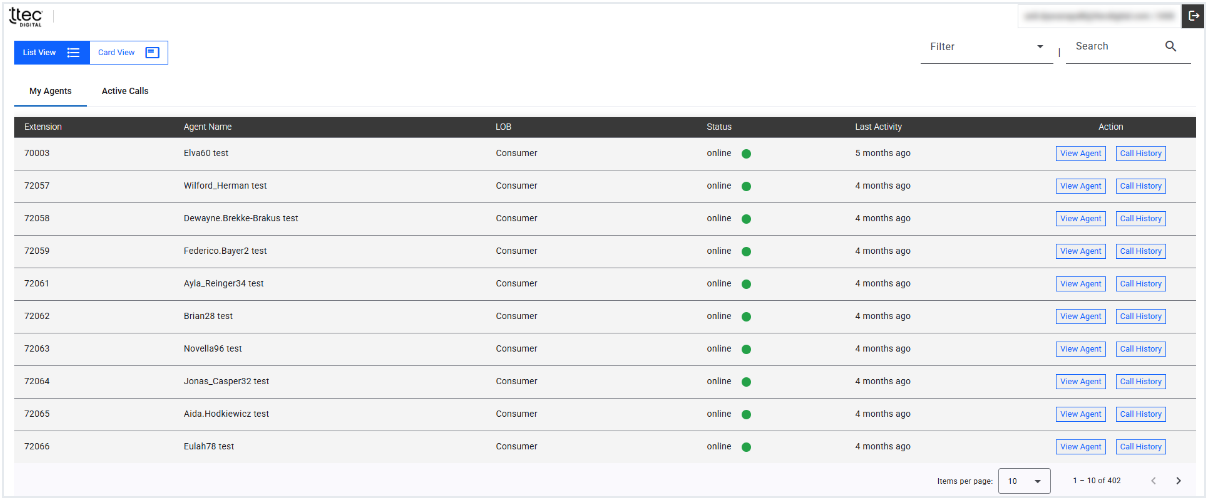
1. Enter your TTEC email address for the Single Sign-On (SSO).
2. Click **LOGIN**.



Note:
No password is needed, as SSO is used for access.



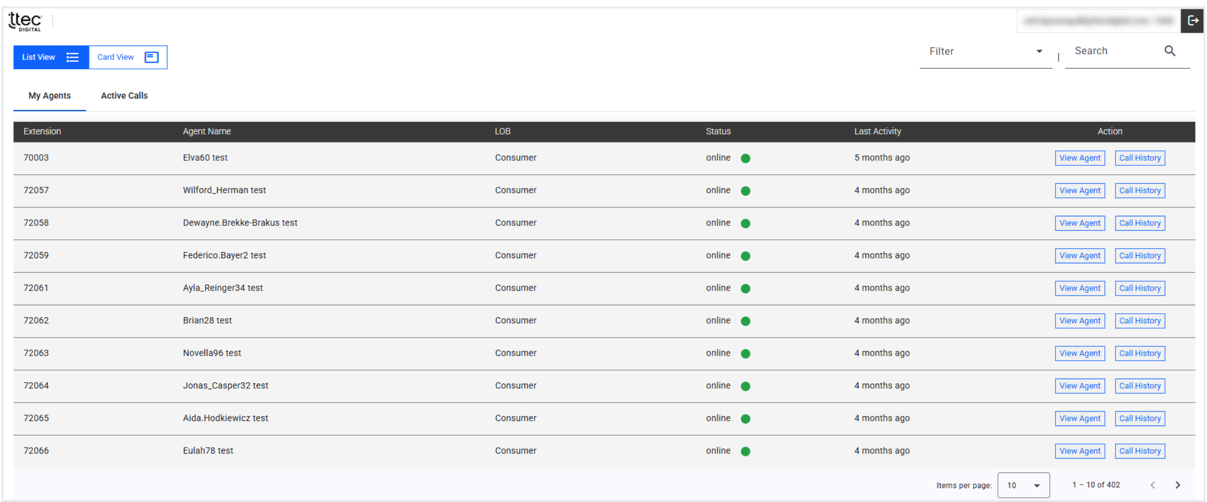
3. The Supervisor Dashboard now displays:



Extension	Agent Name	LOB	Status	Last Activity	Action
70003	Elva60 test	Consumer	online	5 months ago	View Agent Call History
72057	Wilford_Herman test	Consumer	online	4 months ago	View Agent Call History
72058	Dewayne.Brekke-Brakus test	Consumer	online	4 months ago	View Agent Call History
72059	Federico.Bayer2 test	Consumer	online	4 months ago	View Agent Call History
72061	Ayla_Reinger34 test	Consumer	online	4 months ago	View Agent Call History
72062	Brian28 test	Consumer	online	4 months ago	View Agent Call History
72063	Novella96 test	Consumer	online	4 months ago	View Agent Call History
72064	Jonas_Casper32 test	Consumer	online	4 months ago	View Agent Call History
72065	Aida.Hodkiewicz test	Consumer	online	4 months ago	View Agent Call History
72066	Eulah78 test	Consumer	online	4 months ago	View Agent Call History

Supervisor Dashboard Overview

The Associate Assist Supervisor user interface empowers you to manage your team efficiently through an intuitive Supervisor Dashboard. Use the top navigation bar to view your information and log out of Associate Assist, switch between List View and Card View to customize how agent and call data is displayed, and leverage the Filter drop-down and Search field on both the My Agents and Active Calls tabs to quickly locate specific agents, view their details, or monitor live calls, ensuring seamless oversight and enhanced team performance.



Associate Assist Supervisor User Interface

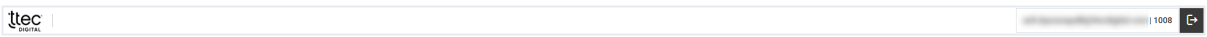
The Supervisor Dashboard contains the following key user interface elements:

- Navigation Bar
- Change View Buttons
- Filter Drop-down
- Search Field

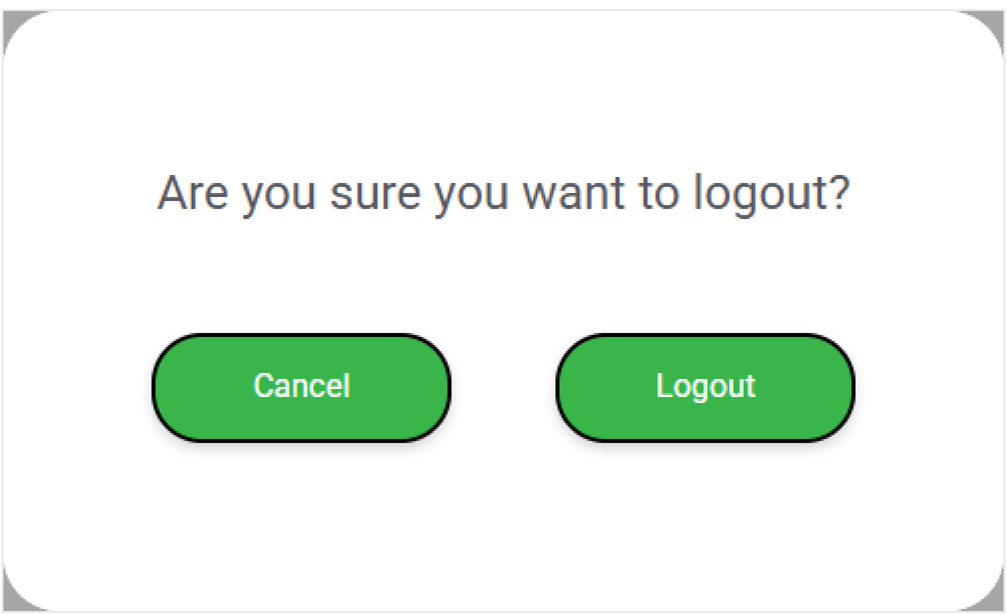
- My Agents Tab
- Active Calls Tab

Navigation Bar

The Navigation Bar, found at the top of the screen, displays your email address, extension, and a log out button.



