



AI Assist

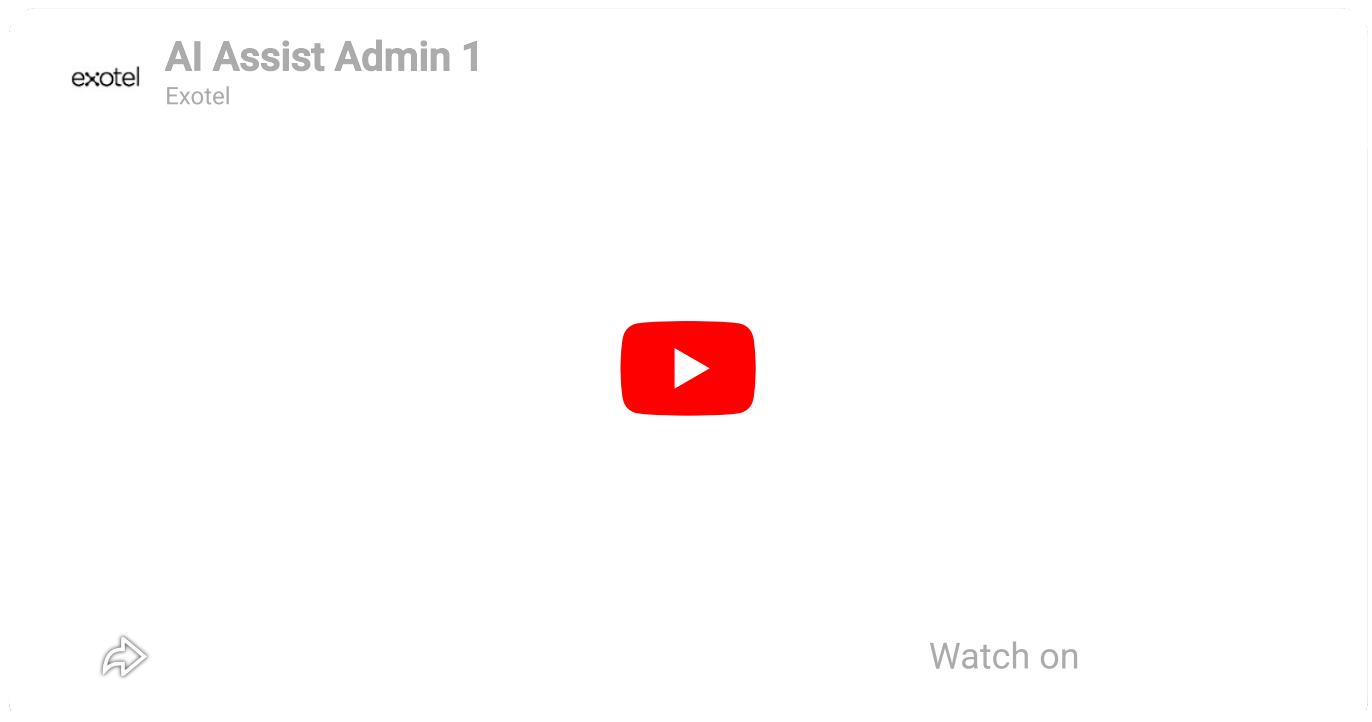
1. [Exotel AI Assist : Userguide](#)
2. [Edit, Manage, and Re-Publish an Assistant](#)
3. [Deploy Configuration App in Exotel Contact Centre](#)
4. [Deploy Assistant in Exotel Contact Center](#)
5. [AI Assist in Exotel Platform](#)
6. [Configure the Smart Reply Language](#)
7. [Enable Auto Disposition Recommendation and AI Disposition Notes in AI Assist](#)
8. [Enabling Inbound Call Streaming for AI Assist on Ameyo 6.0](#)
9. [AI Assist Configuration Options](#)
10. [Interaction History](#)
11. [Collect Feedback on AI Smart Replies](#)

1. Exotel AI Assist : Userguide

Make Your AI Assist Assistant Available to Agents During Live Calls and Chats

This guide helps you create, configure, and activate a **AI Assist Assistant** so that agents can use it during **live voice calls and chat interactions** in the Contact Center.

Follow the steps in order. Each step builds on the previous one.



Before You Start

Make sure the following are already set up in your Contact Center account:

- You have **Admin access** to the Contact Center.
- At least one **active campaign** exists.
- Agents are already **assigned to campaigns**.
- Voice or Chat is **enabled and working**, depending on your use case.
- You can place a **real test call** or initiate a **real chat**.

It is recommended to make changes during non-working hours otherwise it might impact the business

User Management (100+)

<input type="checkbox"/>	User ID	User Name	User Role	Actions
<input type="checkbox"/>	SGE1	SGE1	Executive	Edit
<input type="checkbox"/>	SGE2	SGE2	Executive	Edit
<input type="checkbox"/>	SGS1	SGS1	Supervisor	Edit
<input type="checkbox"/>	admin1_omni	admin1_omni	Administrator	Edit
<input type="checkbox"/>	admin2_omni	admin2_omni	Administrator	Edit
<input type="checkbox"/>	admin3_omni	admin3_omni	Administrator	Edit
<input type="checkbox"/>	admin5_omni	admin5_omni	Administrator	Edit
<input type="checkbox"/>	admin6_omni	admin6_omni	Administrator	Edit
<input type="checkbox"/>	admin7_omni	admin7_omni	Administrator	Edit
<input type="checkbox"/>	agasti_agent	agasti_agent	Executive	Edit

Rows per page: 10 | 1-10 of 100+ >

Important :

If any of these are missing, complete them first.

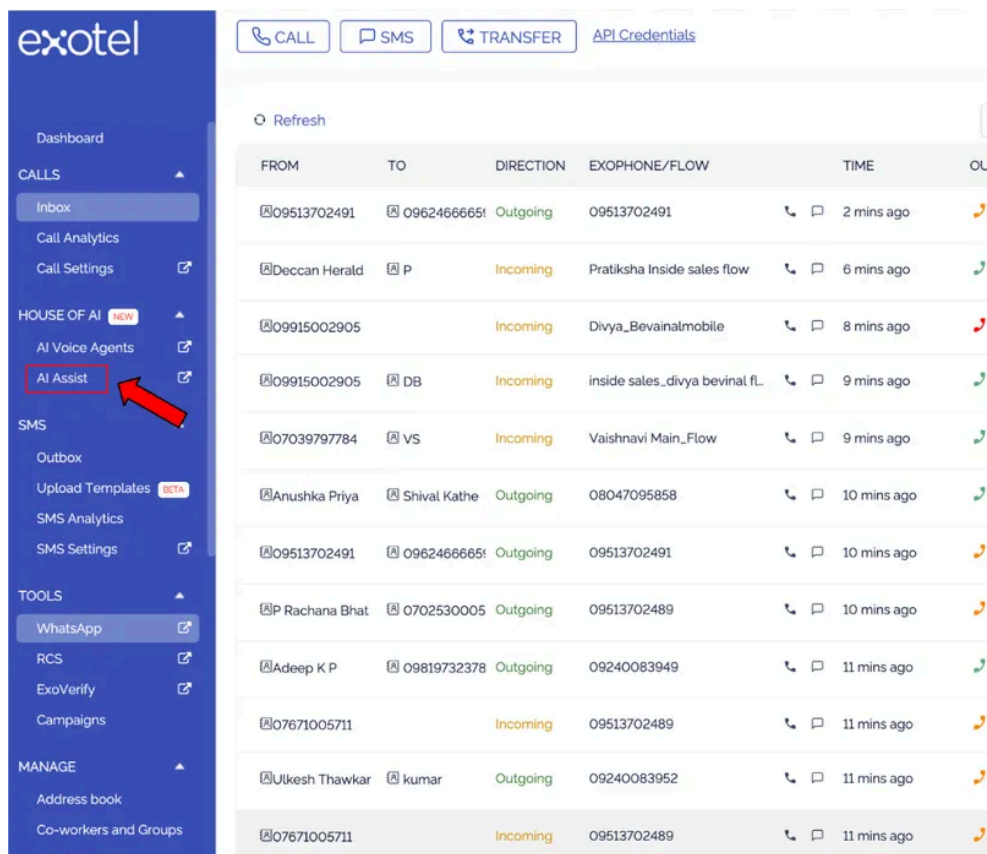
AI Assist Assistant will not activate unless it is mapped to an active campaign and triggered by a real interaction.

Step 1: Open the AI Assist Assistant Portal

What to do

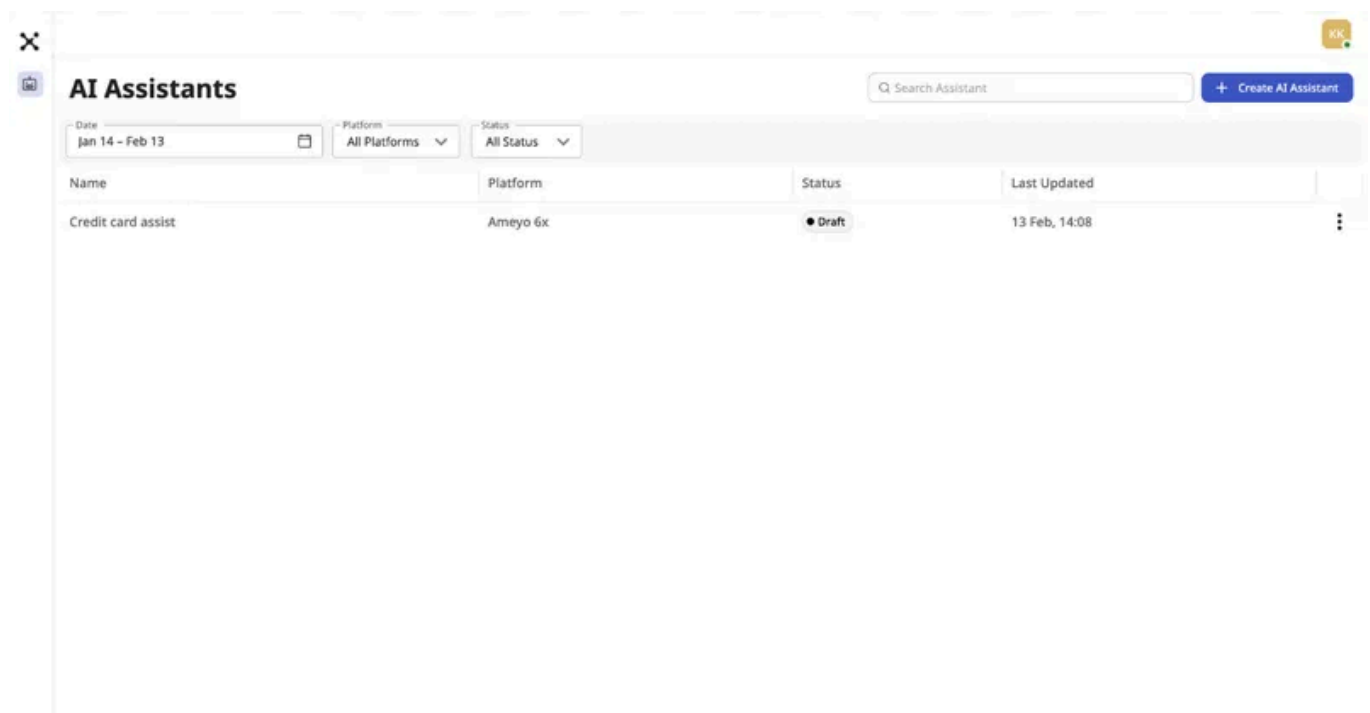
1. Log in to the `my.in.exotel.com`
2. Click on AI Assist tab in the left navigation
3. It will redirect to <https://ai-assist.in.exotel.com/> platform to create AI Assist Assistant.

Note: You must log in to `my.in.exotel.com` before to access <https://ai-assist.in.exotel.com/>.



What happens after this step

You see AI Assist Portal where AI Assist Assistant settings are set and managed.



Step 2: Create a New AI Assist Assistant

What to do

1. Click **Create Assistant**.

+ Create Assistant

2. Enter a clear name (example: *Voice & Chat Assist – Card Support*).
3. Define the purpose and behavior of this assistant to govern ai assistance

Some examples :

1. Assist agents across all customer support calls by surfacing relevant KBs, SOPs, and compliant guidance.

2. Assist agents during credit card upsell calls by surfacing relevant offers, eligibility rules, objection handling scripts, and compliance guidelines.

3. Support loan collections calls with compliant scripts, negotiation guidance, and disposition suggestions.

4. Click Next to proceed.

Create Assistant

Define the purpose and behavior of this Assistant's configuration. Deployment and feature-level controls are configured later.

Assistant Name *

Used to identify this assistant during campaign mapping, reporting, and audits

Description *

Define the purpose and behaviour of this assistant to govern AI assistance

e.g. 1 - Assist assistants across all customer support calls by surfacing relevant KBs, SOPs, and compliant guidance

e.g. 2 - Assist assistants during credit card upsell calls by surfacing relevant offers, eligibility rules, objection handling scripts, and compliance guidelines

e.g. 3 - Support loan collections calls with compliant scripts, negotiation guidance, and disposition suggestions

Enhance Prompt

Next

Step 3: Upload Reference Documents

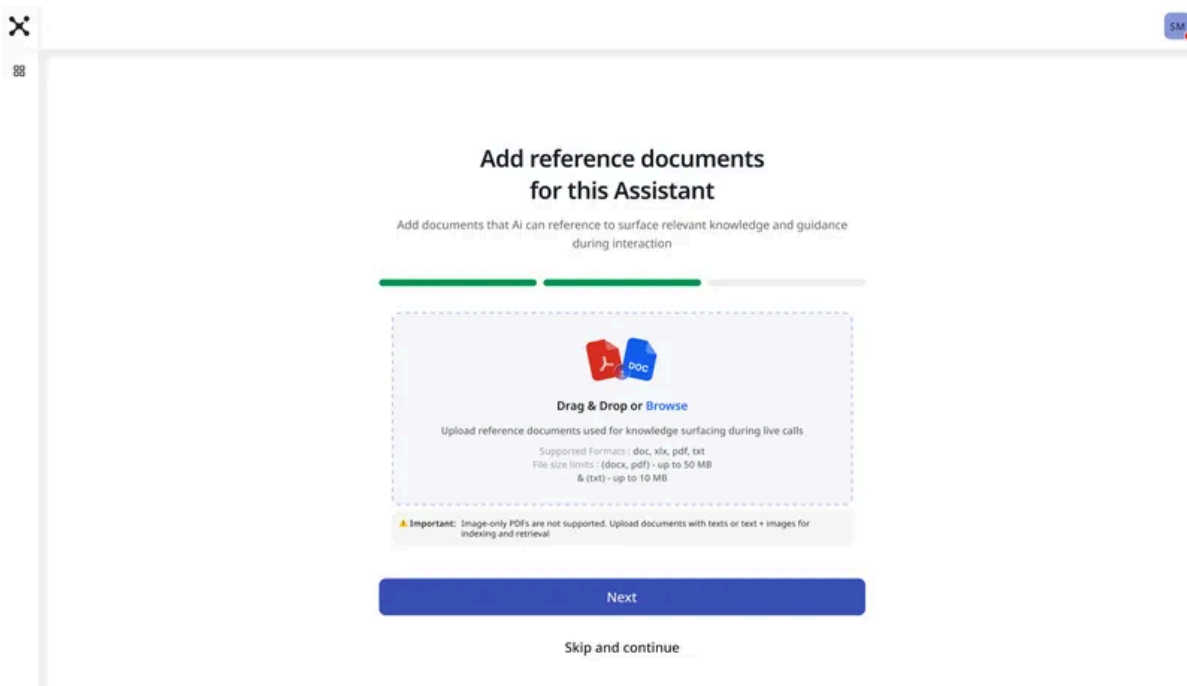
What this step is for

In this step, you upload reference documents that the **AI Assist Assistant** uses to surface **Smart Replies** during live interactions.

The quality and relevance of these documents directly determine **how the assistant behaves and what it suggests to agents**.

What to do

1. On the **Add reference documents for this Assistant** screen, upload documents that are **relevant to the assistant's intended behavior**:
 - Policies, SOPs, scripts, or FAQs that the assistant should follow
 - Content aligned to the use case (for example: card blocking, refunds, delivery issues)
2. Upload files by:
 - Dragging and dropping them into the upload area, **or**
 - Clicking **Browse** to select files from your system
3. Click **Next** to continue.



Important guidance on what to upload

For example:

- If the assistant is meant for **Card Support**, upload card-related SOPs and FAQs.

- If it is for **Delivery or Logistics**, upload delivery workflows and escalation guides.

Supported file formats and limits

- **Supported formats:** .doc, .xls, .pdf, .txt
- **File size limits:**
 - .doc, .pdf: up to **50 MB**
 - .txt: up to **10 MB**

Important :

Image-only PDFs are not supported. Upload documents that contain readable text (or text + images) so the content can be indexed and used for suggestions.

What happens after this step

- The uploaded documents are indexed.
- During live **voice calls or chat interactions**, AI Assist Assistant uses this content to:
 - Surface Smart Replies
 - Guide agents based on the defined behavior of the assistant

Optional: Skip for now

- You can click **Skip and continue** if documents are not ready.
- KB documents can be added or updated later by editing the AI Assist Assistant configuration.

What to avoid

- Do not upload unrelated or generic documents.
- Do not mix multiple use cases in a single assistant.
- Do not upload outdated or draft content.
- Do not upload scanned or image-only files.

Step 4: Configure Assistant

4A. Review Basic Details and Select Channel

What to do

1. In Basic Configurations, Select one or both channels:

- **Voice**

Note: AI Assist behavior adapts based on the selected channel.

2. Review other basic details or Upload/Edit uploaded reference documents.

Lead Qualification Assistant
Complete the steps below to configure and deploy the assistant

1 Basic details
Define and identify this assistant

2 Configuration
Connect platforms and configure assistant behavior

3 Deploy and Publish
Deploy the assistant in the integrated platform

Basic details
Enter the core information to define and identify your assistant

Assistant name *
Used to identify this configuration in campaign mapping, reporting, and audits

Assistant Name *
Fraud Support Assistant

Interaction channels *
Select the interaction types where assistant will be available

Chat
Agent is available during chat-based interactions.

Voice
Assistant assist is available during voice calls.

Description *
Define the purpose and behavior of this assistant to govern AI assistance

Description *

e.g. 1 - Assist assistants across all customer support calls by surfacing relevant KBs, SOPs, and compliant guidance.
e.g. 2 - Assist assistants during credit card upsell calls by surfacing relevant offers, eligibility rules, objection handling scripts, and compliance guidelines.
e.g. 3 - Support loan collections calls with compliant scripts, negotiation guidance, and disposition suggestions

Add documents
Add documents your assistant can refer to and learn from to give better, more accurate responses

Drag & Drop or Browse
Upload reference documents used for knowledge surfacing during live calls

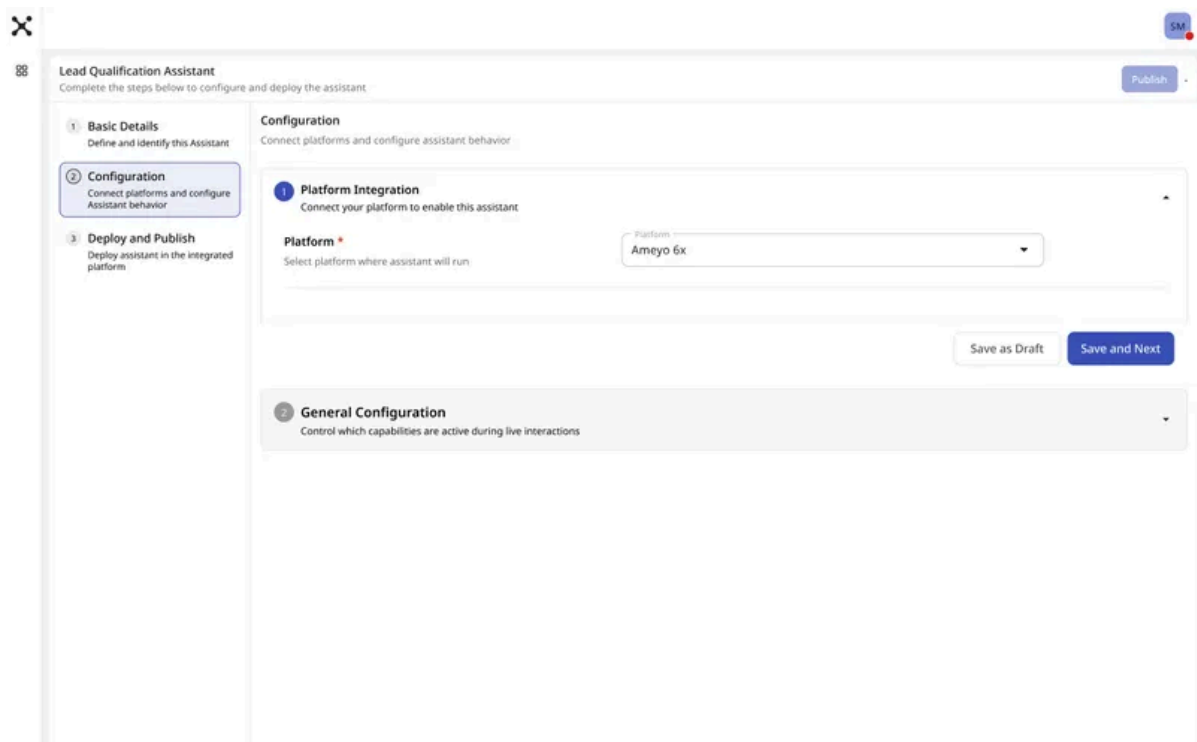
Supported Formats : doc, xlsx, pdf, txt
File size limits : (docx, pdf) - up to 50 MB & (txt) - up to 10 MB

Save Draft Next

4B. Set Configurations

What to do

1. Platform Integration - Select platform to run Assistant and Click on Save and Next.



2. General Configuration -

1. Enable/Disable Live transcript for Voice Interactions

■ What happens after this step

- Agents see live captions **only during voice calls**.

■ **Note:** Transcript display applies **only** when **Voice** is the active channel.

2. Enable/Disable Smart replies

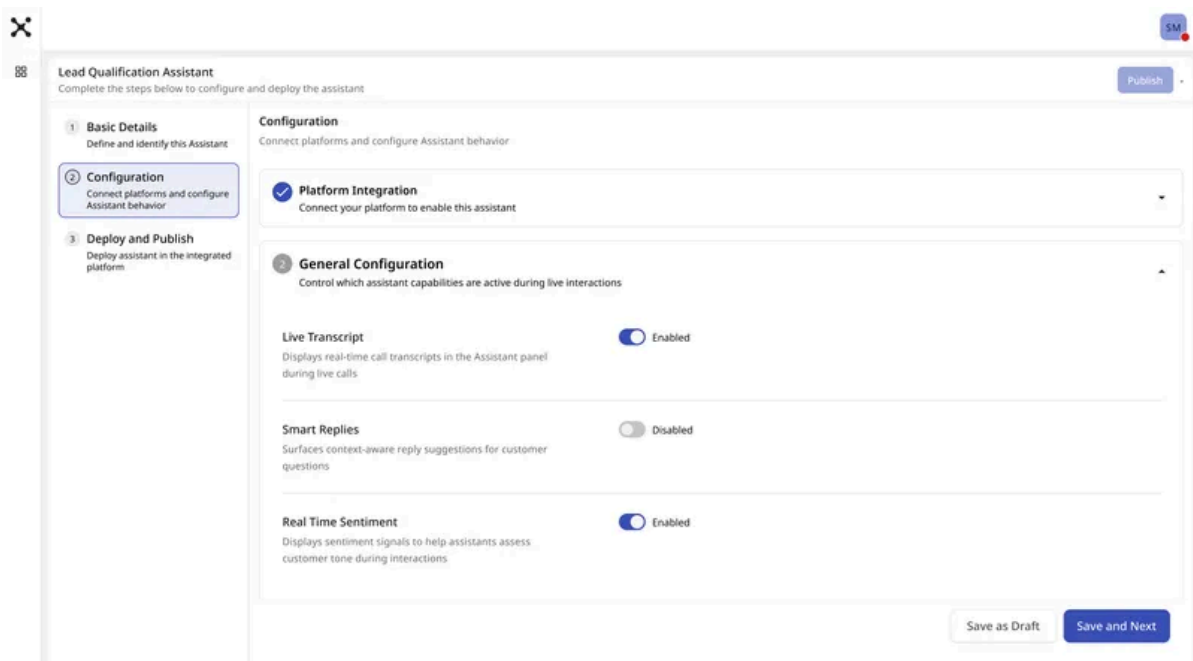
■ What happens after this step

- Relevant Smart replies appear in real time for the selected channel.

3. Enable/Disable Real time customer sentiment

■ What happens after this step

- Agent see live sentiment of the customer during the interaction.



4. Click on Save and Next to proceed for deployment.

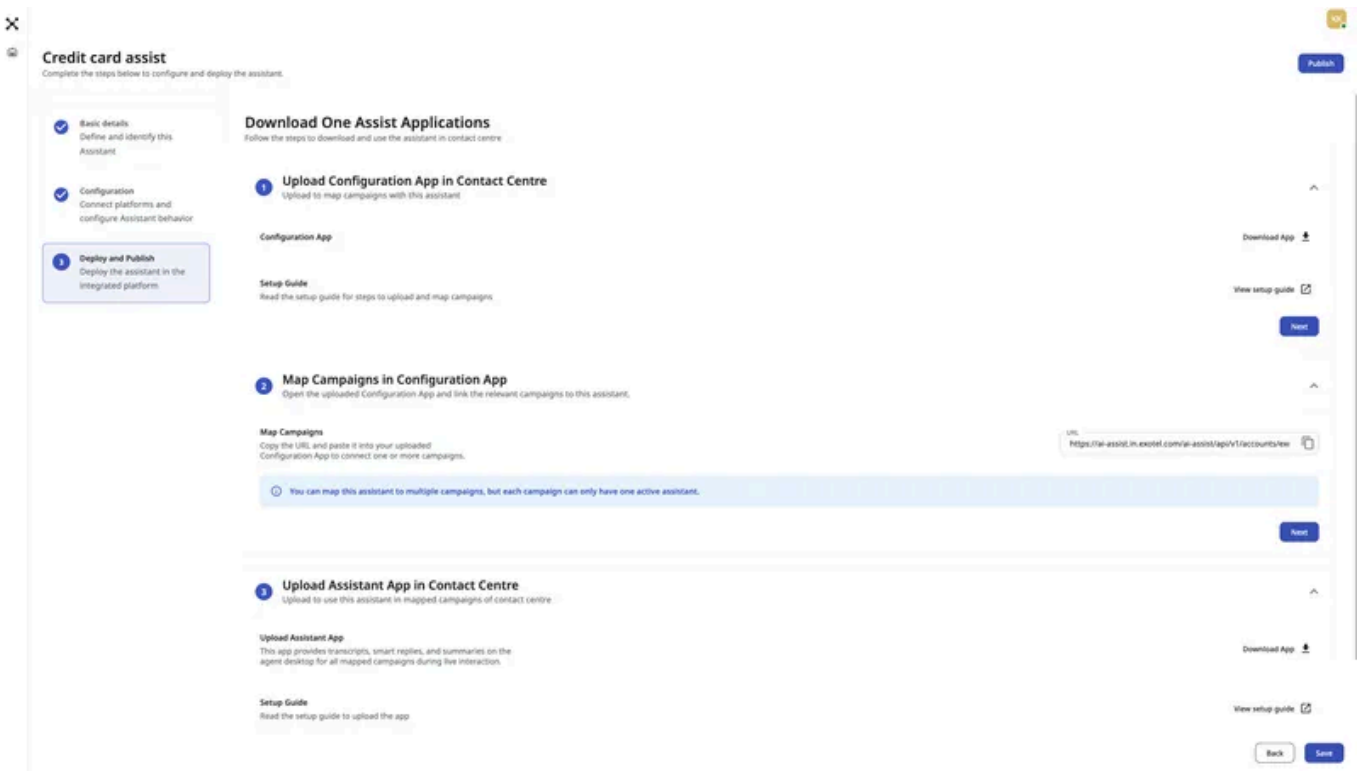
Save and Next

Step 5: Deploying AI Assist Application

What to do

[Check Detailed Steps for Deployment Here](#)

1. Go to **Deployment**.
2. Download the Configuration Application.
3. Upload the Configuration Application in the Contact Centre. Confirm the placement as 'Top Bar Global' in the contact centre.
4. Map the relevant campaign to the assistant URL. This will enable the call streaming for the assistant.
5. Now Download the AI Assist Assistant package.



3. Upload it into the Contact Center.

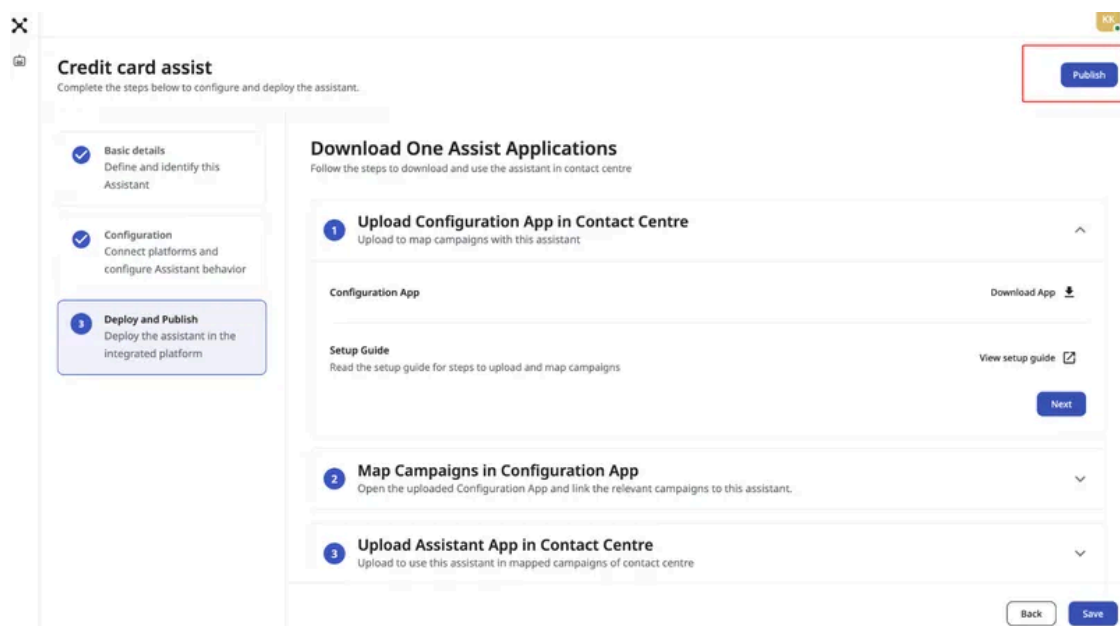
4. Place the Assistant in the Agent Desktop. Confirm placement as **Right-side Panel**.

5. Map the Assistant with relevant Campaign under respective Process in the Contact Centre.

Step 6: Publish the AI Assist Assistant

What to do

- Publish the Assistant in the AI Assist Portal (<https://ai-assist.in.exotel.com/>)



What happens after this step

- Once Published, the AI Assist Assistant status will change to "Live."
 - The Assistant will then appear in the Agent Desktop for all mapped campaigns within the Exotel Contact Centre.
-

Agent Experience In Live Interaction

1. AI Assist Assistant Panel Behavior: Panel is available in the agent desktop automatically when a call or chat starts.
 2. Suggestion View (Chat and Voice): Smart Replies shown in the Suggestion tab.
 1. Agents can **copy the suggestion** to clipboard.
 2. Paste directly into chat or use as call guidance.
 3. Transcript Visibility Rules
 1. **Voice:** Transcript is visible.
 2. **Chat:** Transcript view is **hidden** in the AI Assist Panel.
 4. Real Time Sentiment
 1. Real time sentiment status like - Displays the customer's current mood as Positive, Neutral, or Negative based on the ongoing conversation.
-

Testing the Setup

Voice Testing

- Make a real inbound or outbound call.
- Verify transcript, suggestions, and wrap-up.

Chat Testing

- Start a real chat from a mapped queue.
- Verify Smart Suggestions appear.
- Confirm no transcript panel is shown.

Important:

Only real voice calls or real chats validate success.

2. Edit, Manage, and Re-Publish an Assistant

This guide explains how to update an existing **AI Assist** after it has already been created and deployed.

Use this guide when you need to:

- Add new or updated SOPs, FAQs, or scripts
- Change what the assistant should say or suggest
- Turn Voice or Chat on or off
- Enable or disable Smart Replies, Transcript, or Sentiment
- Fix a wrong or outdated setup

Before You Start

Make sure:

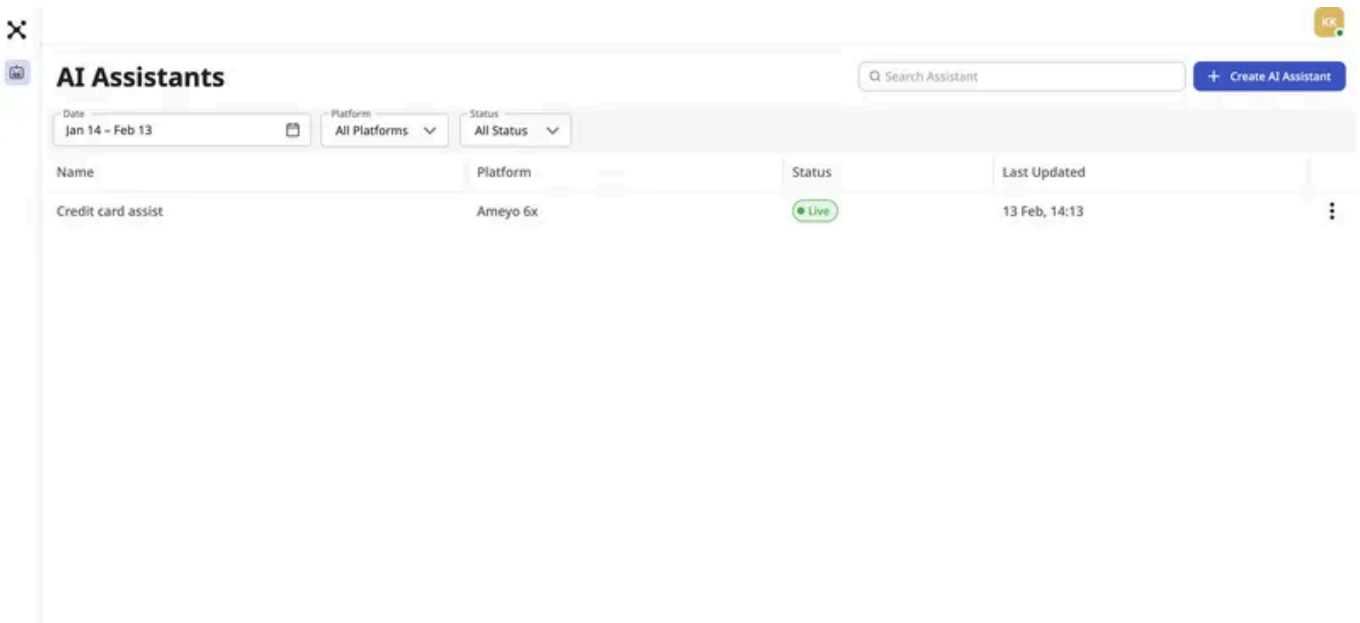
- You already have at least one AI Assist created
- The assistant is already deployed in the Contact Center
- It is mapped to at least one campaign
- You can make a real test call or start a real chat

Step-by-Step Guide

Step 1: Open the Assistant

What to do

- Log in to <https://ai-assist.in.exotel.com/>
- You will see a list of AI Assist Assistants
- Find the assistant you want to update
- Click **Edit**



What happens after this step

The assistant opens in the same setup screens used during creation.

You can now review and change its settings.

Step 2: Edit Basic Details and Behavior

What to do

- Update the assistant name if needed
- Update the description
- Update the purpose and behavior of the assistant

This controls what kind of help the assistant gives to agents.

Credit card assist
Complete the steps below to configure and deploy the assistant.

1 Basic details
Define and identify this Assistant

2 Configuration
Connect platforms and configure Assistant behavior

3 Deploy and Publish
Deploy the assistant in the integrated platform

Basic details
Enter the core information to define and identify your assistant.

Assistant name *
Used to identify this configuration in campaign mapping, reporting, and audits.
Credit card assist

Interaction channels *
Select the interaction types where assistant will be available.
 Voice
Assistant is available during voice calls.

Description *
Define the purpose and behaviour of this assistant to govern AI assistance
The AI Assist agent is designed to support contact center representatives by providing real-time, context-aware suggestions during customer interactions. This tool is specifically tailored for technical support and customer service queues, focusing on resolving customer inquiries efficiently and accurately. The AI agent surfaces relevant knowledge base articles, standard operating procedures, and compliance guidelines to assist agents in delivering consistent and informed responses. It helps with eligibility rules, objection handling scripts, and disposition guidance, ensuring that agents have the necessary information at their fingertips. The primary goal is to achieve faster resolution times, maintain consistent messaging, and reduce the need for escalations, ultimately enhancing customer satisfaction and operational efficiency.
842/3000

Add documents
Add documents your assistant can refer to and learn from to give better, more accurate responses.

Next

Step 3: Update Reference Documents

What to do

- Add new SOPs, FAQs, or scripts
- Remove outdated or wrong documents
- Replace old files with new versions

Only upload documents that match the assistant's use case.

Add Documents

Add documents your assistant can refer to and learn from to give better, more accurate responses

#	Document name	Type	Size	Status	
1	Fraud Handling Guide	PDF	2.4...	● Ready	✕
2	KYC Process Document	DOCX	1.2...	<div style="width: 81%;"><div style="width: 81%;"></div></div> 81%	✕
3	Customer Support FAQs	TXT	320...	● Ready	✕
4	Dispute Resolution SOP	PDF	3.6...	● Failed	✕
5	Product & Policy Overvi...	XLS	900...	● Ready	✕

What happens after this step

The new documents are indexed and prepared for use.