- **Email Address:** Displays the email address of the supervisor logged into the Associate Assist tool.
- **Extension Number:** The number located to the right side of the email address is the extension number for your contact center platform.
- **Log Out ():** Opens a log out confirmation window that allows you to log out of Associate Assist.

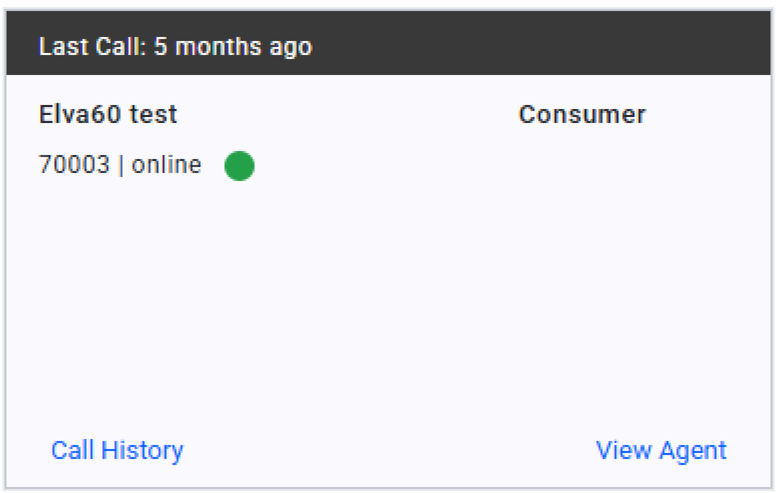


Change View

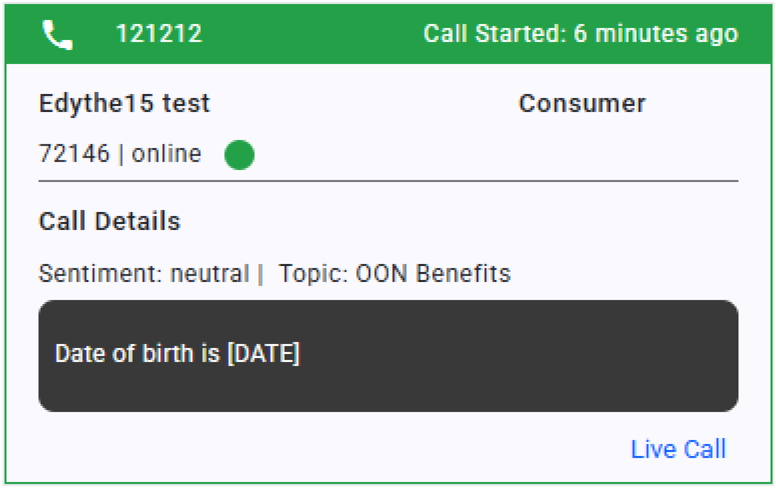
The **List View** and **Card View** buttons allow you to change how agent and call information is presented on-screen. Click a button to switch between card and list views for both agents and active calls.

Note:
The current selected view is highlighted in blue.

- **Card View:** This view provides a detailed snapshot of each agent and call, making it easier to see comprehensive information at a glance. It is ideal for quickly assessing the status and details of individual agents and calls.



Example Agent Card



Example Active Call Card

- **List View:** This view organizes agents and calls in a streamlined, vertical list, allowing you to see more entries at once. It is the best view for managing a larger number of agents and calls efficiently, providing a clear overview without needing to scroll through detailed cards.

Extension	Agent Name	LOB	Status	Last Activity	Action
70003	Elva60 test	Consumer	online	5 months ago	View Agent Call History
72057	Wilford_Herman test	Consumer	online	4 months ago	View Agent Call History

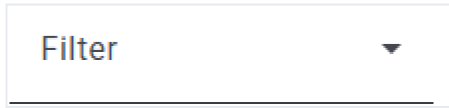
Example Agent List View

Source	Agent Name	LOB	Conversation	Last Topic	Call Duration	Sentiment	Action
121212	Edythe15 test	Consumer	I can't pay my bill on the internet. Can you help me?	Making Payment	4 minutes ago	neutral	Live Call
121212	Orpha_Crona test	Consumer	To determine if you qualify for a tax credit subsidy.	Estimate Income	2 minutes ago	neutral	Live Call

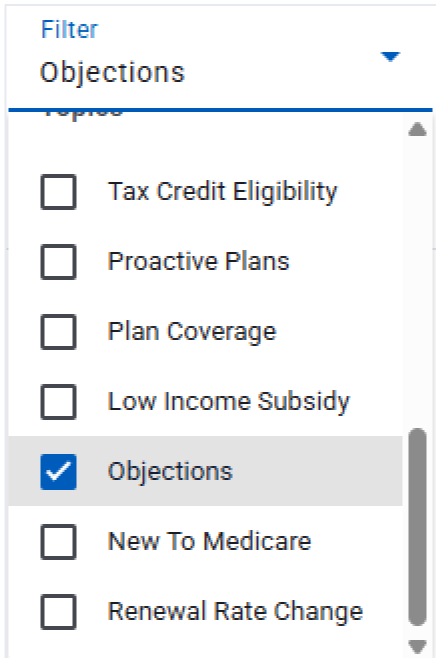
Example Active Calls List View

Filter Drop-down

The **Filter** drop-down menu displays a list of filter options that are tailored to your organization based on common customer interaction topics and lines of business (LOBs), ensuring relevant and efficient data management. This filter is available when viewing both the My Agents and Active Calls tabs.