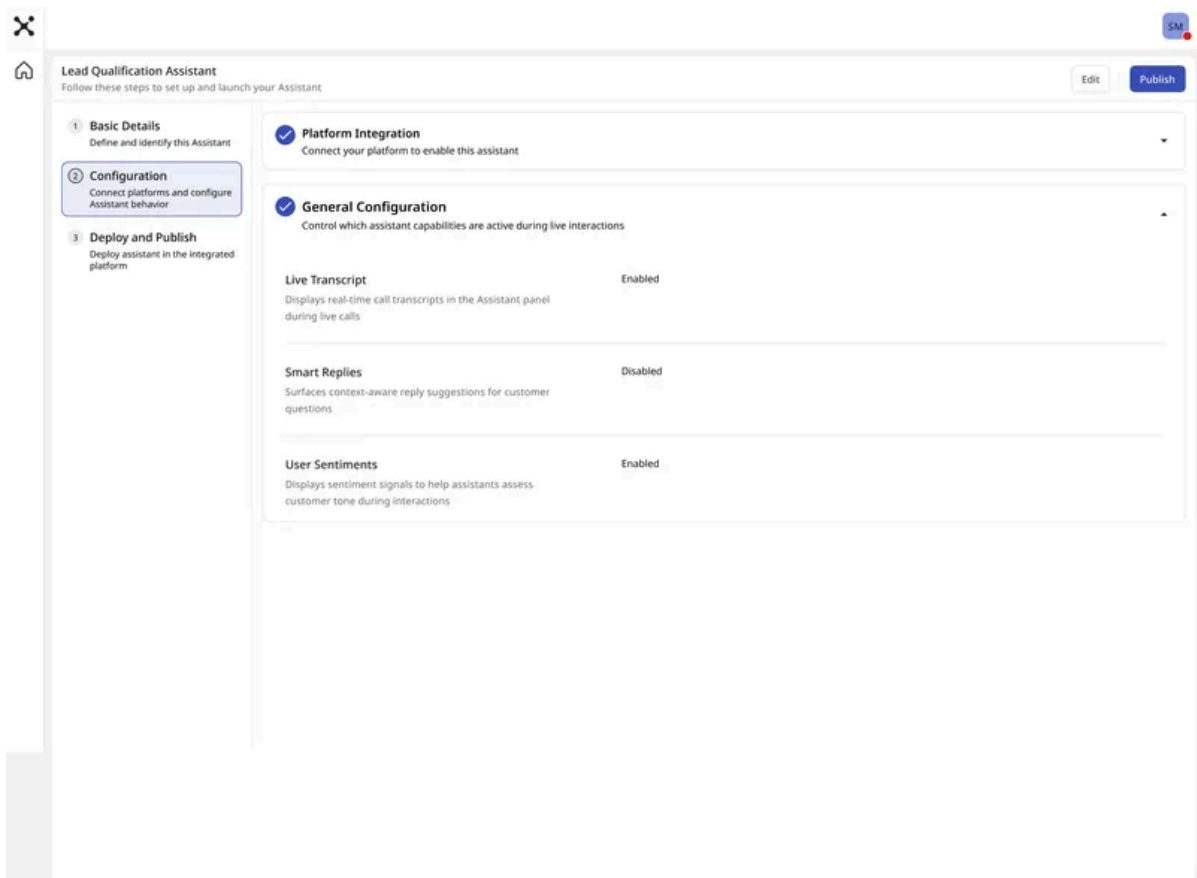
They will not be used by agents until the assistant is re-published.

Step 4: Change Channels and Features

What to do

You can enable or disable:

- Live transcript (Voice only)
- Smart Replies
- Real-time sentiment



What happens after this step

The new settings are saved.

They will not affect agents until you re-publish.

Step 5: Save Changes

What to do

- Click **Save and Next** to complete the edit flow

What happens after this step

Your updates are stored in AI Assist.

Agents still see the old version.

Step 6: Re-Publish the Assistant

What to do

- Click **Publish**



Publish

What happens after this step

The updated version becomes the new Live version.

The old version is replaced.

This step is required for any change to take effect.

Clear Rules

Editing

- Editing only saves changes
- It does not affect live agents

Re-publishing

- Re-publishing makes changes active in AI Assist
- Agents still need the updated package if required

Testing the Updated Assistant

Only real interactions confirm success.

Voice Testing

What to do

- Make a real inbound or outbound call on a mapped campaign

What to check

- Transcript appears
- Smart Replies match the new documents
- Sentiment is correct

Chat Testing

What to do

- Start a real chat from a mapped queue

What to check

- Smart Replies match the new documents
- No transcript panel is shown
- Replies follow the new behavior

3. Deploy Configuration App in Exotel Contact Centre

This guide explains how to install and configure the **AI Assist Configuration App**, which is the first step in deploying your AI Assist Assistant.

The Configuration App connects:

Campaign ID (from Contact Center)

Assistant URL (from AI Assist Portal)

Without this step, the Assistant App will not function correctly.

Before You Start

Make sure the following are ready:

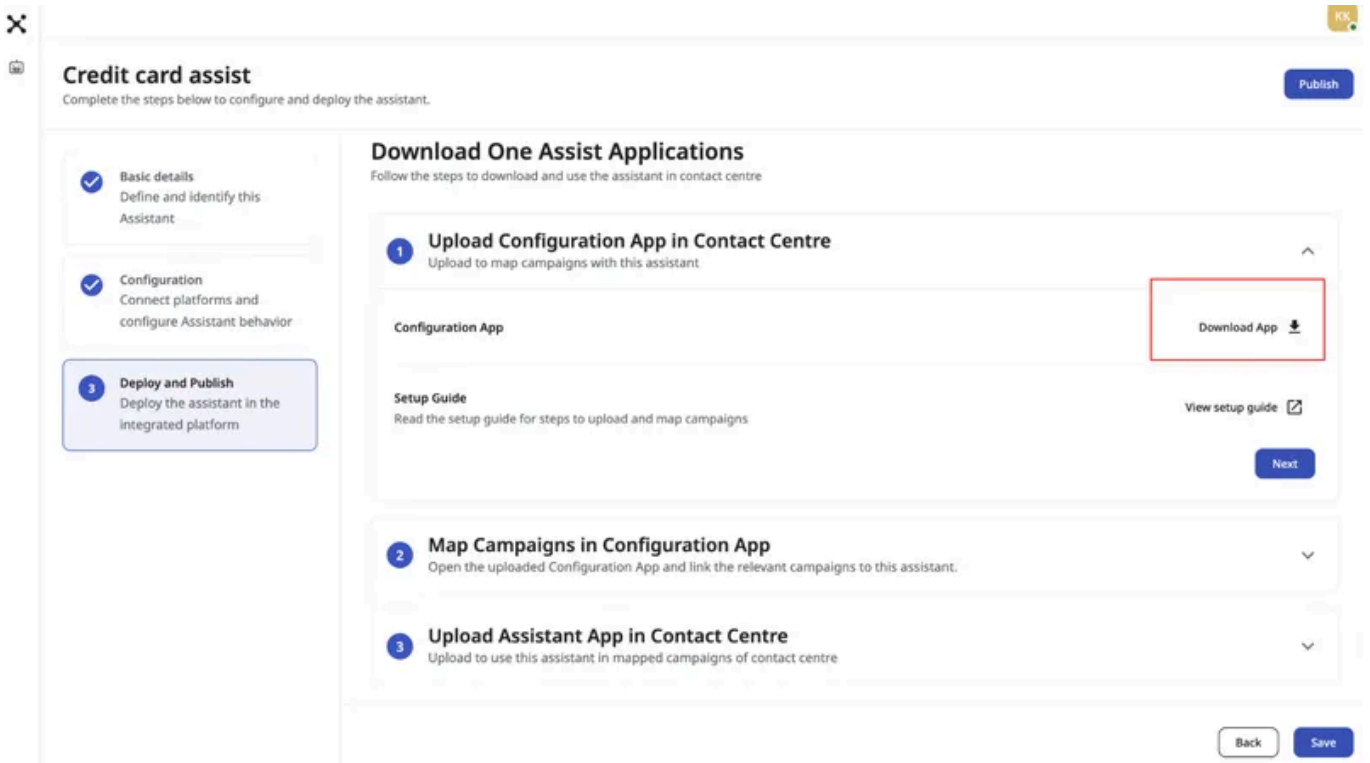
- Your AI Assist Assistant is already created in the AI Assist portal
- Your campaign is already created in the Contact Center
- You have administrator access to the Contact Center
- You have downloaded the AI Assist Configuration App file (.aaex format)

If any of these are missing, complete them first.

Step 1: Download the Configuration App

From the AI Assist portal:

- Go to the Assistant deployment section
- Select **Download Configuration App**
- The file will download in .aaex format



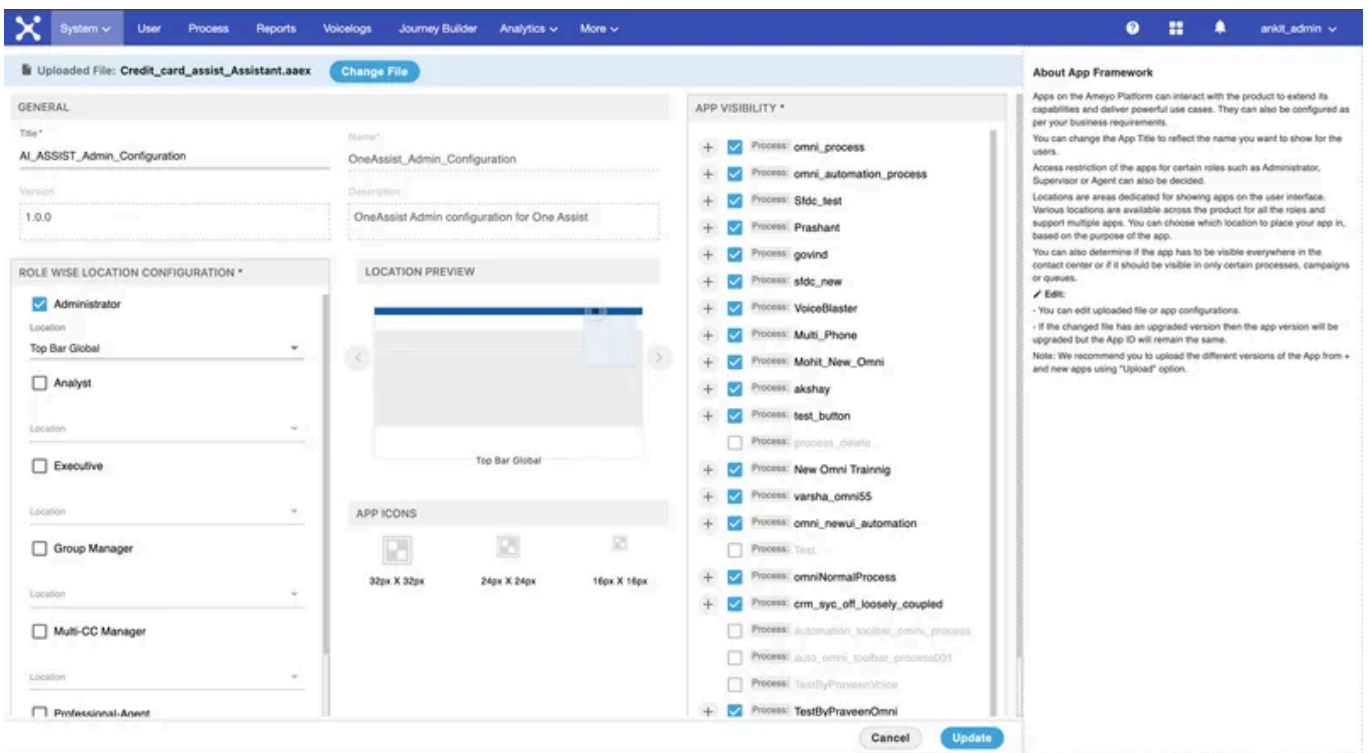
This app is required before installing the Assistant App.

Step 2: Upload the Configuration App in Contact Center

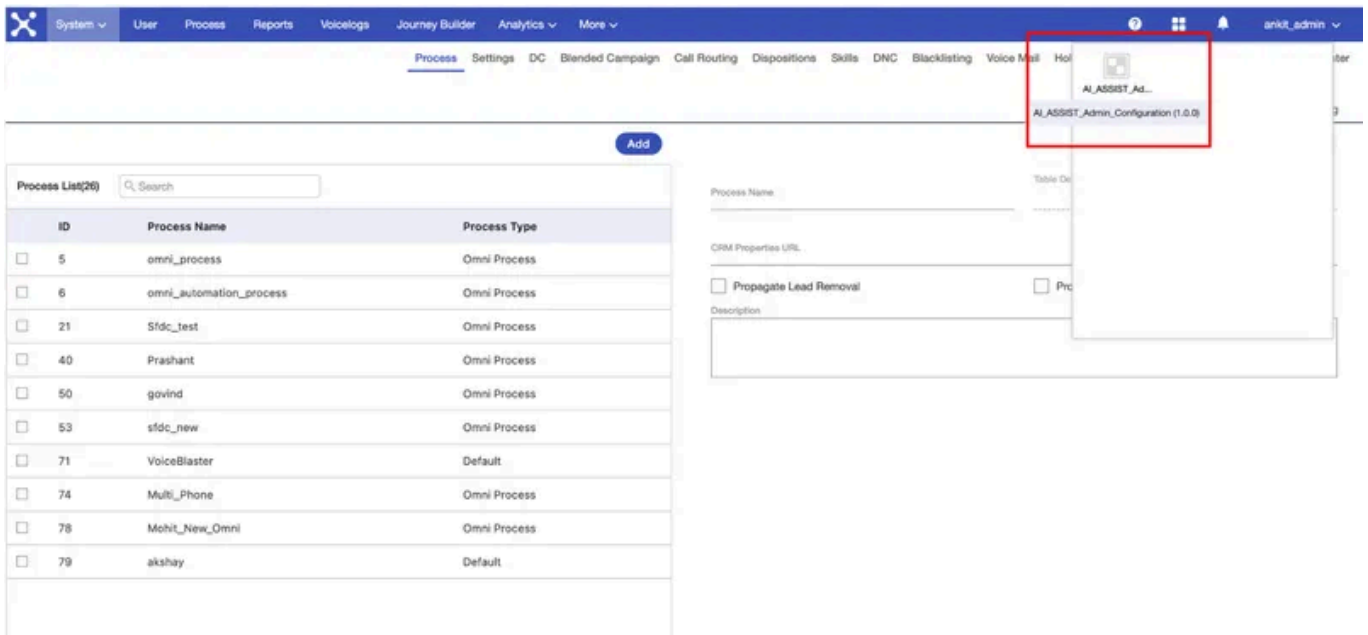
Sign in to the Contact Center using an administrator account.

Then:

- Open the **App Configuration** tab
- Go to the section where applications are managed
- Upload the .aaex file you downloaded
- Wait for upload to complete



Once uploaded, the Configuration App will appear in your system.



Step 3: Map Campaign ID and Assistant URL

This is the most important step.

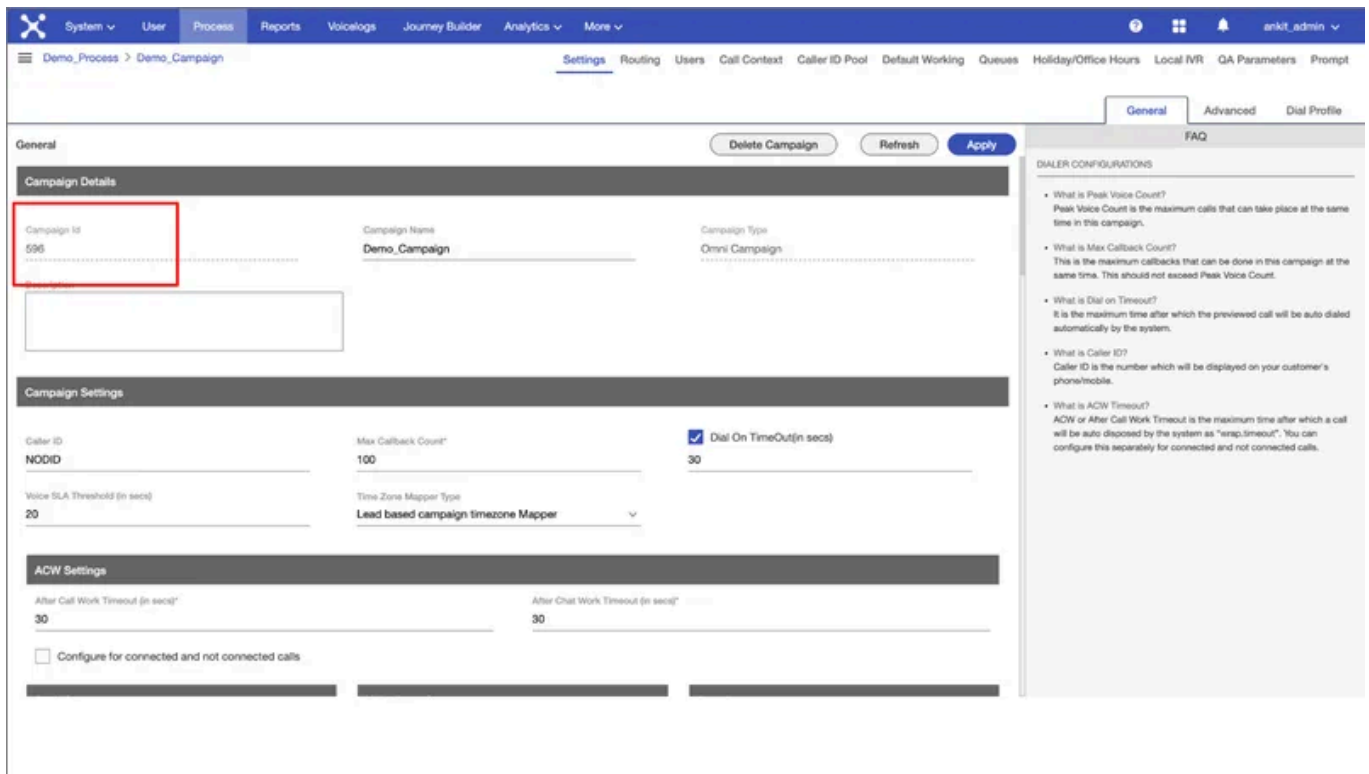
Open the Configuration App settings.

You will see two required fields:

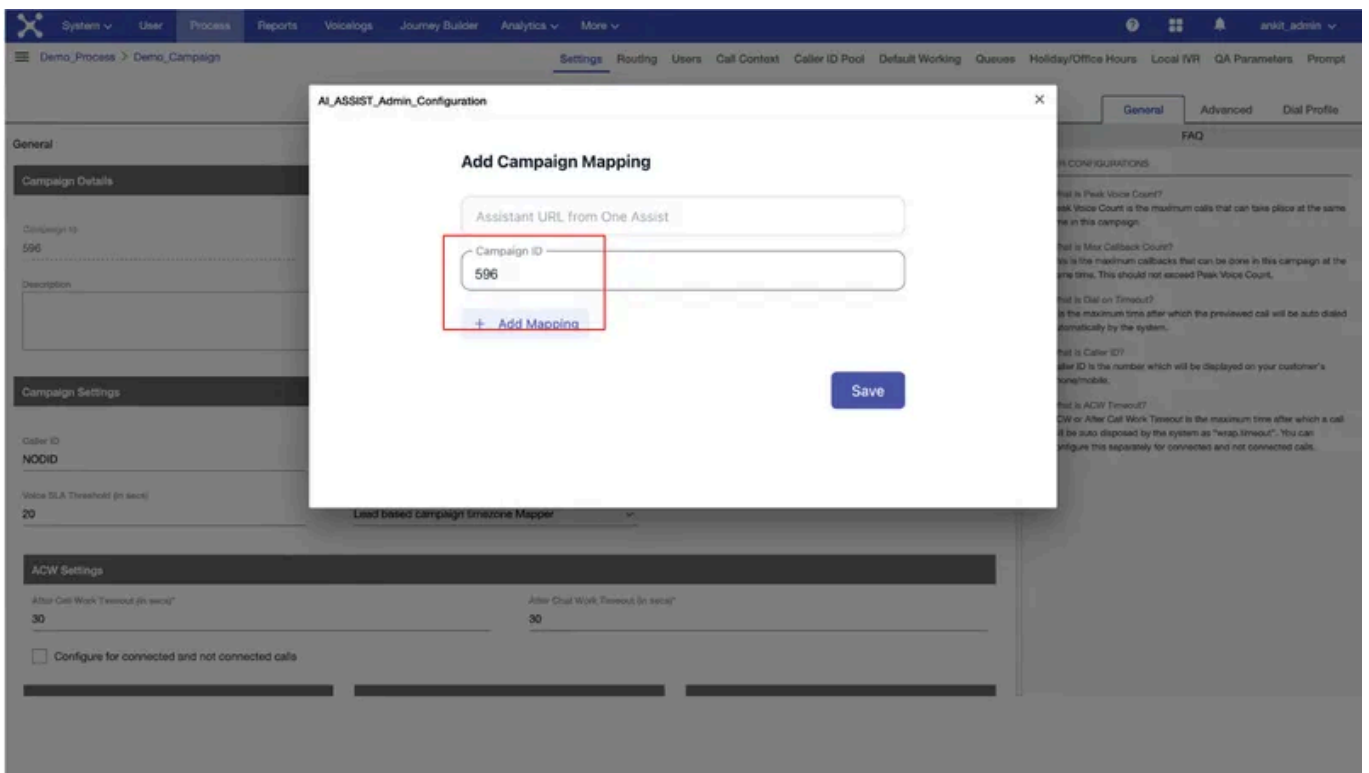
1 Campaign ID

Where to find it:

- Go to the Campaign page in Contact Center
- Copy the Campaign ID of the campaign that sends live audio



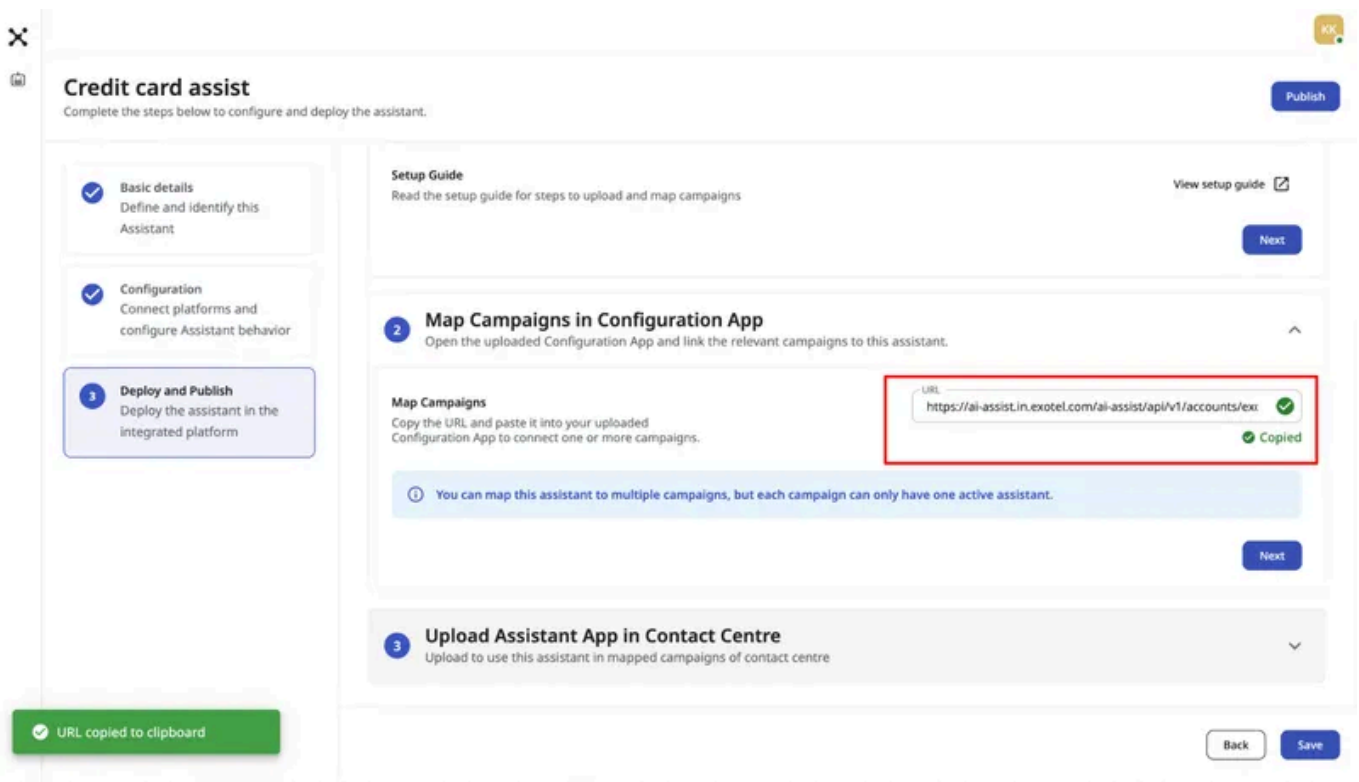
Paste it into the Campaign ID field.



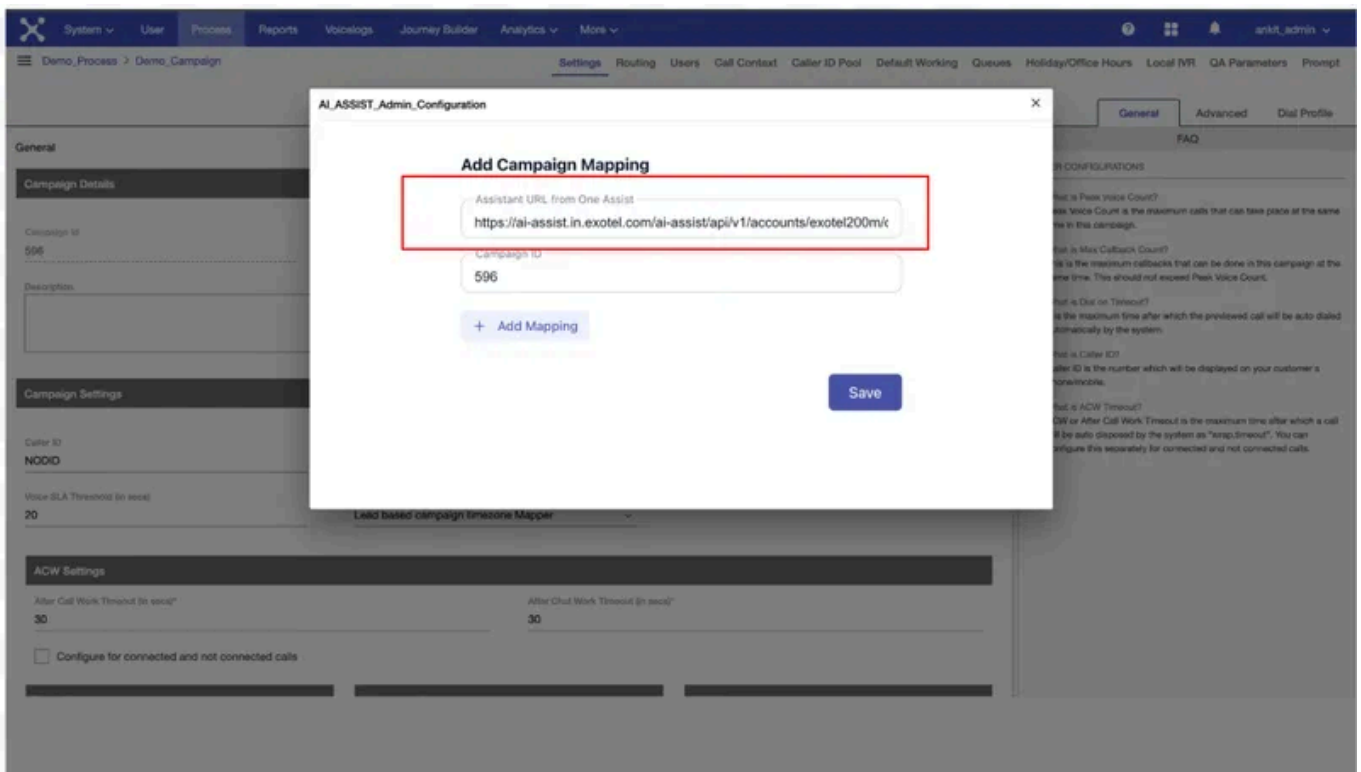
20 Assistant URL

Where to find it:

- Go to the AI Assist Portal
- Open your Assistant
- Navigate to **Map Campaign** step
- Copy the Assistant URL shown there



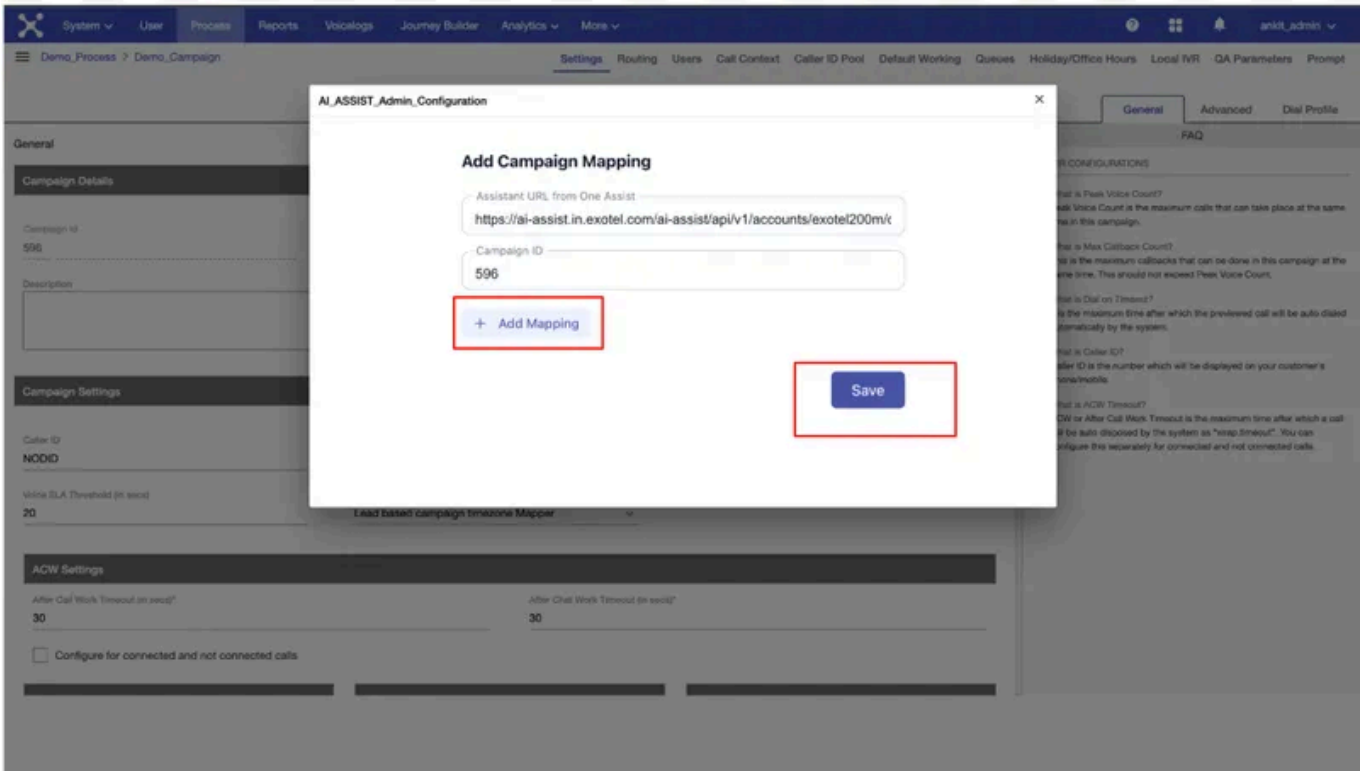
Paste it into the Assistant URL field.



After entering both values:

- Click **+ Add Mapping** to confirm the mapping
- Click **Save**

- Apply changes



If either value is incorrect, the Assistant will not work.

Step 4: Verify Configuration

Before moving forward, confirm:

- Campaign ID is correct
- Assistant URL is correct
- Configuration is saved successfully

Only after this step should you proceed to install the Assistant App.

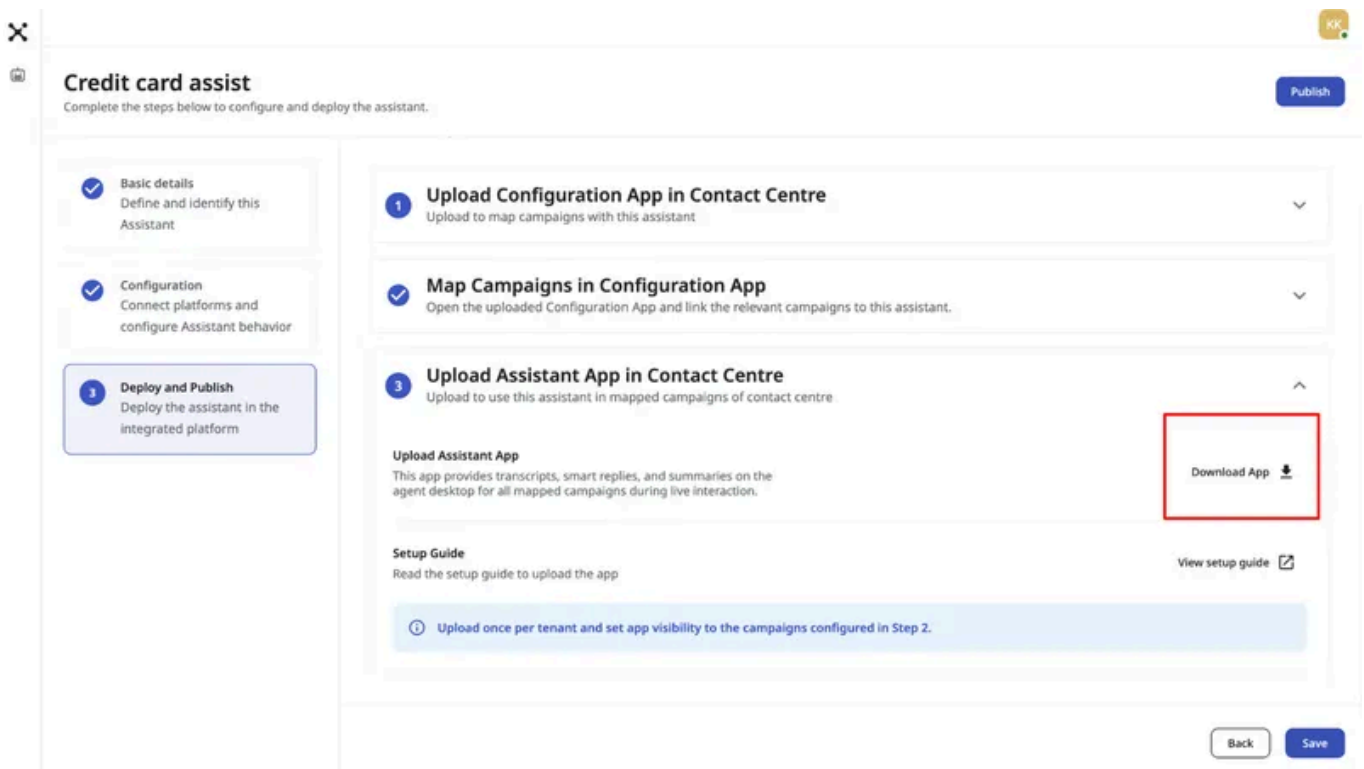
4. Deploy Assistant in Exotel Contact Center

This guide helps you make your AI Assist Assistant available to agents during live calls.

Before You Start

Please make sure the following are ready:

- Your AI Assist Assistant is already created in the portal
- The AI Assist **Configuration App is already installed in your Contact Center**
- The correct Campaign ID is already mapped with the Assistant URL in the Configuration App
- You have downloaded the Assistant application file (file format ends with .aex)



- Your calling campaign is already set up to send live audio
- You have administrator access to the Contact Center

ID	Process Name	Process Type	
<input type="checkbox"/>	72	Telecom	Default
<input type="checkbox"/>	78	Hotel Booking	Default
<input type="checkbox"/>	82	SP Madrid	Default
<input type="checkbox"/>	85	Banking Process	Default
<input type="checkbox"/>	94	HT Mint	Default
<input type="checkbox"/>	99	AWNIC	Default
<input type="checkbox"/>	130	HCG_Demo_Setup	Default
<input type="checkbox"/>	132	Facebook_Test_Process	Default
<input type="checkbox"/>	154	SBI	Default
<input type="checkbox"/>	155	Yogi_test	Default

If any of these are missing, complete them first before continuing.

⚠ Important:

If the Configuration App is not installed or campaigns are not mapped correctly, the Assistant App will appear but will not function.