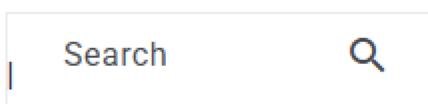
Filter



Filter Drop-down with Selection

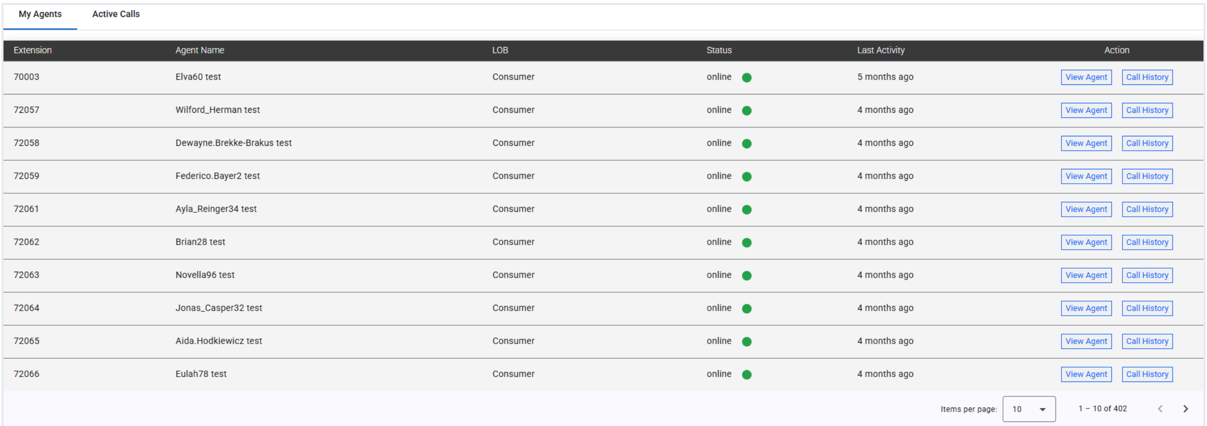
Search Field

Enter relevant text into the **Search** field to locate a specific agent or active call.



My Agents Tab

The My Agents tab provides supervisors with a real-time overview of their assigned agents, displaying key details such as extension, name, line of business (LOB), current status, and last activity. Supervisors can quickly assess agent availability and access tools like View Agent and Call History to support performance monitoring and coaching.



My Agents | Active Calls

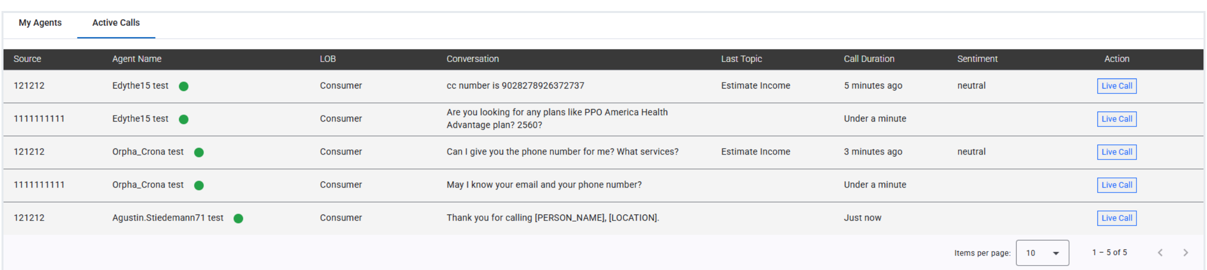
Extension	Agent Name	LOB	Status	Last Activity	Action
70003	Elva60 test	Consumer	online	5 months ago	View Agent Call History
72057	Wilford_Herman test	Consumer	online	4 months ago	View Agent Call History
72058	Dewayne.Brekke-Brakus test	Consumer	online	4 months ago	View Agent Call History
72059	Federico.Bayer2 test	Consumer	online	4 months ago	View Agent Call History
72061	Ayla_Reinger34 test	Consumer	online	4 months ago	View Agent Call History
72062	Brian28 test	Consumer	online	4 months ago	View Agent Call History
72063	Novella96 test	Consumer	online	4 months ago	View Agent Call History
72064	Jonas_Casper32 test	Consumer	online	4 months ago	View Agent Call History
72065	Aida.Hodkiewicz test	Consumer	online	4 months ago	View Agent Call History
72066	Eulah78 test	Consumer	online	4 months ago	View Agent Call History

Items per page: 10 1 – 10 of 402

To learn about using the features found within the My Agents tab, see "Monitor Agents" on page 12.

Active Calls Tab

The Active Calls tab provides supervisors with a live view of all ongoing calls across their assigned agents. It displays essential call details such as agent name, call duration, and line of business (LOB), enabling supervisors to monitor real-time activity, identify potential issues, and offer immediate support when needed.



My Agents | Active Calls

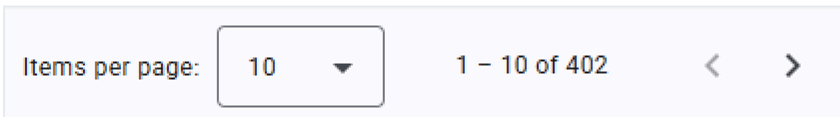
Source	Agent Name	LOB	Conversation	Last Topic	Call Duration	Sentiment	Action
121212	Edythe15 test	Consumer	cc number is 9028278926372737	Estimate Income	5 minutes ago	neutral	Live Call
1111111111	Edythe15 test	Consumer	Are you looking for any plans like PPO America Health Advantage plan? 2560?		Under a minute		Live Call
121212	Orpha_Crona test	Consumer	Can I give you the phone number for me? What services?	Estimate Income	3 minutes ago	neutral	Live Call
1111111111	Orpha_Crona test	Consumer	May I know your email and your phone number?		Under a minute		Live Call
121212	Agustin.Stiedemann71 test	Consumer	Thank you for calling [PERSON_NAME], [LOCATION].		Just now		Live Call

Items per page: 10 1 – 5 of 5

To learn about using the features found within the Active Calls tab, see "Monitor Active Calls" on page 15.

Pagination Controls

Pagination Controls are available on both the My Agents and Active Calls tabs and allow supervisors to navigate through multiple pages of data within the dashboard. Located at the bottom of each tab, these controls enable users to change the number of items displayed on the page and move forward or backward between pages, making it easy to browse large sets of agent or call records efficiently.



Using Associate Assist

When accessing Associate Assist as a supervisor, your experience is centered around two key tabs:

- My Agents
- Active Calls

My Agents Tab

The My Agents tab gives you a real-time overview of your team's activity. You can see which agents are currently active, their current status, and whether they're engaged in a call. This view helps you quickly assess workload distribution and identify who may need support.

Learn more about monitoring agents: "Monitor Agents" on the next page

Active Calls Tab

The Active Calls tab allows you to monitor live conversations between agents and customers. You can view the full interaction as it happens, including both sides of the conversation, but you cannot interact with or influence the call.