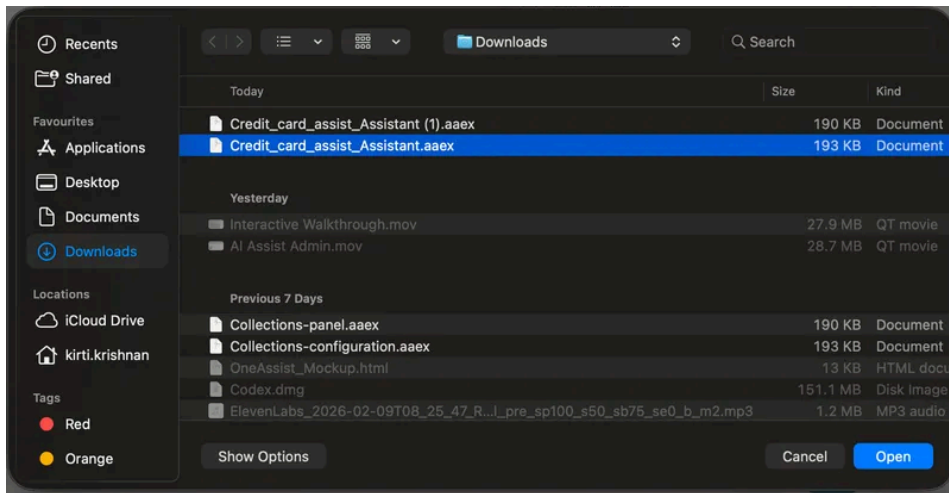
Step 1: Upload the Application

1. Sign in to the Contact Center using an administrator account
2. Open the App Configuration tab

ID	Process Name	Process Type	
<input type="checkbox"/>	72	Telecom	Default
<input type="checkbox"/>	78	Hotel Booking	Default
<input type="checkbox"/>	82	SP Madrid	Default
<input type="checkbox"/>	85	Banking Process	Default
<input type="checkbox"/>	94	HT Mint	Default
<input type="checkbox"/>	99	AWNIC	Default
<input type="checkbox"/>	130	HCG_Demo_Setup	Default
<input type="checkbox"/>	132	Facebook_Test_Process	Default
<input type="checkbox"/>	154	SBI	Default
<input type="checkbox"/>	155	Yogi_test	Default

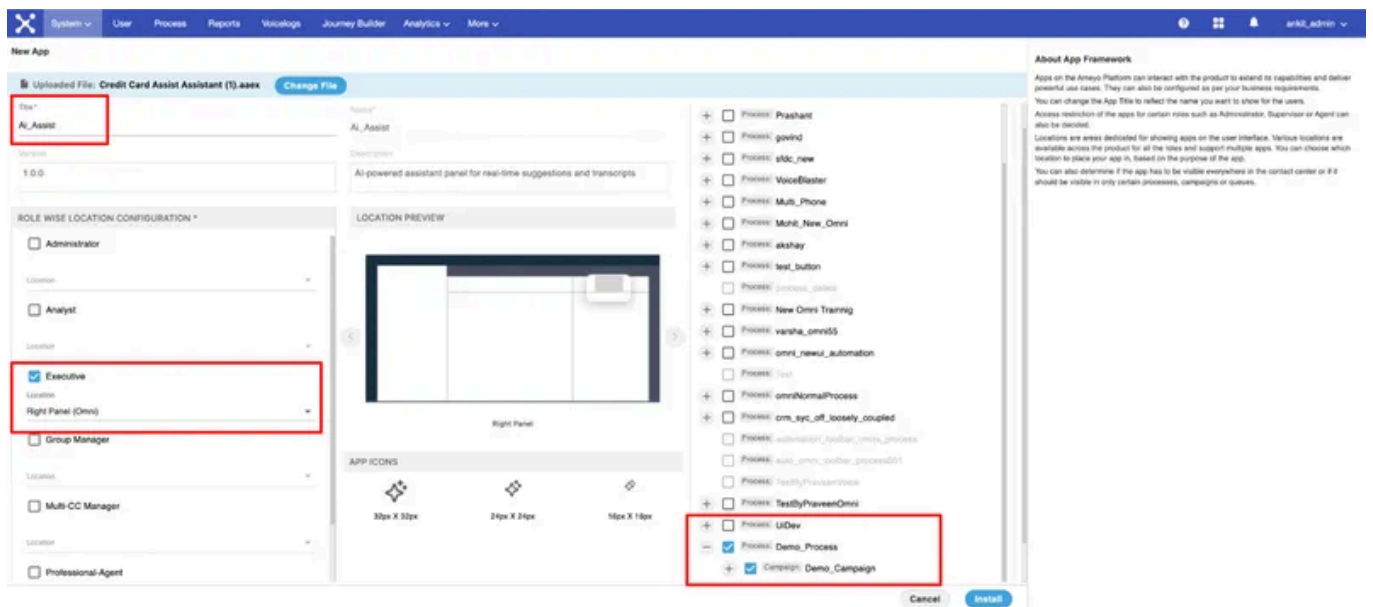
3. Go to the section where applications are managed

4. Upload the .aaex file you downloaded earlier



1. Wait until the upload finishes

Once the upload is complete, the application will appear in your system and is ready to be configured.



Step 2: Choose Where the Assistant Appears

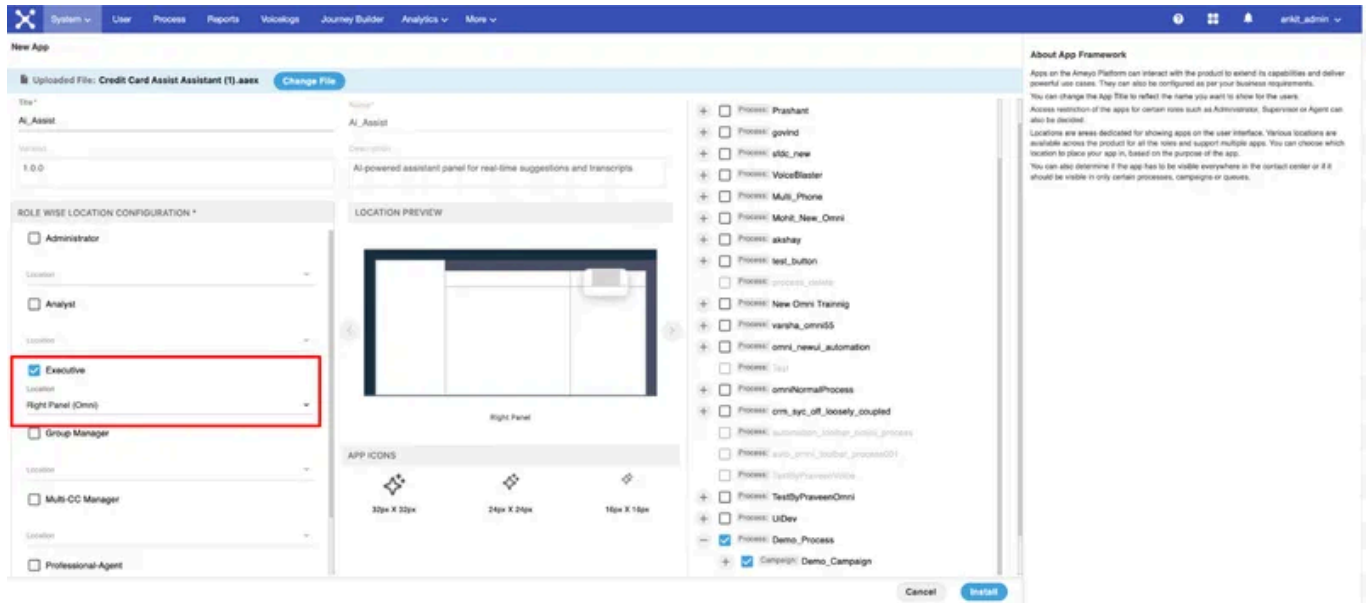
This step controls **where agents see the Assistant during calls**.

Recommended placement

Place the assistant in the right-side panel of the agent desktop.

This layout ensures:

- The assistant is visible during live calls
- Transcripts and suggestions update correctly
- The panel can open automatically when a call starts in agent desktop



What to avoid

Do not place the agent in:

- Background-only areas
- Customer record sections
- Header-only or menu-only areas

These locations may load the app but will not support live call assistance properly.

Step 3: Decide Who Can See the Assistant

Next, choose which user roles can access the assistant.

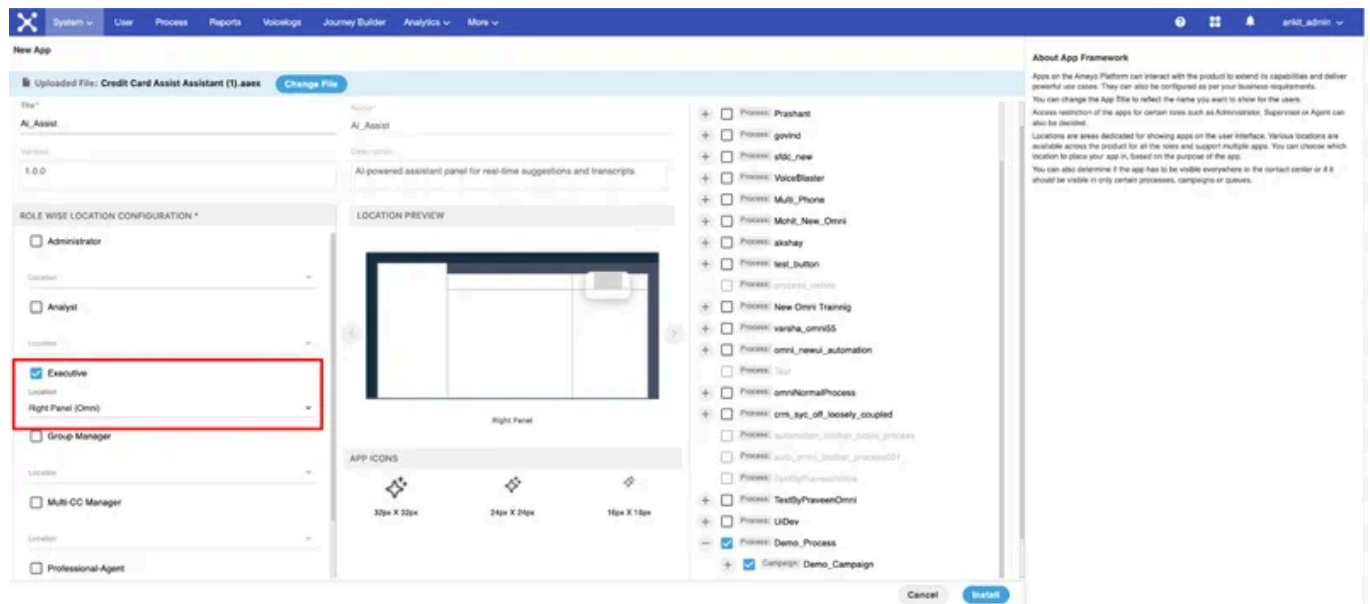
At minimum, make sure:

- **Agents are enabled**

You may also allow access for:

- Supervisors
- Administrators

If agents are not enabled, the assistant will never appear for them, even if everything else is correct.



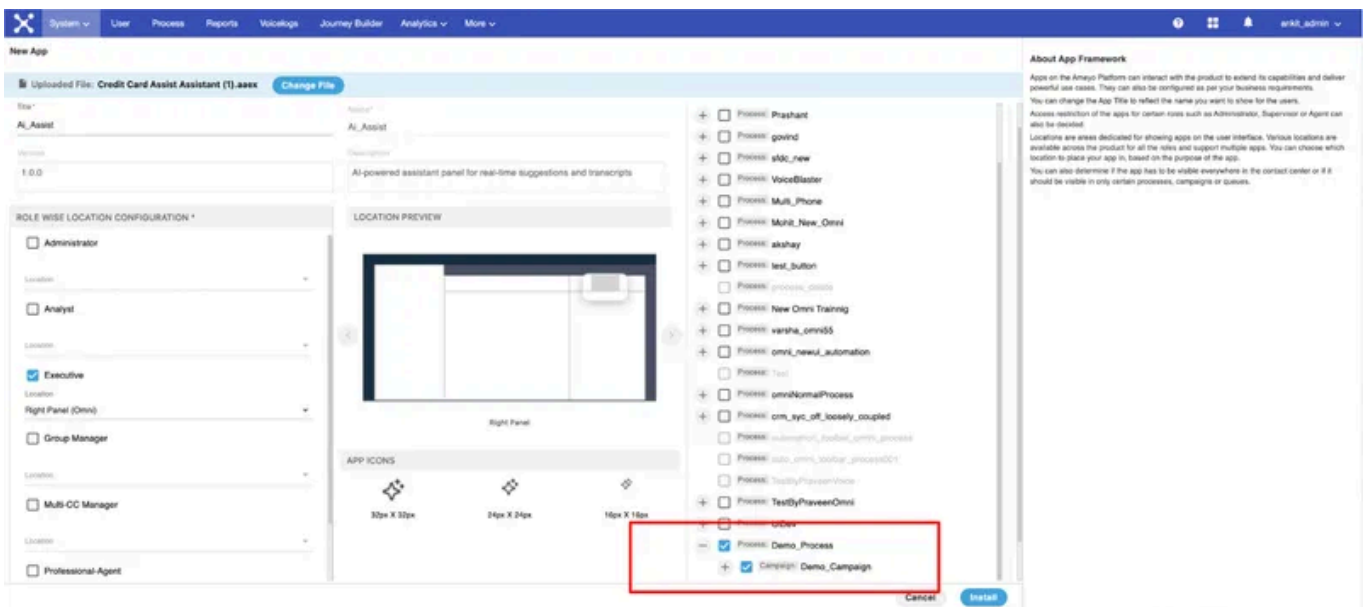
Step 4: Control When the Assistant Appears

Now choose **when** the assistant should be visible.

Select only:

- The exact campaigns that are mapped to this assistant in the ai assistant portal.

If the assistant is enabled for the wrong campaign, it may appear but will not work.



Step 5: Save and Apply Settings

After reviewing all selections:

1. Save the configuration
2. Apply or install the changes
3. Wait for confirmation

The assistant is now available in the Contact Center, but it is not active yet.

Step 6: Publish the Assistant

To make the AI Assistant actually work:

1. Go back to the AI Assistant portal
2. Open your assistant
3. Select the option to publish it

Until this step is completed, the assistant will not respond during calls.

Credit card assist
Complete the steps below to configure and deploy the assistant.

Basic details
Define and identify this Assistant

Configuration
Connect platforms and configure Assistant behavior

3 Deploy and Publish
Deploy the assistant in the integrated platform

Download One Assist Applications
Follow the steps to download and use the assistant in contact centre

1 Upload Configuration App in Contact Centre
Upload to map campaigns with this assistant

Configuration App Download App

Setup Guide View setup guide

Read the setup guide for steps to upload and map campaigns Next

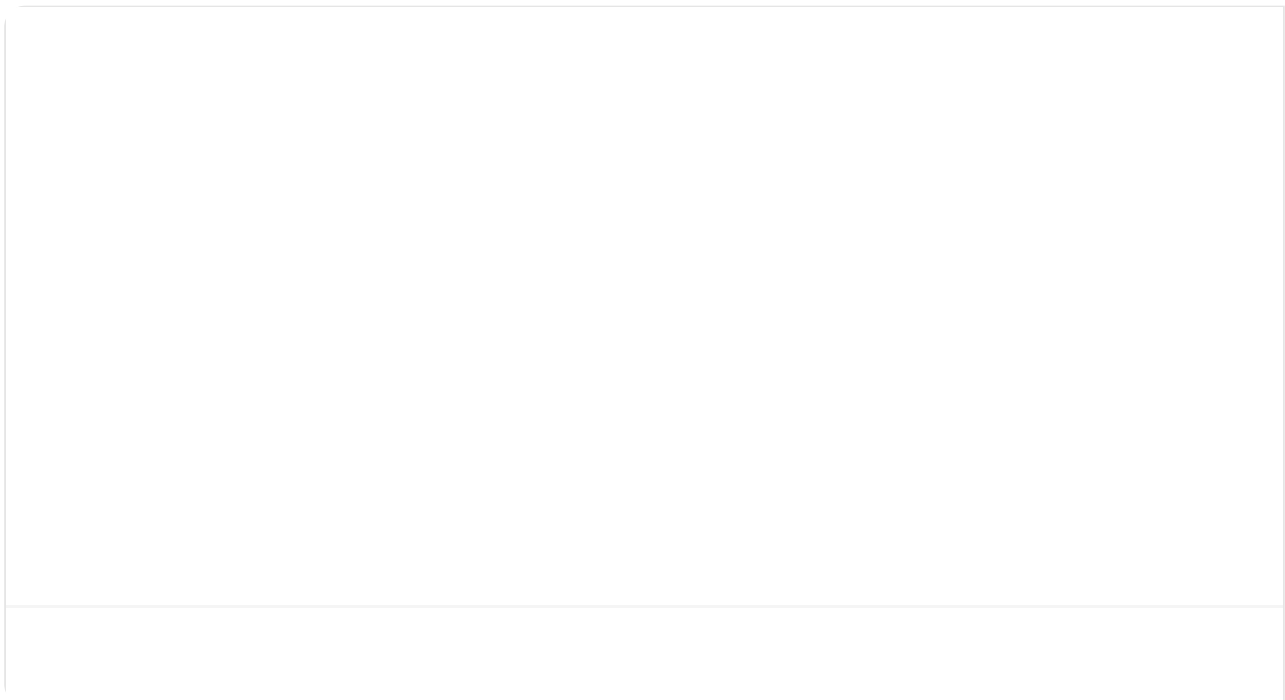
2 Map Campaigns in Configuration App
Open the uploaded Configuration App and link the relevant campaigns to this assistant.

3 Upload Assistant App in Contact Centre
Upload to use this assistant in mapped campaigns of contact centre

Back Save

Step 7: Test with a Real Call

The only correct way to test the assistant is with a live call.



How to test

1. Sign out of the administrator account
2. Sign in as an agent
3. Start a test call using the enabled campaign

4. During the call, check that:

- The assistant appears on the right side
- Live text starts showing
- Suggestions begin appearing (if configured)

If this works, your setup is complete.

Quick Checklist

Before you finish, confirm all of the following:

- Application file uploaded successfully
- Assistant placed in right-side panel and right-side bar
- Agent role enabled
- Correct campaign selected
- Assistant published in the AI portal
- Tested using a real call

If all items are checked, your AI Assistant is live.

5. AI Assist in Exotel Platform

Welcome! This guide will walk you through setting up AI Assist on Exotel Platform, from creating your first assistant to deploying it in live Exotel Platform.

Overview

AI Assist is a real-time AI-powered panel that integrates with Exotel's contact center platform to help agents handle calls more effectively. It provides:

- **Live Transcription** - Real-time transcription of agent-customer conversations
- **Smart Replies** - AI-generated suggested responses to help agents respond faster
- **Real-time Sentiment** - Automatic detection of customer sentiment during calls

Prerequisites

Before you begin, ensure you have:

1. **Admin Access** to Exolite (your Exotel contact center platform)
 - Access to `my.in.exotel.com` or `my.exotel.com`
 - Tenant Admin role with flow management permissions
2. **Platform Requirements**
 - Exotel Platform account with Exophone flow engine enabled
3. **Understanding of Basic Concepts**
 - Exophone
 - Exotel App Flows
 - Stream Applet (part of Exotel Platform), Connect Applet, Transfer Applet

Step 1: Create an AI Assist Assistant

1.1 Access the Ai Assist Portal

1. Log in to your Exotel account at `my.in.exotel.com` or `my.exotel.com`

2. Click **AI Assist** under **HOUSE OF AI** in the left nav bar to access **Ai Assist Portal** `ai-assist.exotel.com`

The screenshot shows the Exotel dashboard interface. On the left is a blue navigation sidebar with the following sections: Dashboard, CALLS (Inbox, Call Analytics, Call Settings), HOUSE OF AI (NEW) (AI Voice Agents, AI Assist), SMS (Outbox, Upload Templates (BETA), SMS Analytics, SMS Settings), TOOLS (WhatsApp, RCS, ExoVerify, Campaigns), and MANAGE (Address book, Co-workers and Groups). A red arrow points to the 'AI Assist' menu item. The main content area at the top has buttons for CALL, SMS, TRANSFER, and API Credentials. Below is a 'Refresh' button and a table of call logs.