Learn more about monitoring active calls: "Monitor Active Calls" on page 15

Monitor Agents

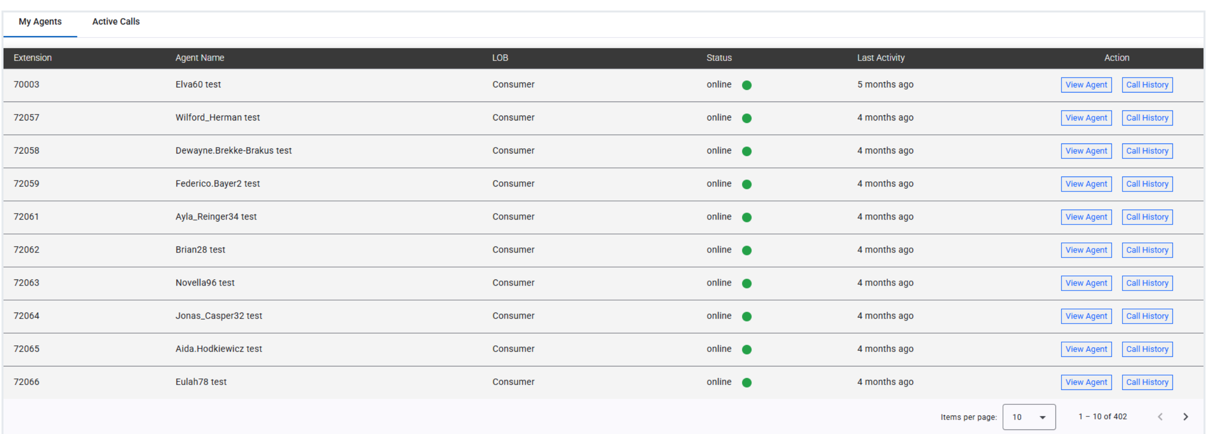
The Supervisor Dashboard in Associate Assist empowers supervisors with the tools and visibility needed to effectively oversee their assigned agents.

My Agents Tab Overview

To manage and view your assigned agents, access the My Agents tab. This tab provides a real-time snapshot of each agent's status, line of business (LOB), and recent activity, along with quick-access tools like View Agent and Call History to support informed supervision and timely decision-making.

MY AGENTS (LIST VIEW)

When viewing the My Agents tab with List View selected, agent details are organized into clearly labeled columns. This layout allows supervisors to quickly scan and compare key information—such as agent name, extension, line of business (LOB), status, and last activity—across multiple agents at once.


My Agents Active Calls

Extension	Agent Name	LOB	Status	Last Activity	Action
70003	Elva60 test	Consumer	online	5 months ago	View Agent Call History
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72059	Federico.Bayer2 test	Consumer	online	4 months ago	View Agent Call History
72061	Ayla_Reinger34 test	Consumer	online	4 months ago	View Agent Call History
72062	Brian28 test	Consumer	online	4 months ago	View Agent Call History
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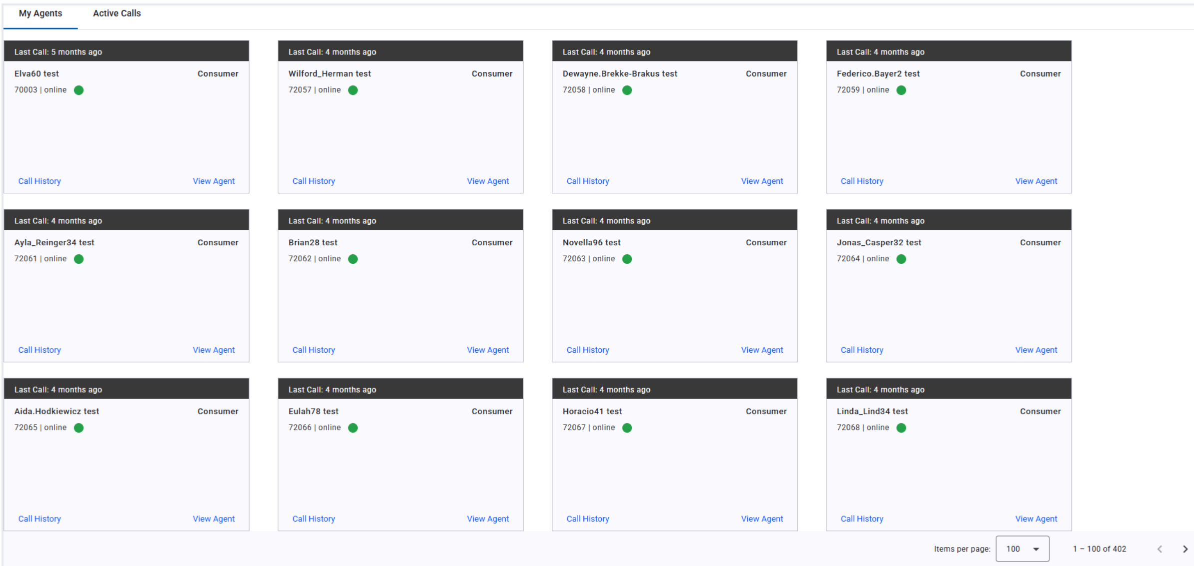
72064	Jonas_Casper32 test	Consumer	online	4 months ago	View Agent Call History
72065	Aida.Hodkiewicz test	Consumer	online	4 months ago	View Agent Call History
72066	Eulah78 test	Consumer	online	4 months ago	View Agent Call History

Items per page: 10 1 – 10 of 402

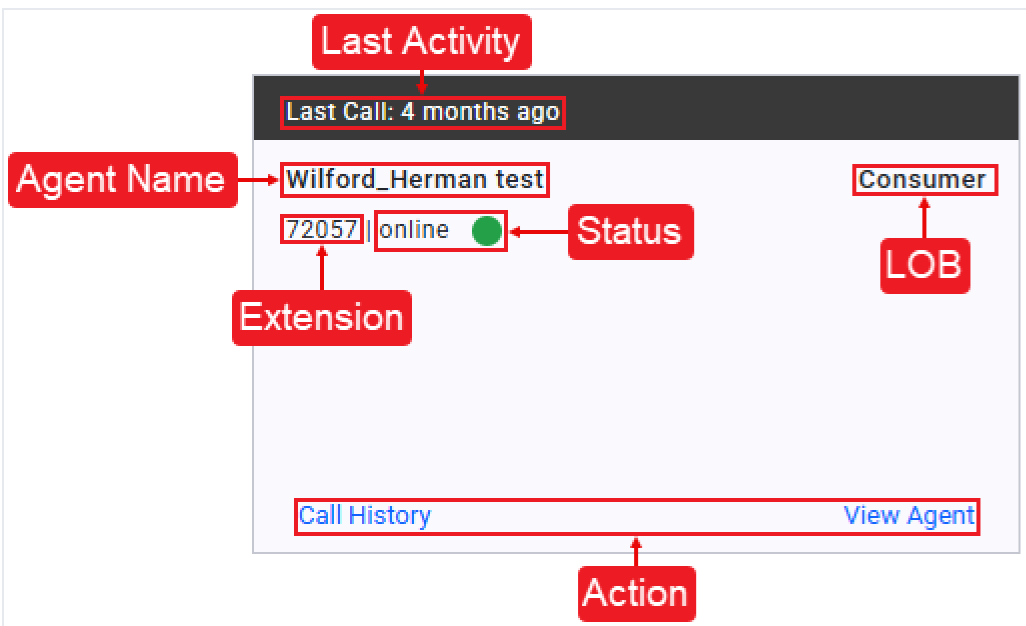
My Agents Tab (List View)

MY AGENTS (CARD VIEW)

When viewing the My Agents tab with Card View selected, each agent's details are displayed within individual cards. This layout highlights key information, such as name, extension, LOB, status, and last activity, in a visually organized format, making it easier to focus on one agent at a time and take quick actions when needed.