FROM	TO	DIRECTION	EXOPHONE/FLOW	TIME	OU
09513702491	0962466665	Outgoing	09513702491	2 mins ago	
Deccan Herald	P	Incoming	Pratiksha Inside sales flow	6 mins ago	
09915002905		Incoming	Divya_Bevainmobile	8 mins ago	
09915002905	DB	Incoming	inside sales_divya bevinfl	9 mins ago	
07039797784	VS	Incoming	Vaishnavi Main_Flow	9 mins ago	
Anushka Priya	Shival Kathe	Outgoing	08047095858	10 mins ago	
09513702491	0962466665	Outgoing	09513702491	10 mins ago	
P Rachana Bhat	0702530005	Outgoing	09513702489	10 mins ago	
Adeep K P	09819732378	Outgoing	09240083949	11 mins ago	
07671005711		Incoming	09513702489	11 mins ago	
Ulkesh Thawkar	kumar	Outgoing	09240083952	11 mins ago	
07671005711		Incoming	09513702489	11 mins ago	

3. Login to `ai-assist.exotel.com` and Click Create AI Assistant.

The screenshot shows the 'AI Assistants' portal in a browser. The page title is 'AI Assistants'. There is a search bar and a '+ Create AI Assistant' button. Below the search bar are filters for Date (Mar 07 - Apr 06), Platform (All Platforms), and Status (All Status). A table with columns Name, Platform, Status, and Last Updated is visible but empty. In the center of the page, there is a large graphic with a briefcase icon and the text 'Create your first AI Assistant' and 'Use this assistant to provide ai assistance in live interaction'. A 'Create Now' button is located below this graphic.

Step 2: Create a New AI Assist Assistant

1. Click **Create Assistant**.

+ Create Assistant

2. Enter a clear name (example: *Voice & Chat Assist – Card Support*).
3. Define the purpose and behavior of this assistant to govern ai assistance

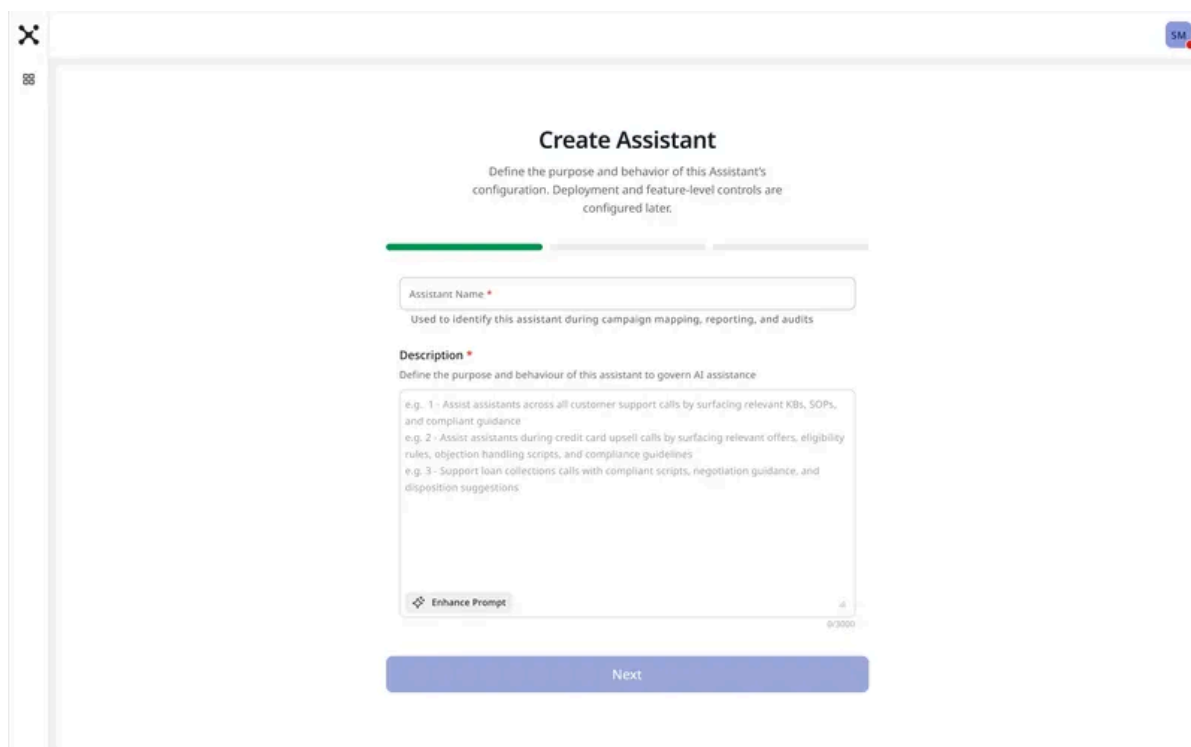
Some examples :

1. Assist agents across all customer support calls by surfacing relevant KBs, SOPs, and compliant guidance.

2. Assist agents during credit card upsell calls by surfacing relevant offers, eligibility rules, objection handling scripts, and compliance guidelines.

3. Support loan collections calls with compliant scripts, negotiation guidance, and disposition suggestions.

4. Click Next to proceed.



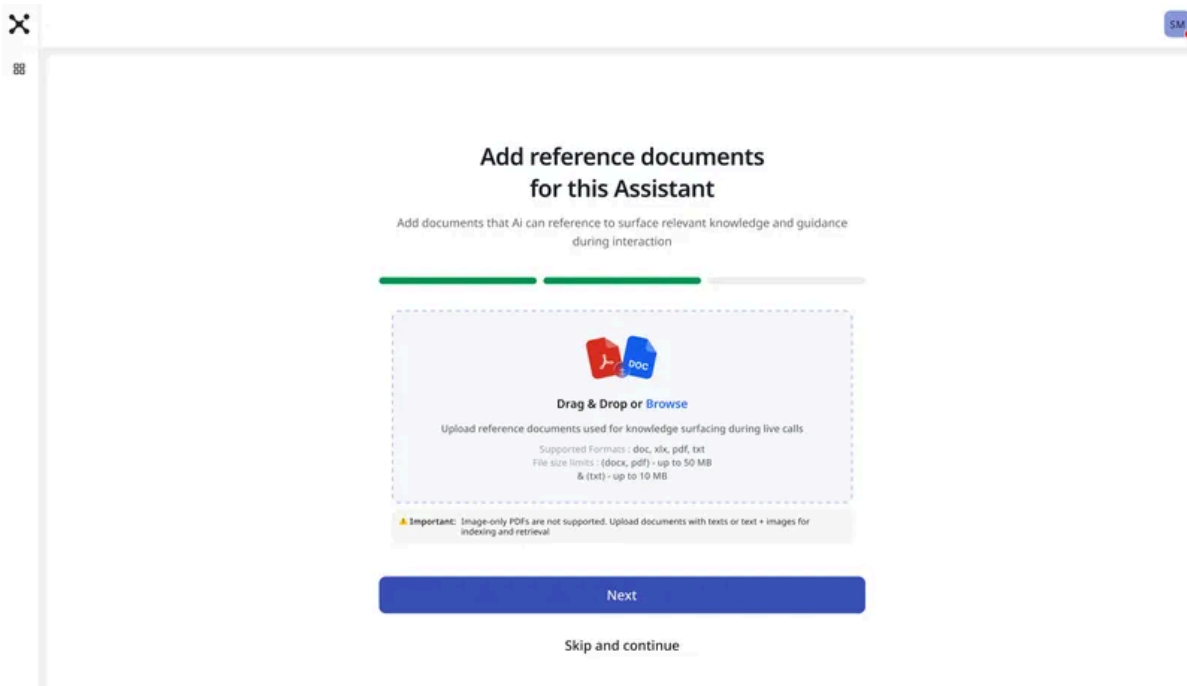
The screenshot shows a web interface for creating an AI assistant. At the top, there's a close button (X) and a user profile icon (SM). The main heading is "Create Assistant". Below it, a sub-heading reads: "Define the purpose and behavior of this Assistant's configuration. Deployment and feature-level controls are configured later." A progress bar is visible, with the first segment highlighted in green. The form contains two main input fields: "Assistant Name" with a red asterisk and a tooltip "Used to identify this assistant during campaign mapping, reporting, and audits"; and "Description" with a red asterisk and a tooltip "Define the purpose and behaviour of this assistant to govern AI assistance". The description field contains three example prompts: "e.g. 1 - Assist assistants across all customer support calls by surfacing relevant KBs, SOPs, and compliant guidance", "e.g. 2 - Assist assistants during credit card upsell calls by surfacing relevant offers, eligibility rules, objection handling scripts, and compliance guidelines", and "e.g. 3 - Support loan collections calls with compliant scripts, negotiation guidance, and disposition suggestions". At the bottom of the form, there is an "Enhance Prompt" button and a "Next" button.

Step 3: Upload Reference Documents

In this step, you upload reference documents that the **AI Assist Assistant** uses to surface **Smart Replies** during live interactions.

The quality and relevance of these documents directly determine **how the assistant behaves and what it suggests to agents**.

1. On the **Add reference documents for this Assistant** screen, upload documents that are **relevant to the assistant's intended behavior**:
 - Policies, SOPs, scripts, or FAQs that the assistant should follow
 - Content aligned to the use case (for example: card blocking, refunds, delivery issues)
2. Upload files by:
 - Dragging and dropping them into the upload area, **or**
 - Clicking **Browse** to select files from your system
3. Click **Next** to continue.



Important guidance on what to upload

For example:

- If the assistant is meant for **Card Support**, upload card-related SOPs and FAQs.
- If it is for **Delivery or Logistics**, upload delivery workflows and escalation guides.

Supported file formats and limits

- **Supported formats:** .doc, .xls, .pdf, .txt
- **File size limits:**
 - .doc, .pdf: up to **50 MB**
 - .txt: up to **10 MB**

Important :

Image-only PDFs are not supported. Upload documents that contain readable text (or text + images) so the content can be indexed and used for suggestions.

What happens after this step

- The uploaded documents are indexed.
- During live **voice calls or chat interactions**, AI Assist Assistant uses this content to:
 - Surface Smart Replies
 - Guide agents based on the defined behavior of the assistant

Optional: Skip for now

- You can click **Skip and continue** if documents are not ready.
- KB documents can be added or updated later by editing the AI Assist Assistant configuration.

What to avoid

- Do not upload unrelated or generic documents.
- Do not mix multiple use cases in a single assistant.
- Do not upload outdated or draft content.
- Do not upload scanned or image-only files.

Step 4: Configure Assistant

4.1. Review Basic Details and Select Channel

What to do

1. In Basic Configurations, Select one or both channels:

- **Voice**

Note: AI Assist behavior adapts based on the selected channel.

2. Review other basic details or Upload/Edit uploaded reference documents.

Lead Qualification Assistant
Complete the steps below to configure and deploy the assistant

1 Basic details
Define and identify this assistant

2 Configuration
Connect platforms and configure assistant behavior

3 Deploy and Publish
Deploy the assistant in the integrated platform

Basic details
Enter the core information to define and identify your assistant

Assistant name *
Used to identify this configuration in campaign mapping, reporting, and audits

Assistant Name *
Fraud Support Assistant

Interaction channels *
Select the interaction types where assistant will be available

Chat
Agents is available during chat-based interactions

Voice
Assistant assist is available during voice calls

Description *
Define the purpose and behavior of this assistant to govern ai assistance

Description *

e.g. 1 - Assist assistants across all customer support calls by surfacing relevant KBs, SOPs, and compliant guidance
e.g. 2 - Assist assistants during credit card upsell calls by surfacing relevant offers, eligibility rules, objection handling scripts, and compliance guidelines
e.g. 3 - Support loan collections calls with compliant scripts, negotiation guidance, and disposition suggestions

Add documents
Add documents your assistant can refer to and learn from to give better, more accurate responses

Drag & Drop or Browse
Upload reference documents used for knowledge surfacing during live calls

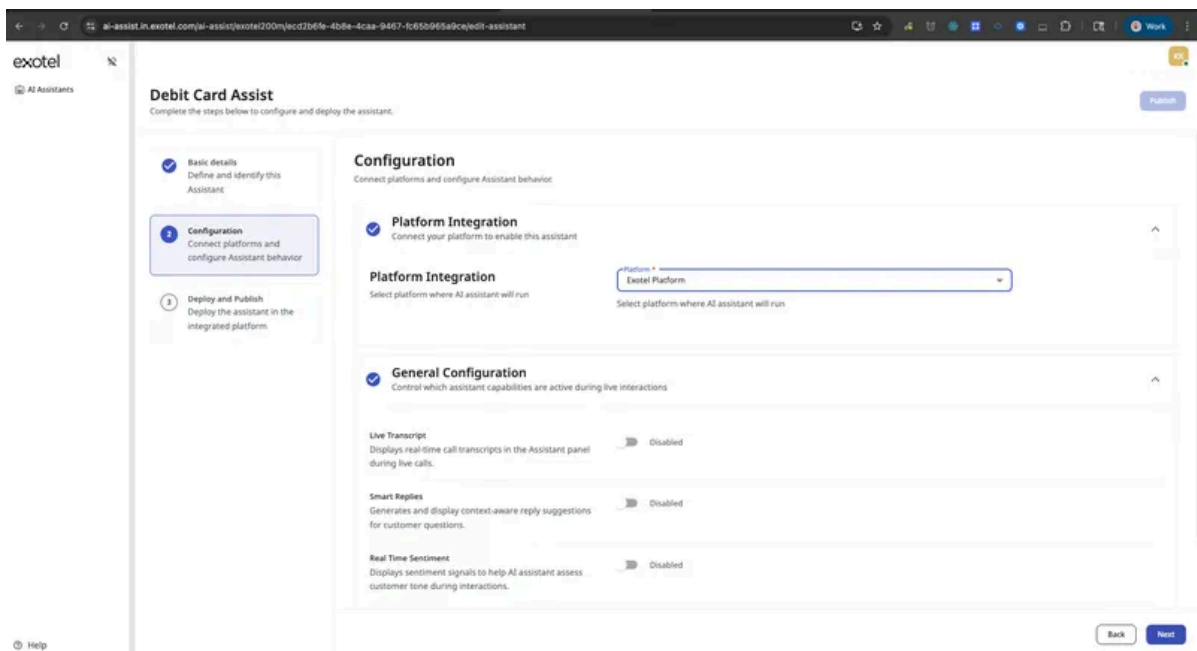
Supported Formats : doc, xlsx, pdf, txt
File size limits : (docx, pdf) - up to 50 MB
& (txt) - up to 10 MB

Save Draft Next

4.2. Set Configurations

What to do

1. Platform Integration - Select "**Exotel Platform**" to run Assistant.



2. General Configuration -

1. Enable/Disable Live transcript for Voice Interactions

- **What happens after this step**

- Agents see live captions **only during voice calls**.

■ **Note:** Transcript display applies **only** when **Voice** is the active channel.

2. Enable/Disable Smart replies

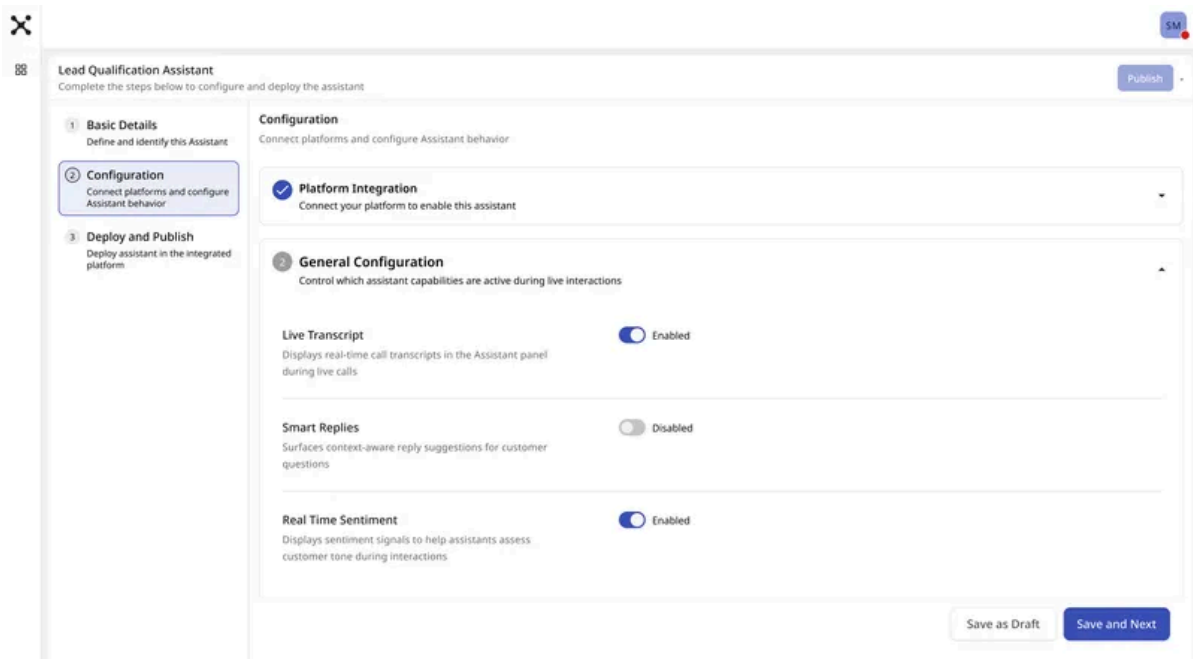
- **What happens after this step**

- Relevant Smart replies appear in real time for the selected channel.

3. Enable/Disable Real time customer sentiment

- **What happens after this step**

- Agent see live sentiment of the customer during the interaction.