My Agents Tab (Card View)



Agent Details

Whether you are viewing the My Agents tab in List View or Card View, you can easily access the following same key agent details:

- **Extension** – Displays the unique phone or system number assigned to the agent, used for internal communication and call routing.
- **Agent Name** – Displays the name of the agent.
- **LOB** – Indicates the specific service area or department the agent is assigned to, such as customer support, billing, or technical assistance.
- **Status** – Shows the agent's current availability (e.g., online, offline, on a call).
- **Last Activity** – Displays the most recent time the agent was active in the system, helping supervisors track engagement and availability.
- **Action** – Provides quick-access to **View Agent** or **Call History**, allowing supervisors to take immediate action or review agent performance. See the "View Agent" below and "Call History" below sections for additional details.

View Agent

Updates/changes are in the works for this feature. This section will be included when those updates are ready.

Call History

Updates/changes are in the works for this feature. This section will be included when those updates are ready.

Monitor Active Calls

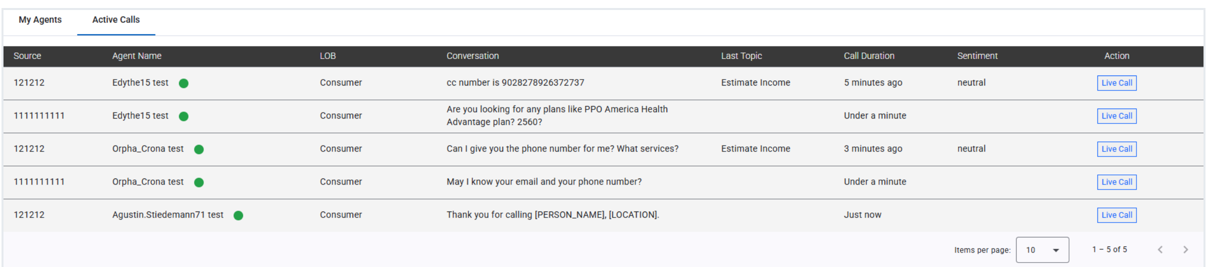
The Active Calls tab gives supervisors a real-time overview of ongoing calls, showing key details, such as agent name, call duration, sentiment, and line of business (LOB) to support effective monitoring and timely assistance.

Active Calls Tab Overview

Monitor live interactions by accessing the Active Calls tab. This tab displays all ongoing calls for your assigned agents.

ACTIVE CALLS (LIST VIEW)

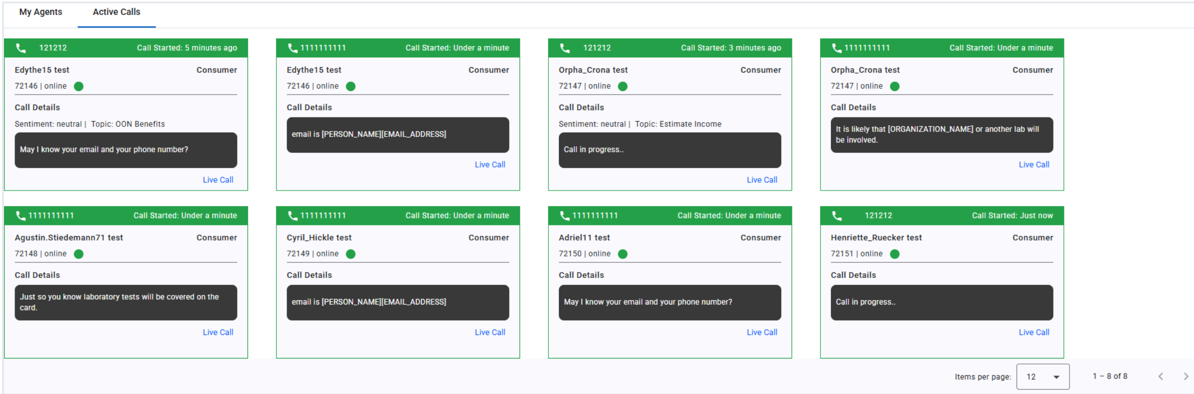
When using List View for the Active Calls tab, ongoing calls are displayed in a structured, column-based format. This layout presents essential call information, allowing supervisors to efficiently monitor multiple live interactions and identify where support may be needed.



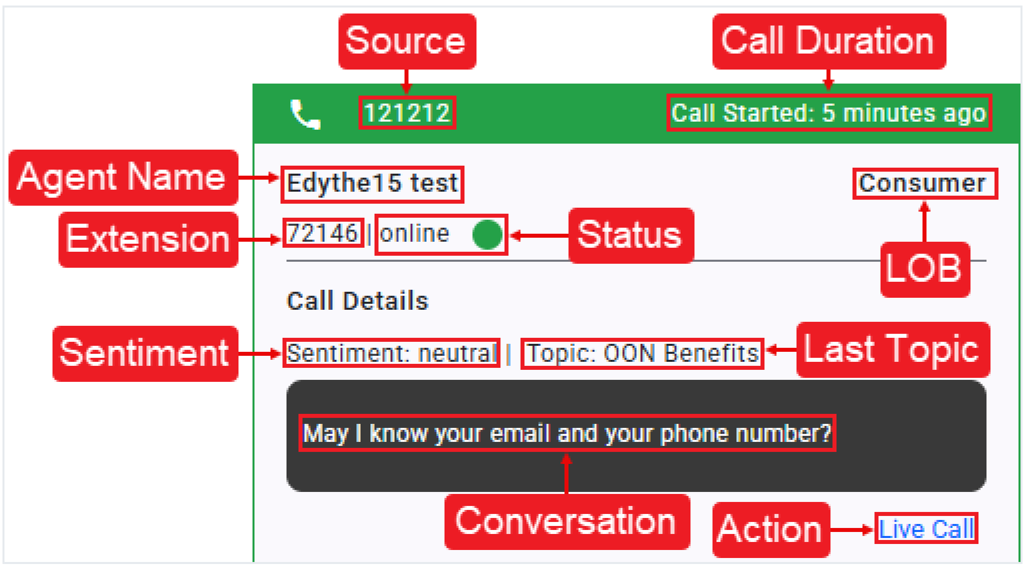
Active Calls Tab (List View)

ACTIVE CALLS (CARD VIEW)

When viewing the Active Calls tab in Card View, each ongoing call is displayed as an individual card containing key call details. This layout provides a visual snapshot of each individual interaction, making it easy to focus on specific calls and quickly assess where attention may be needed.