4. Click on Next to proceed for deployment.



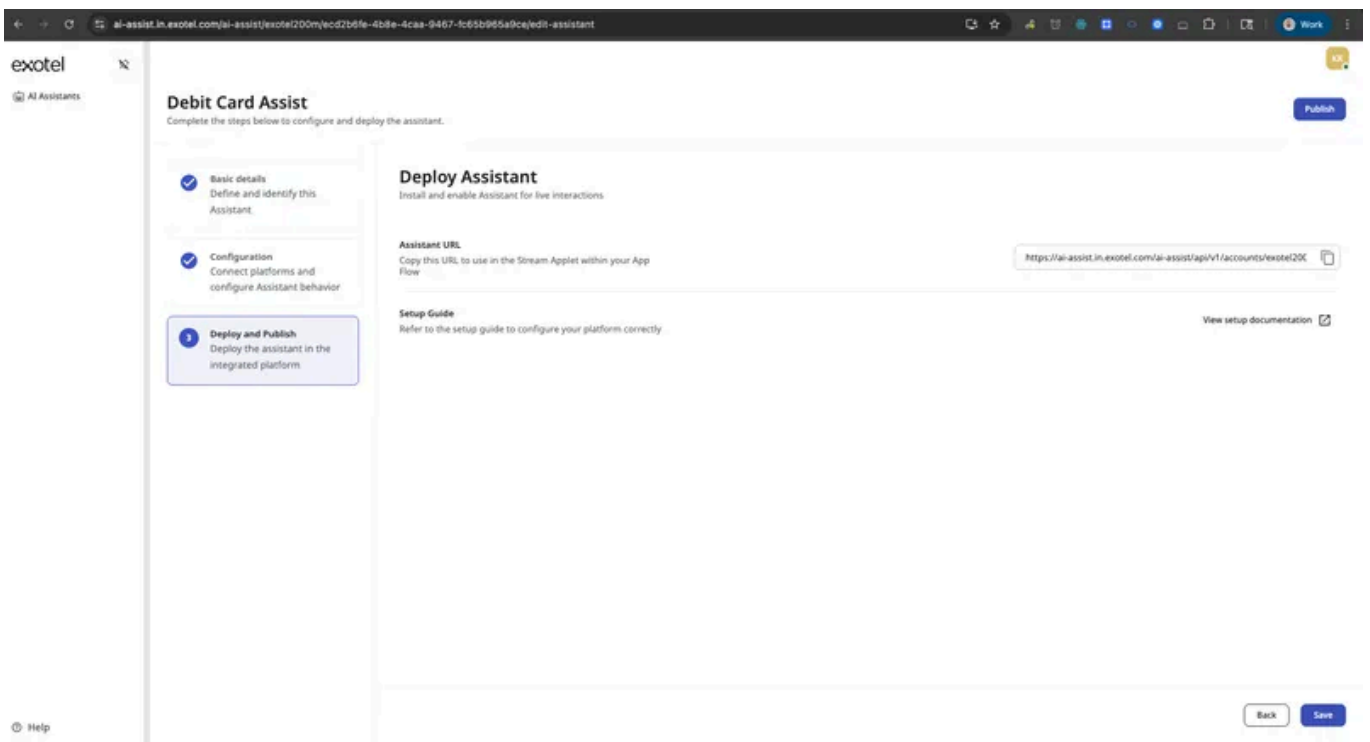
Step 5: Deploying AI Assist Application

Copy the Assistant URL

Once your assistant is configured, copy the generated **Assistant URL**.

1. Publish the Assistant

Click on **Publish** to make the assistant live and ready for deployment.



NOTE: Enable AI Assist for Calls

Publishing the assistant alone is **not sufficient** to activate it for live calls. To enable AI Assist during calls, you must configure an **App Flow** (App Bazaar) in the Exotel platform:

- Create or update your **App Flow** (App Bazaar)
- Add a **Stream Applet**
- Paste the **Assistant URL** into the stream applet configuration

What This Enables

Once configured, the system will start streaming call audio to AI Assist, enabling:

- **Real-time transcription**
- **Smart reply suggestions**
- **Live sentiment analysis**

This is the core pipeline that powers Agent Assist capabilities during active calls .

Next Step

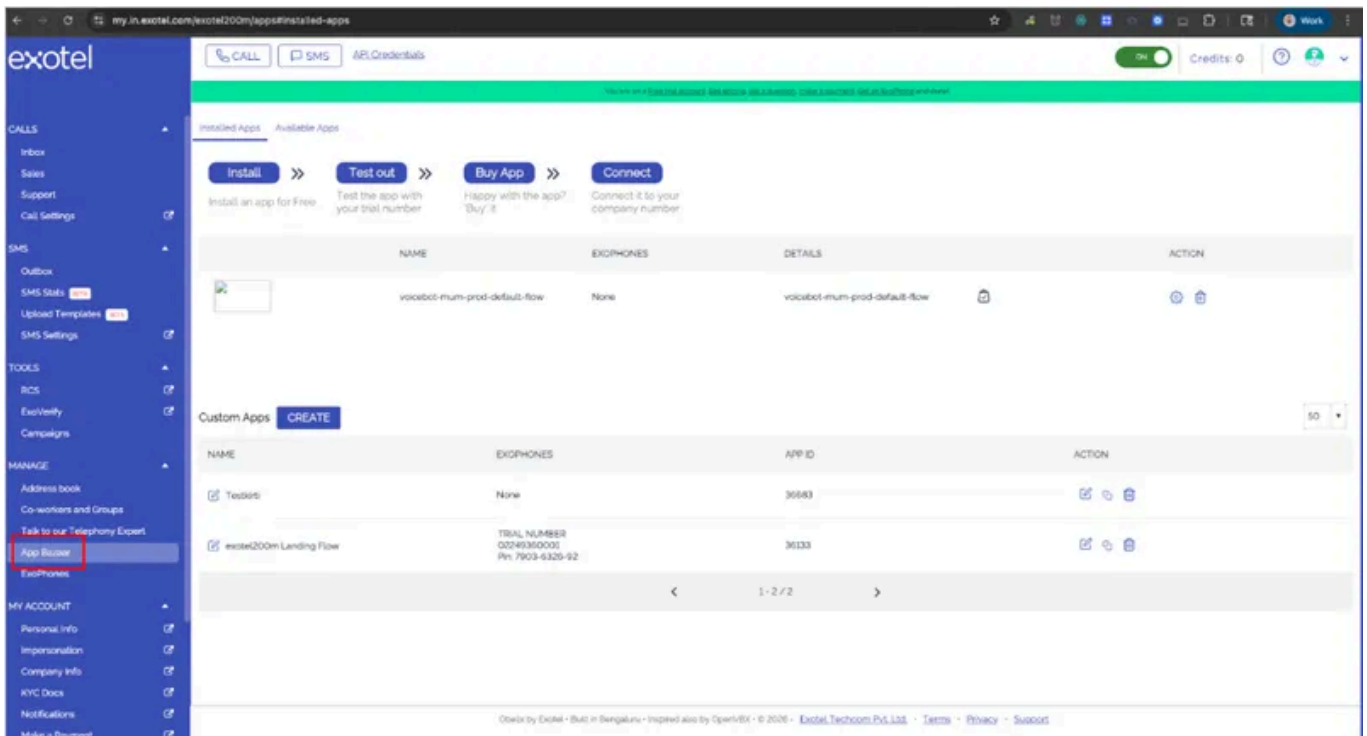
Follow the steps below to complete the AI Assist flow setup.

Step 6: Configure the App Flow (App Bazaar) for AI Assistant

This is the **critical activation step**. AI Assist only works when the Stream Applet in your Exophone flow contains the valid Assistant URL.

6.1. Access Exotel App Flow Builder (App Bazaar)

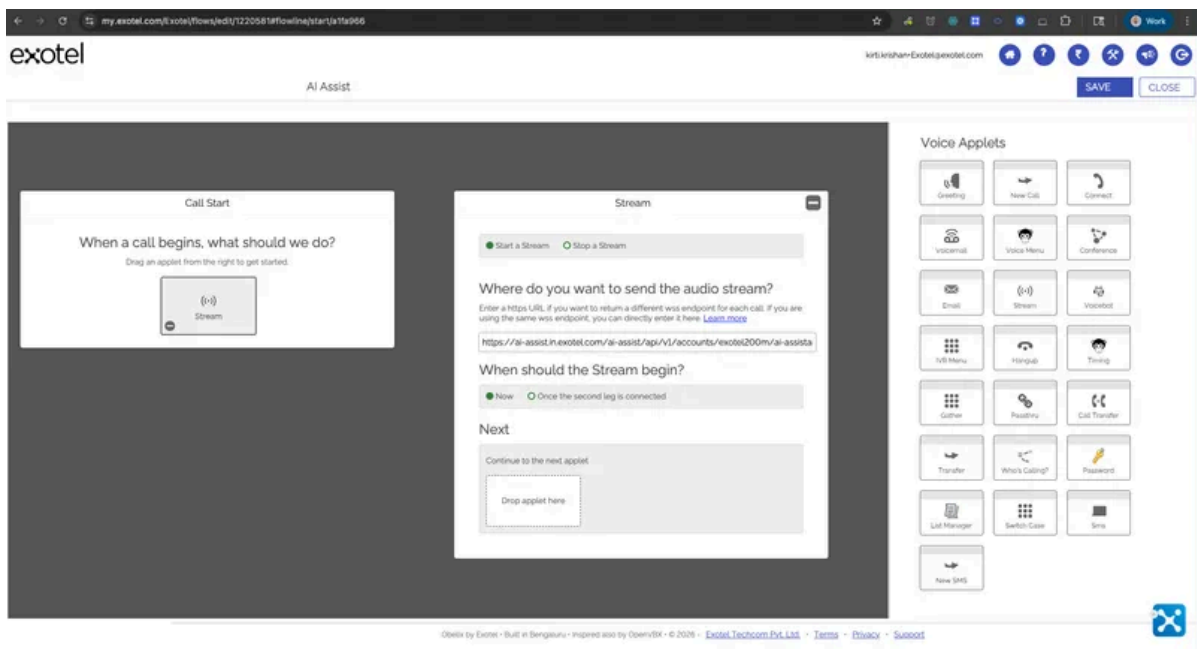
1. Log in to **Exotel Platform**
2. Navigate to **App Bazaar**



3. Select an existing flow or create a new one
4. Click **Edit** to open the **App Bazaar Editor**

6.2. Add the Stream Applet

1. In the flow editor, locate the **Applets** panel
2. Search for or scroll to find **Stream Applet**
3. Drag the **Stream Applet** into your flow
 - o Placement: Before the call connects to an agent
 - o You can see in the image,

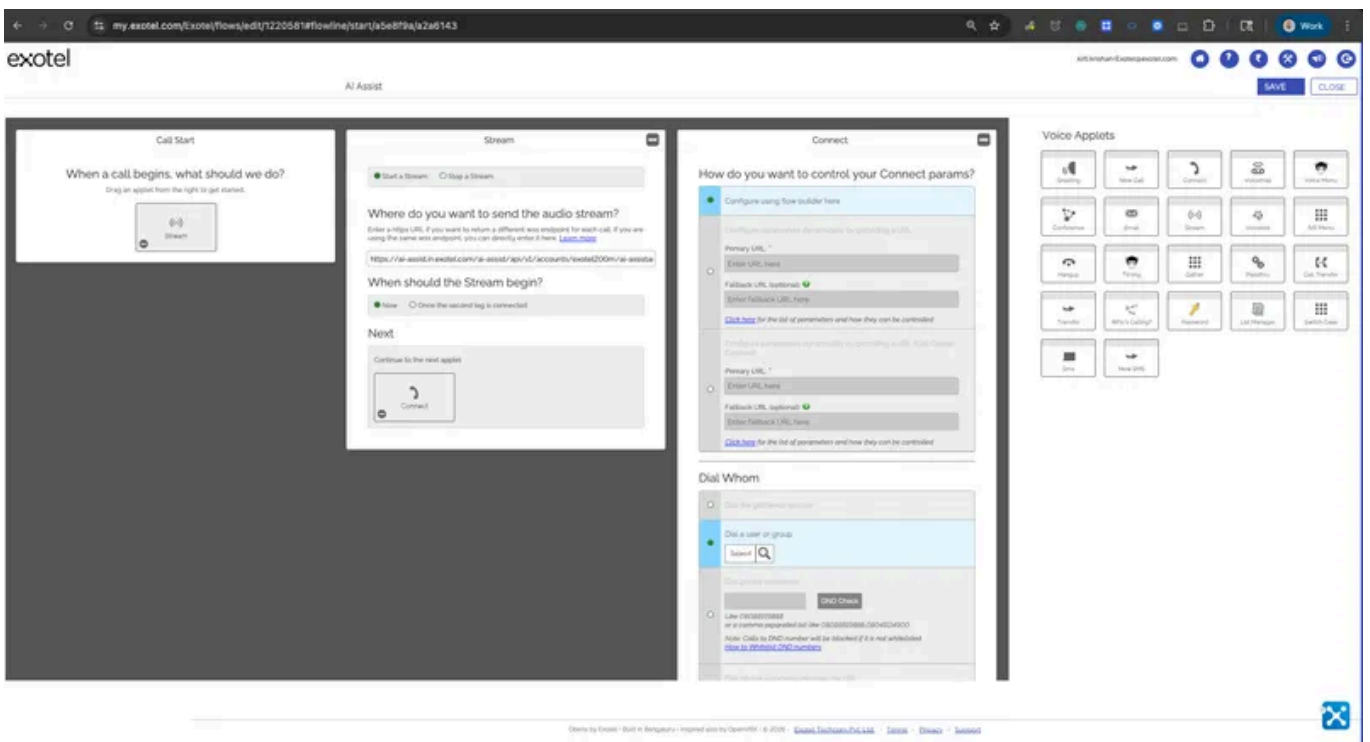


- You need to click on "Start a Stream",
- Paste the "copied Assistant URL" in Where do you want to send the audio stream? option
- Select "NOW" in When should the Stream begin? option.

4. **Using AI Assist with a Specific Exophone**, If you want to enable AI Assist directly for a specific Exophone:

- Drag and add a **Connect Applet** to your App Flow
- Configure the **dial settings** as required (Exophone, destination number, etc.)

This allows you to trigger AI Assist for calls made through that specific Exophone configuration.



5. Using AI Assist in Your Existing App Flows, To enable AI Assist within your current call flows, follow these steps:

1. Create or Open an App Flow

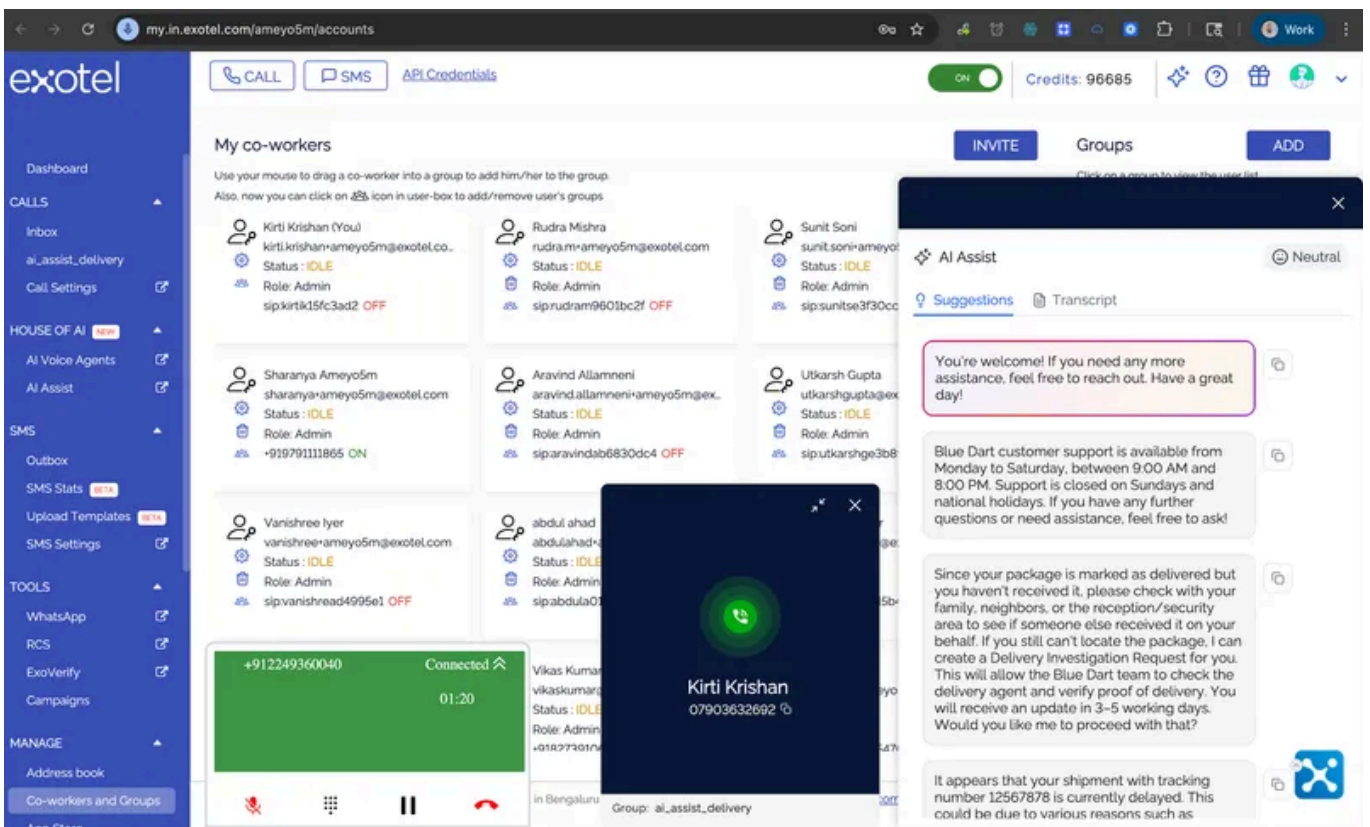
1. Go to the Exotel platform
2. Create a **new App Flow** or open an existing one where you want to enable AI Assist

2. Add a Stream Applet

1. Insert a **Stream Applet** into the flow
2. Paste the **Assistant URL** (copied earlier) into the configuration. This step enables real-time audio streaming to AI Assist.

3. Add a Transfer Applet

1. Add a **Transfer Applet** after the stream step
2. Select the **target app flow** (typically your agent-handling or voicebot flow). This ensures the call continues while AI Assist runs in parallel.



1. What happens when a call connects?

When a call is connected, it is routed through the flow containing the Stream Applet with a valid Assistant URL:

1. **Call connects** → Agent sees the call on the dashboard
2. **Call state becomes ACTIVE** → Automatic actions trigger:
 - Stream Applet forks agent-customer audio
 - WebSocket streaming session opens
 - **Assist Panel auto-expands** on the agent's screen (right side)
 - Real-time transcript begins streaming
 - Smart replies suggestions appear
 - Sentiment indicator updates

3. Assist Panel Features

The Assist Panel provides three main sections:

3.1. Live Transcript - Real-time word-for-word transcription of the conversation

3.2. Smart Replies -

- AI-generated suggested responses appear in real-time
- Based on customer query and knowledge base

3.3. Real-time Sentiment

- Visual indicator of customer mood/sentiment
- Updates periodically during call
- Helps agent gauge customer satisfaction in real-time
- Color-coded: Green (Positive) → Yellow (Neutral) → Red (Negative)

4. Manual Control of Assist Panel

1. Auto-Expand on Call

1. When call state changes to ACTIVE, panel auto-expands
2. This is automatic and requires no agent action

2. Manual Toggle

1. **Button Location:** Top-right corner of the call screen
2. **Click to Open:** Opens/closes the Assist Panel if minimized or closed
3. **Minimize:** Click the minimize icon to reduce panel to save screen space

5. Ai Assist in Outbound Calls

1. Initiate the Call

- Click on the **Call** button
- Select the **App Flow configured with AI Assist**
- Click **Call** to start the outbound interaction

2. AI Assist Activation

- Once the call is connected, the **AI Assist Panel** will automatically appear on the dashboard

my.exotel.com/Exotel/callindex

CALL SMS TRANSFER **API Credentials** on Balance: 1333.888 Validity: Dec 13, 2020

exotel

Dashboard

CALLS

- Inbox
- Call Analytics
- Call Settings

HOUSE OF AI

- AI Voice Agents
- AI Assist

SMS

- Outbox
- Upload Templates
- SMS Analytics
- SMS Settings

TOOLS

- WhatsApp
- RCS
- ExoVerify
- Campaigns

MANAGE

- Address book
- Co-workers and Groups
- App Bazaar
- ExoPhones
- Import/Export App

MY ACCOUNT

- Personal Info

Make a call

Refresh

FROM:

CALL

Advanced -

Through: AI Assist

From: 08047109797

SEARCH: Search a number, name, or call sid

FROM	TO	TYPE	FLOW	TIME	OUTCOME	CALL DURATION
Utkesh I				3952	6 mins ago	Client unanswered
vaishna				3958	7 mins ago	Call was successful
vaishna				3958	9 mins ago	Call was successful
Jonali Talukdar	KARTIK	Outgoing		0807189997	12 mins ago	Client unanswered
0953873769	VS	Incoming	Vaishnavi Main_Flow		15 mins ago	Call was successful
0701431113	Zk	Incoming	Zuhair_First_Flow		17 mins ago	Call was successful
0701431113		Incoming	Zuhair_First_Flow		18 mins ago	No user answered
Srinath Srinath	VS	Incoming	Vaishnavi Main_Flow		21 mins ago	Call was successful
Nikhil Thomas	Harshad Gujar	Outgoing		08048630944	26 mins ago	Call was successful
Nikhil Thomas	Naveen Bhaskar Sr	Outgoing		08048630944	27 mins ago	Call was successful
09988443377		Incoming	inside sales_diviya bevinat flow		28 mins ago	Client hung-up during call
09988443377		Incoming	inside sales_diviya bevinat flow		28 mins ago	Client hung-up before connecting to any user
09999556080	NS	Incoming	Nandini Swami Flow		29 mins ago	Call was successful
08700945752	Zk	Incoming	Zuhair_First_Flow		32 mins ago	Call was successful
Baki Kumar Raj.	07908847963	Outgoing		08047183888	38 mins ago	Call was successful

6. Configure the Smart Reply Language

When an AI Assist assistant is active during a call, it surfaces real-time Smart Replies - contextual reply suggestions that help agents respond faster and more consistently.