Active Calls Tab (Card View)



Active Call Details

Regardless of the selected view, the Active Calls tab displays the following consistent call information, allowing supervisors to monitor key details across all ongoing interactions:

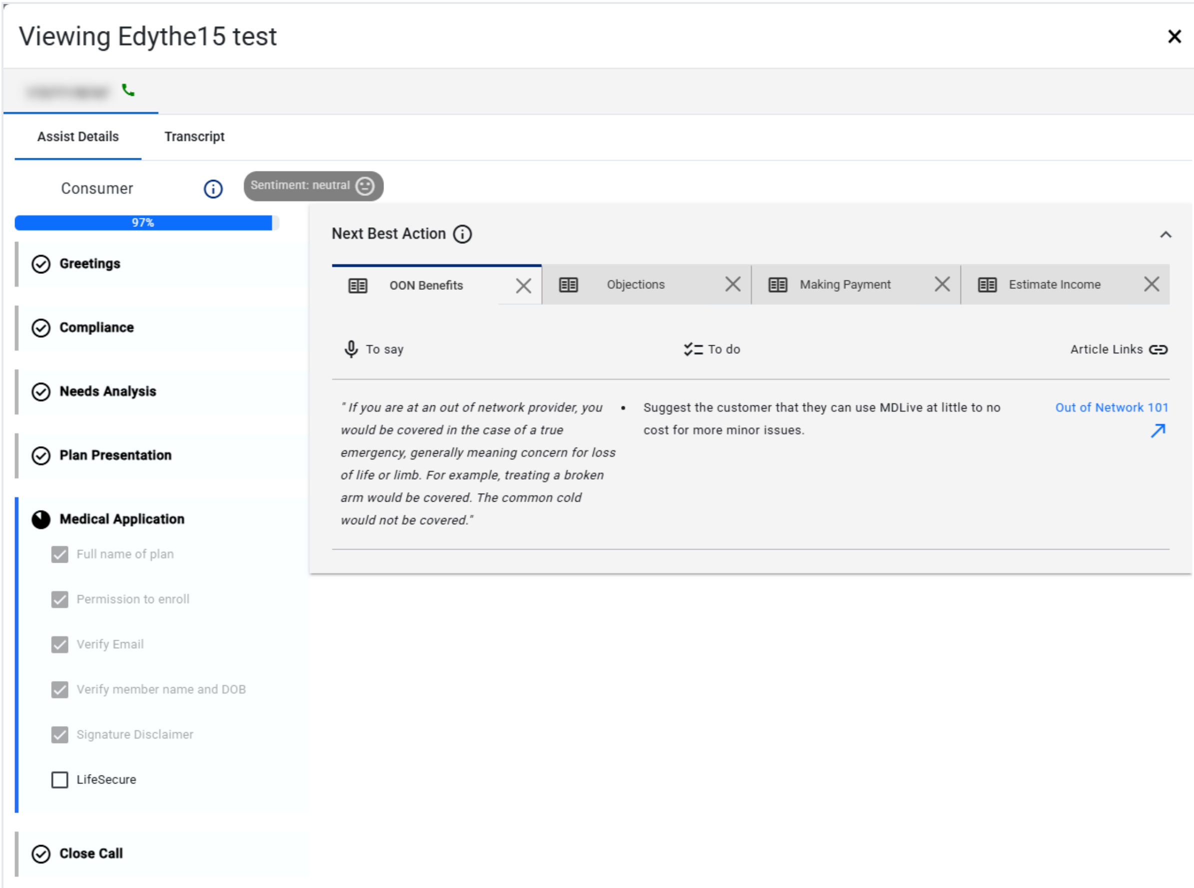
- **Source** – Indicates where the call originated, such as the customer's phone number.
- **Agent Name** – Displays the name of the agent currently handling the call.

- **LOB** – Identifies the business area or department associated with the call, helping categorize the interaction by function or service type.
- **Conversation** – Provides a brief preview of the most recent utterance from the ongoing interaction.
- **Last Topic** – Shows the most recent topic or issue discussed during the call, based on AI analysis.
- **Call Duration** – Displays the elapsed time of the current call, updated in real-time.
- **Sentiment** – Reflects the emotional tone of the conversation, typically categorized as positive, neutral, or negative.
- **Action** – Provides access to **Live Call**, allowing supervisors to monitor. See the "Live Call" below section for additional details.

Live Call

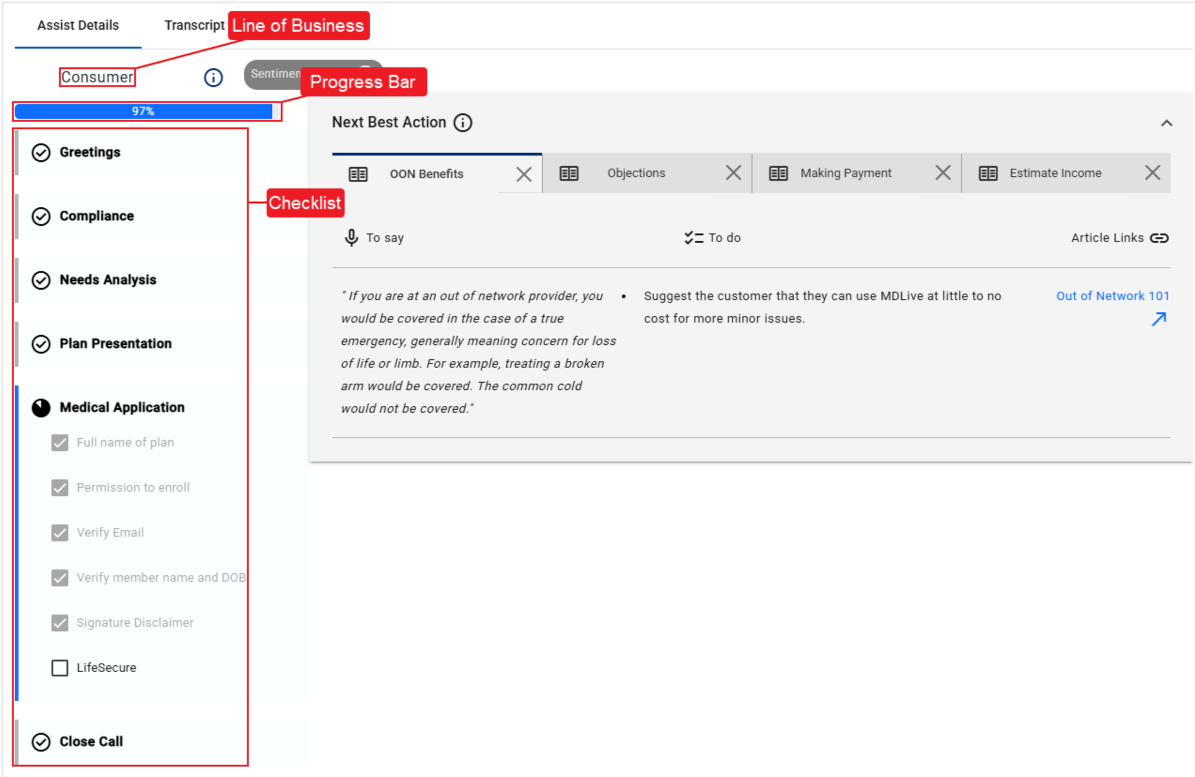
Clicking **Live Call** opens a dialog where you can view and monitor an active interaction between an agent and a customer in real-time. This feature enables passive listening without notifying either party, providing insight into the conversation's context, tone, and progress through the Assist Details tab. You can also follow the live conversation transcript in the Transcript tab within the same dialog.

> **Note:**
> Supervisors can monitor live calls in real-time but cannot interact with the conversation.



Assist Details Tab

The checklist interface feature of Associate Assist is found within the Assist Details tab. It displays the agent's current progress within the call using visual cues, such as a progress bar and icons, to track their tasks.

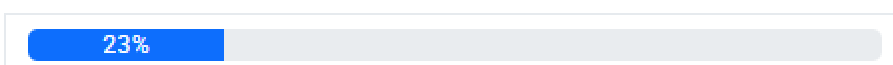


LINE OF BUSINESS

Displays the Line of Business (LOB) that relates to the call. A LOB refers to a specific service category or client focus handled by the contact center.

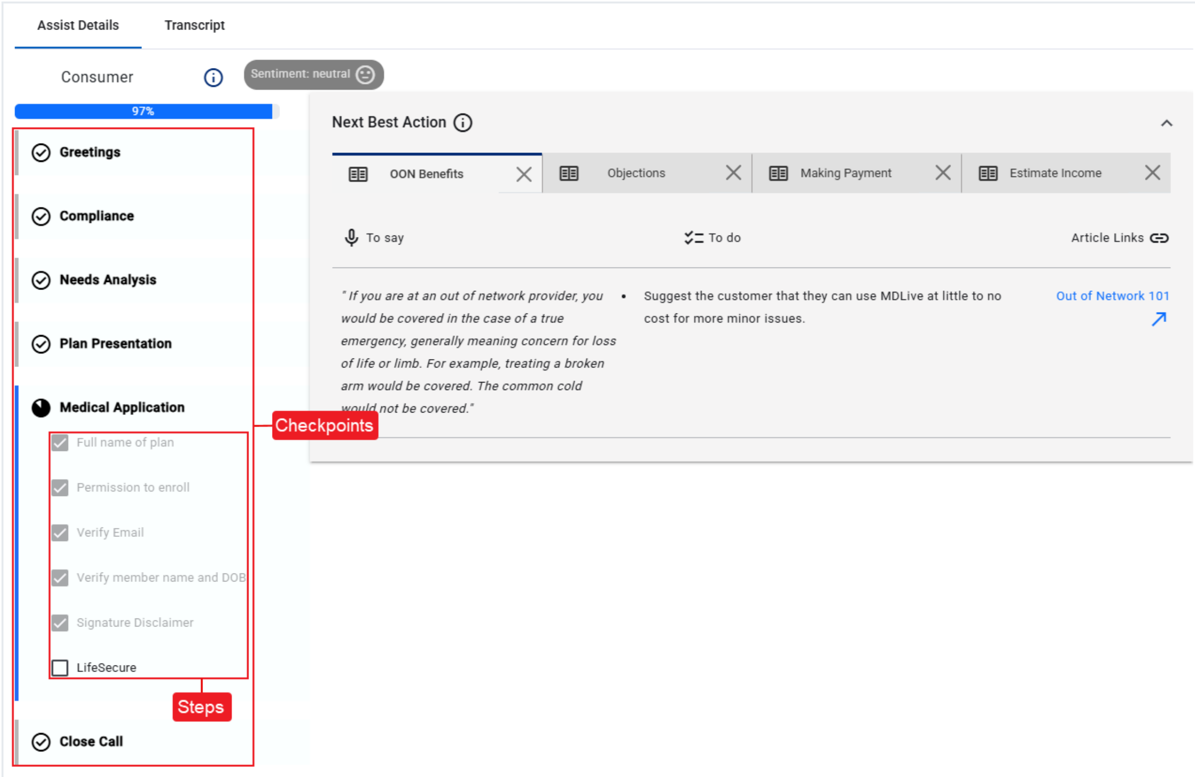
PROGRESS BAR

The progress bar reflects the agent's progress as checklists and steps are completed throughout their session.



CHECKLIST

The Checklist is composed of multiple **Checkpoints**, each containing a series of **Steps**. Status icons dynamically update to reflect real-time progress throughout the current call, providing clear visual indicators of completion and next actions:



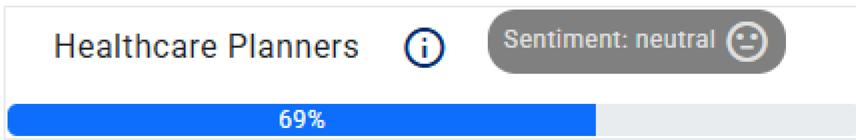
- **Checkpoint In Progress** – Displays the agent's current checkpoint in progress, represented by a pie icon that gradually fills as each step is completed.
- **Checkpoint Pending** – Shows a checkpoint the agent has not yet started, with no steps completed.
- **Checkpoint Complete** – Displays beside completed checkpoints.
- **Incomplete Step** – Displays beside each step that is not yet complete within a checkpoint.

> **Note:**
> If Associate Assist fails to automatically check a step, you can mark it manually.

- **Complete Step** – Displays beside any step automatically marked as completed by the AI engine.
- **Agent Completed Step** – Displays beside any step manually marked as completed by the agent.

CALLER SENTIMENT

During a call, **Sentiment** reflects the AI's perception of the conversation:

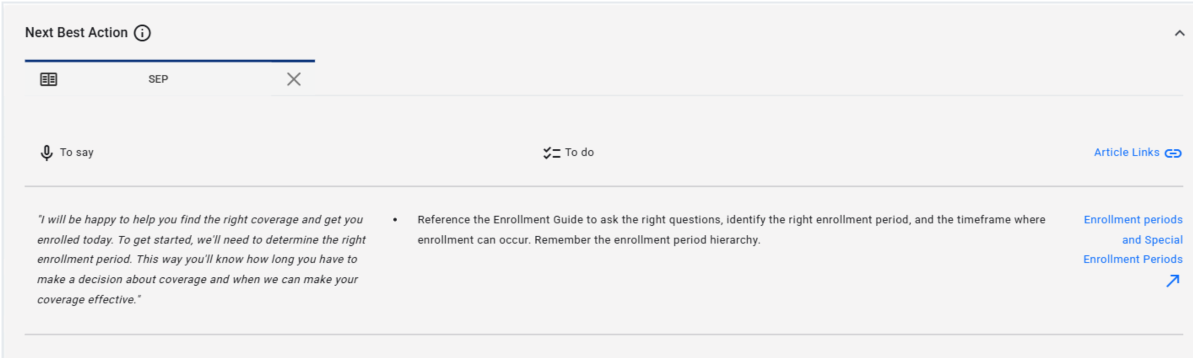


- **Positive** – Indicates a friendly or satisfied tone, suggesting the caller is happy with the interaction.
- **Neutral** – Reflects a neutral or balanced tone, with no strong positive or negative emotions detected.
- **Negative** – Signals a frustrated or upset tone, alerting you to potential dissatisfaction or issues.

> **Note:**
> A negative sentiment can reflect concerns such as pricing, not just frustration or anger. Agents can discuss options to help ease their concern and improve their experience.

NEXT BEST ACTION

The Next Best Action feature provides the agent real-time call guidance with a suggested script to follow, a task to complete, and relevant article links. For example, it might offer a script to address customer concerns, a task to reference a product guide, and a link to supporting resources.

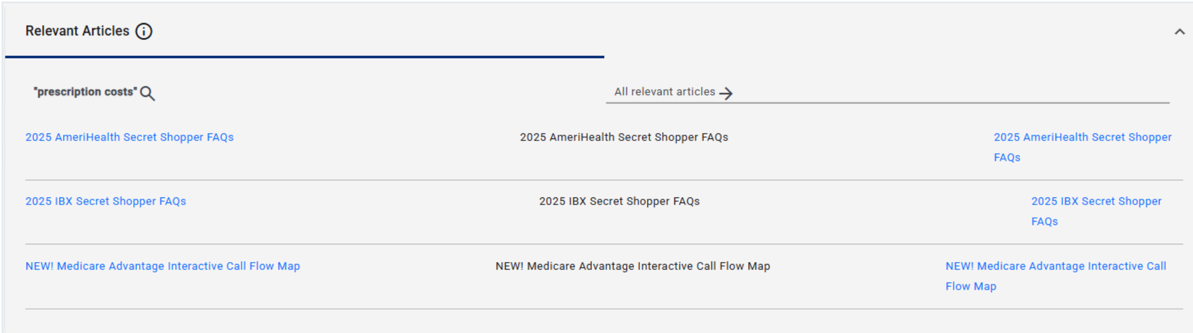


- **To say** – A generated script for the agent to read or follow during customer interactions.
- **To do** – A generated action for the agent to perform for effective customer assistance.
- **Article Links** – Links to resources providing quick access to action-related information.

RELEVANT ARTICLES - AGENT SEARCH

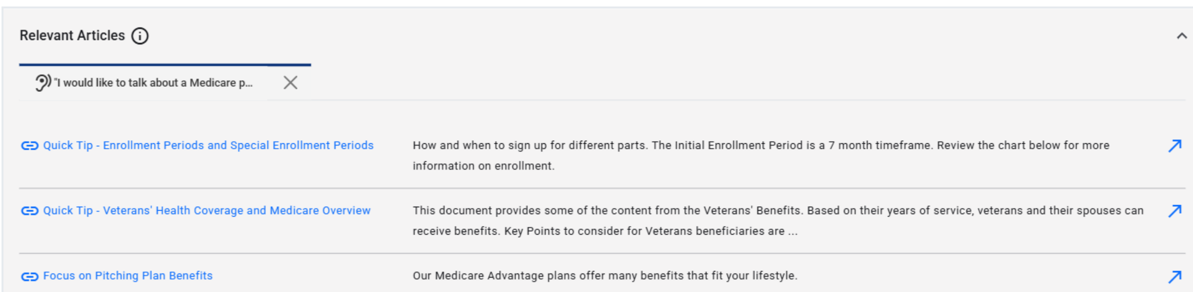
During a call, agents can use the search feature to quickly find helpful resources for their conversations. When they perform a search, the Relevant Articles panel displays. This panel can contain the following types of resources based on the agent's search:

- Articles
- FAQs
- Guides



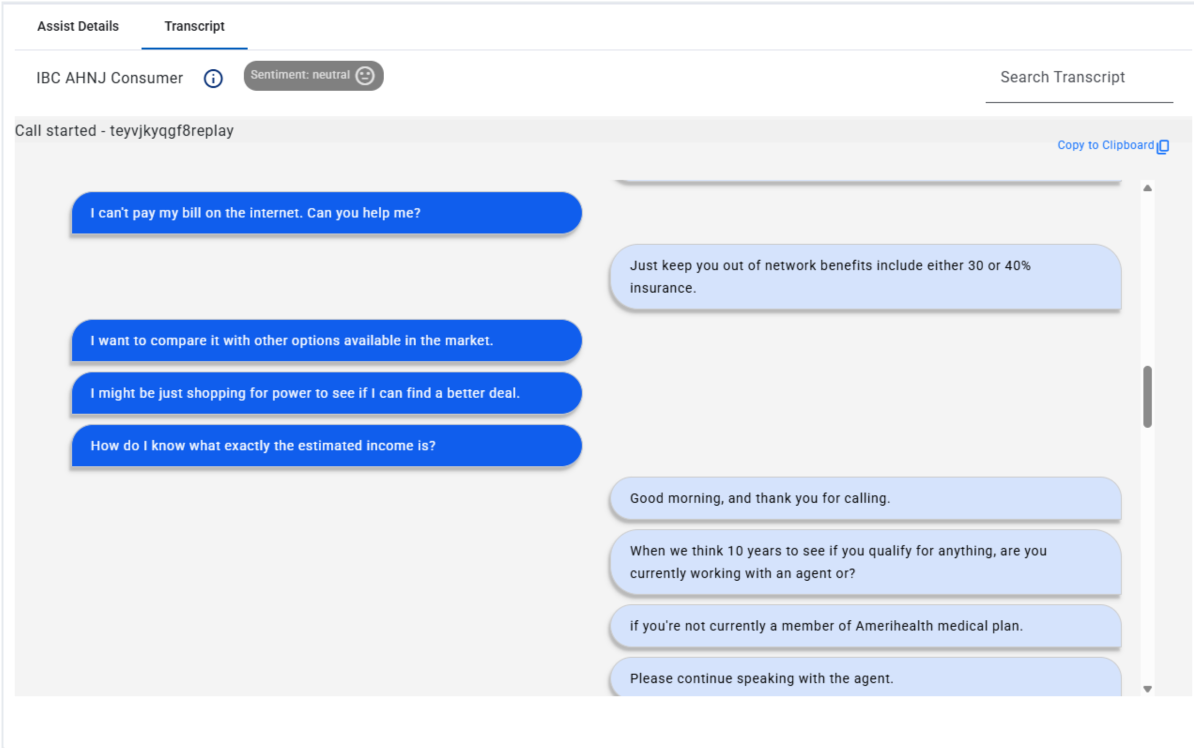
RELEVANT ARTICLES - AI ENGINE SEARCH

The AI engine can also automatically display resources in the Relevant Articles panel based on the agent's conversation, marked by a **Heard** ( ) icon. For example, if a customer discusses a specific need, the AI might suggest articles, such as FAQs or guides, to help the agent respond effectively.



Transcript Tab

When monitoring an agent's Live Call, the Transcript tab allows you access and view the real-time transcript during the call. It identifies both the customer and agent dialogue with timestamps, sentiment analysis, and a search feature.



- **Search Transcript** – Enter text to locate specific words or sections within the call transcript.
- **Call started** – Shows the call's phone number, date, time, and the assigned session ID.
- **Copy to Clipboard** – Copy the transcript to paste into notes or systems for documentation and sharing.
- **Customer** – Transcribed customer dialogue, displayed in blue chat bubbles.
- **Agent** – Transcribed agent dialogue, displayed in light blue chat bubbles.
- **Call ended** – Shows the date and time stamp for when the call ends.

Note:
PII (Personally Identifiable Information) is redacted from call transcripts in real-time when requested by the customer. All transcripts are stored with PII redacted to maintain privacy and ensure compliance.