By default, Smart Replies are generated in English. The Language setting in General Configuration lets you change the language in which those suggestions are generated, without affecting any other part of the call experience.

i How this works in practice

If a customer speaks in **Hindi**, the **live transcript** will appear in Hindi (driven by the speech recognition engine). If you have configured the Language setting to **Japanese**, the **Smart Replies** will be generated in Japanese – regardless of the spoken language on the call.

Transcript vs. Smart Reply - What's the difference?

	Live Transcript	Smart Replies
Language source	Spoken language of the caller (ASR detection)	Your Language configuration setting
Configurable?	No – always follows what the caller says	Yes – set it in General Configuration
Example	Caller speaks Hindi → transcript in Hindi	Language set to Japanese → Smart Replies in Japanese

Before you begin

Make sure the following are in place before configuring the Language setting.

Field / Setting	Description	Default
Role required	Tenant Admin or Campaign Manager (with configuration access granted)	<i>Tenant Admin</i>
Assistant status	An assistant must already exist. You can create one from the AI Assist home page.	N/A
When change applies	Language changes apply to new sessions only. Active calls continue using the previously loaded setting.	N/A

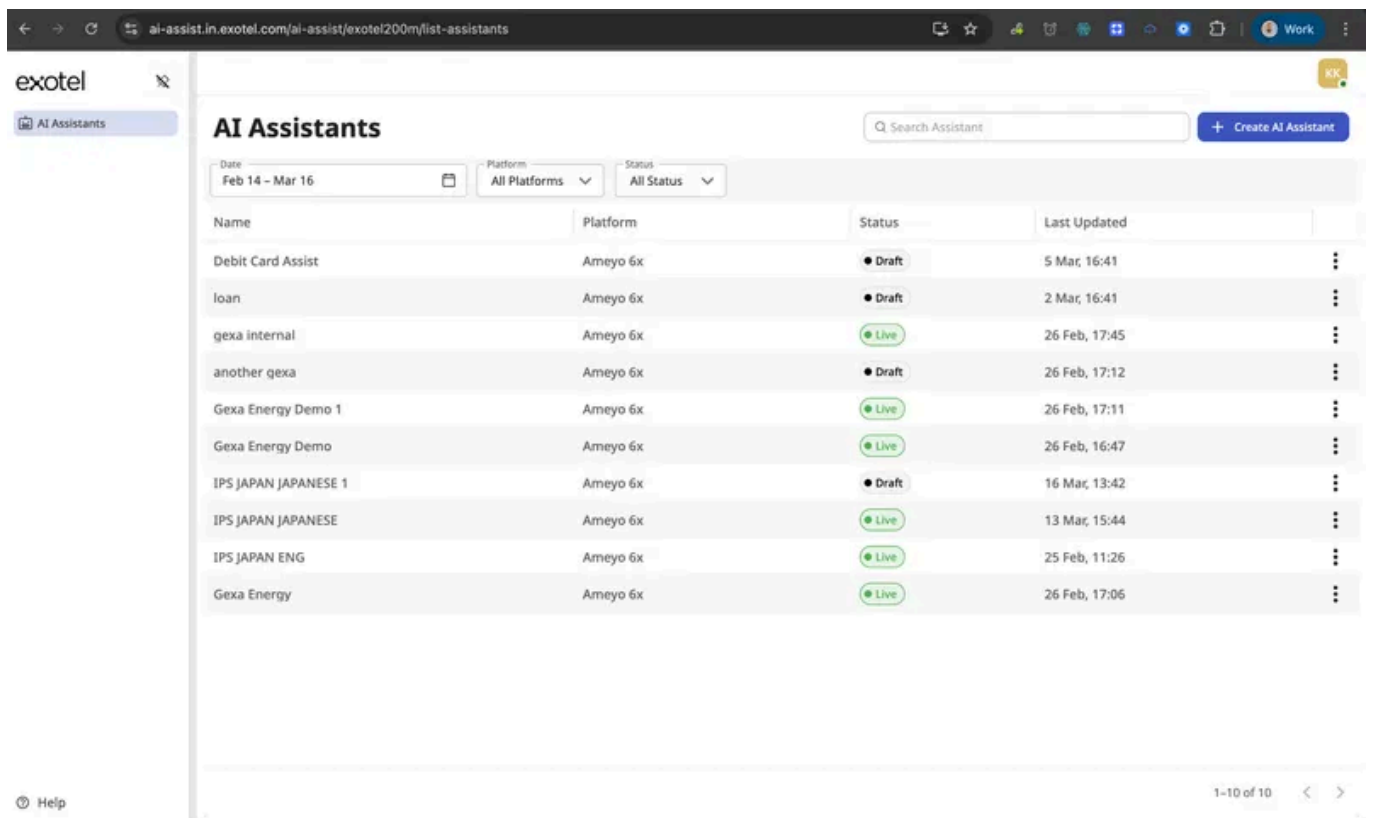
How to configure the Smart Reply language

Follow the steps below to set or update the language for Smart Replies on an assistant.

When creating a new assistant

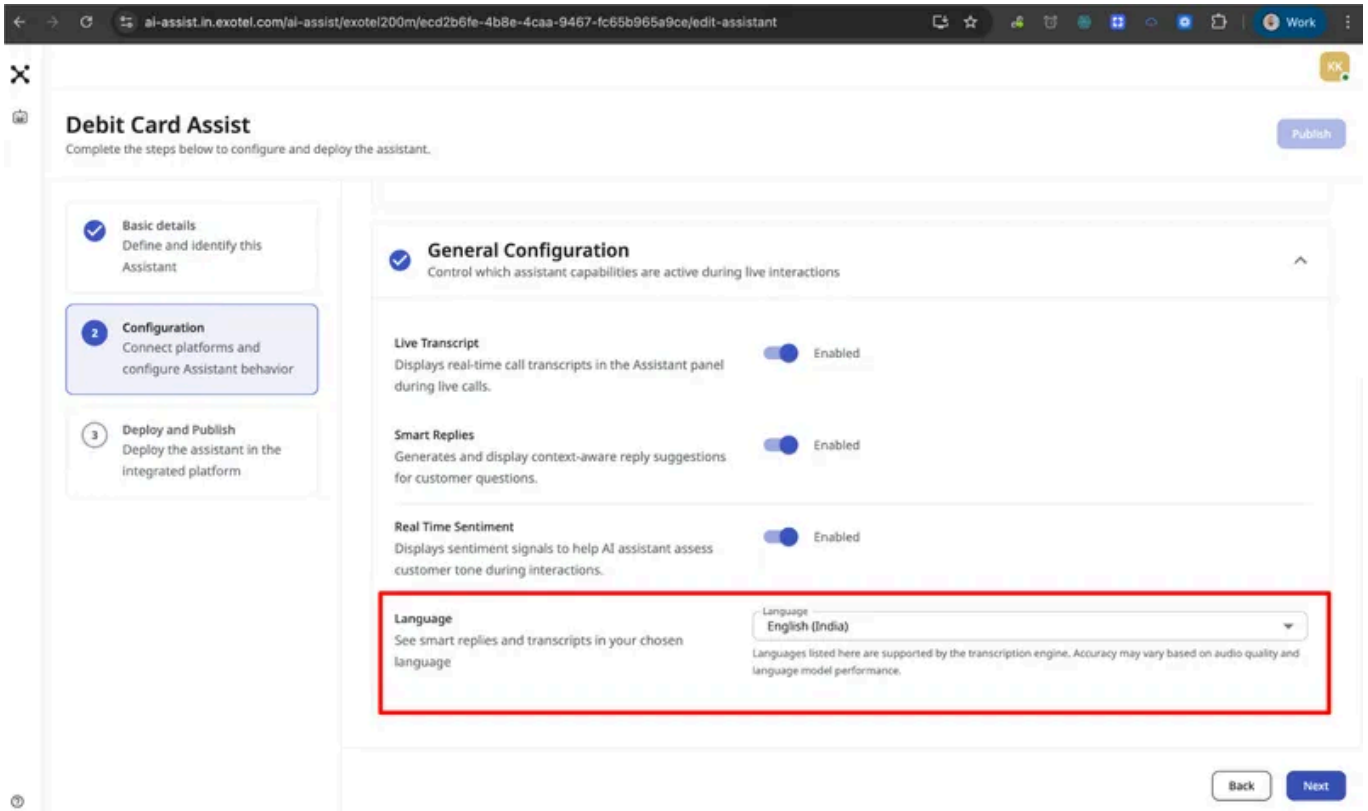
The Language field is available in **Step 2 (Configuration)** of the assistant creation flow.

1. Open the AI Assist portal: <http://ai-assist.in.exotel.com/>



1. Click **Create Assistant** and complete Step 1 (Basic details).

2. On Step 2 (Configuration), scroll down to the **General Configuration** section.
3. Locate the **Language** field. Click the dropdown and select your preferred language. You can type to search within the list.



Language accuracy note

The dropdown displays all languages supported by the transcription engine. Smart Reply quality may vary based on audio quality and language model performance for your chosen language.

1. Click **Next** to continue to Step 3 (Deploy and Publish).

When editing an existing assistant

1. Open the AI Assist portal: <http://ai-assist.in.exotel.com/>
2. Locate the assistant and click **Edit**.

Name	Platform	Status	Last Updated
Debit Card Assist	Ameyo 6x	Draft	5 Mar, 16:41
loan	Ameyo 6x	Draft	2 Mar, 16:41
gexa internal	Ameyo 6x	Live	26 Feb, 17:45
another gexa	Ameyo 6x	Draft	26 Feb, 17:12
Gexa Energy Demo 1	Ameyo 6x	Live	26 Feb, 17:11
Gexa Energy Demo	Ameyo 6x	Live	26 Feb, 16:47
IPS JAPAN JAPANESE 1	Ameyo 6x	Draft	16 Mar, 13:42
IPS JAPAN JAPANESE	Ameyo 6x	Live	13 Mar, 15:44
IPS JAPAN ENG	Ameyo 6x	Live	25 Feb, 11:26
Gexa Energy	Ameyo 6x	Live	26 Feb, 17:06

1. In the left-hand sidebar, click **Configuration** (Step 2).
2. Scroll down to the **General Configuration** section and expand it if collapsed.
3. Click the **Language** dropdown and select your preferred language.

Debit Card Assist
Complete the steps below to configure and deploy the assistant.

Configuration
Connect platforms and configure Assistant behavior

General Configuration
Control which assistant capabilities are active during live interactions

- Live Transcript**: Enabled. Displays real-time call transcripts in the Assistant panel during live calls.
- Smart Replies**: Enabled. Generates and display context-aware reply suggestions for customer questions.
- Real Time Sentiment**: Enabled. Displays sentiment signals to help AI assistant assess customer tone during interactions.
- Language**: English (India). See smart replies and transcripts in your chosen language. Languages listed here are supported by the transcription engine. Accuracy may vary based on audio quality and language model performance.

Publish

Back Next

1. Click **Publish**.

⚠ **Re-publish required**

Saving your configuration does not automatically update the live assistant. You must re-publish the assistant for the new language setting to take effect on new calls. See [Re-publish an assistant for instructions](#).

Understanding the behaviour

Smart Replies and transcripts are independent

The Language setting controls only the output language for Smart Replies. The live transcript is always in the language spoken by the caller, as detected by the speech recognition engine.

This means your agents can receive transcripts and Smart Replies in different languages simultaneously, which is useful in cross-language support scenarios.

Changes take effect on new sessions only

If you update the Language setting while an active call is in progress, the running session is not affected. The new language will apply to all sessions that start after the assistant is re-published.

What happens if no language is configured?

If the Language field has not been set (for example, on a newly created assistant), the system defaults to English. This also applies if the assistant configuration is loaded and the language value is missing or unrecognised.

Language availability

The language list is sourced from the Azure transcription engine's catalogue of supported languages. As Azure adds or retires language support, the dropdown will reflect those changes. The note beneath the dropdown in the UI reads:

"Languages listed here are supported by the transcription engine. Accuracy may vary based on audio quality and language model performance."

Frequently asked questions

Q: Does changing the language affect the live transcript?

No. The transcript always reflects the language spoken by the caller, as detected by the speech recognition engine. The Language setting only controls the language of Smart Reply suggestions.

Q: Can I set different languages for different campaigns or assistants?

Yes. The Language setting is configured per assistant. You can create separate assistants for different language requirements and deploy them to the relevant campaigns.

Q: What happens if the caller's spoken language is different from the configured Smart Reply language?

This is supported and expected. For example, if a caller speaks Hindi and the Language is set to Japanese, the transcript appears in Hindi while Smart Replies are generated in Japanese. The two are independent.

Q: Will changing the language affect calls that are already in progress?

No. Language changes apply only to new sessions that start after you re-publish the assistant. Active calls will continue using the previously configured language.

Q: Why is my preferred language not listed in the dropdown?

The dropdown shows languages supported by the Azure transcription engine. If a language is not listed, it is not currently supported by the transcription service. Contact Exotel support if you need guidance on a specific language.

Q: Can agents override the language setting during a call?

No. The Language setting is an assistant-level configuration. Individual agents cannot override it on a per-call basis.

Q: The Smart Replies look lower quality in my selected language. What should I do?

Smart Reply accuracy can vary by language, depending on audio quality and language model performance. This is noted in the UI. If quality is consistently poor for a specific language, contact Exotel support with example transcripts.

7. Enable Auto Disposition Recommendation and AI Disposition Notes in AI Assist

AI Assist can help your agents finish wrap-up faster by automatically recommending a disposition and writing the disposition note for them at the end of every voice call. This guide shows you exactly how to turn it on for any AI Assistant you have already created, what it looks like for your agents, and the few conditions you need to be aware of.

Who this is for

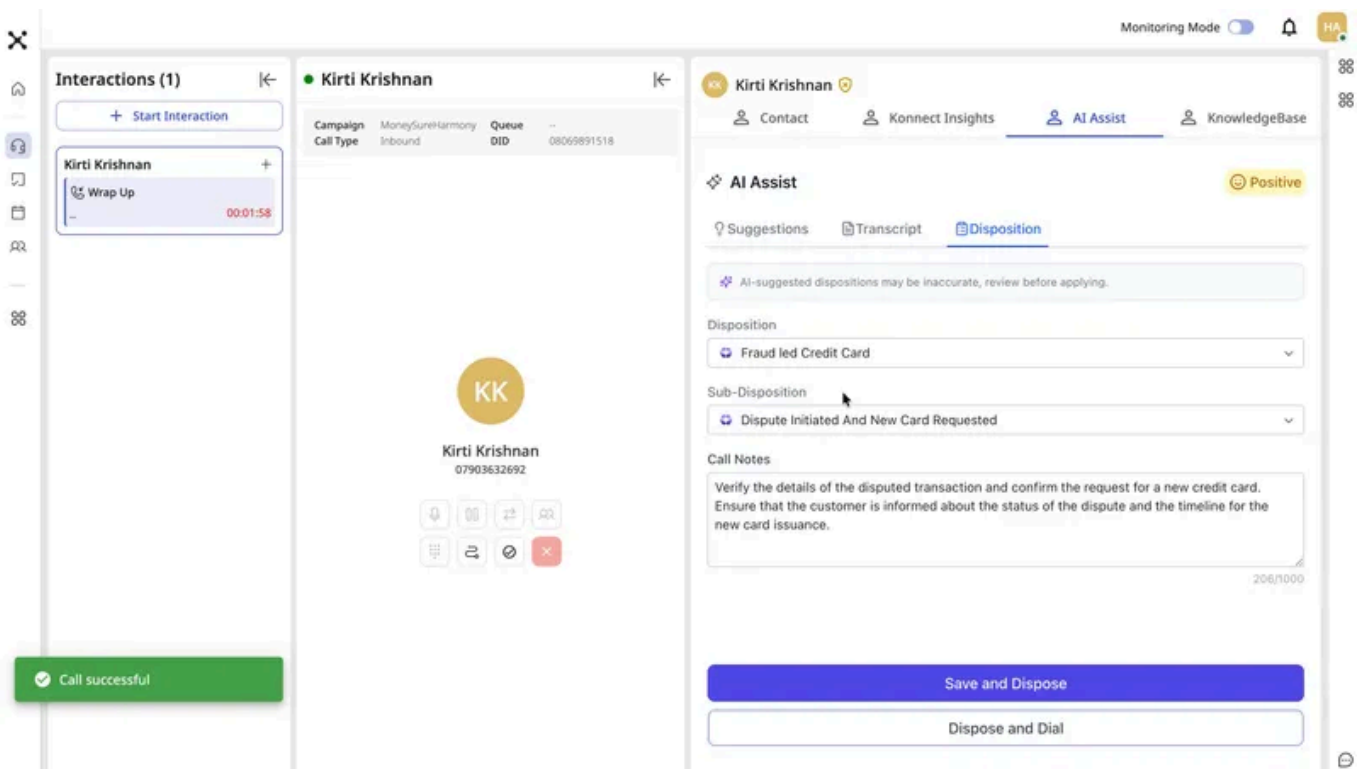
This guide is for anyone who manages AI Assistants on Exotel – typically an admin or supervisor – and wants to enable AI-assisted wrap-up for their contact center agents.

What the feature does

Once you enable it, at the end of every voice call AI Assist will:

- Recommend a **Primary Disposition** (and a **Sub-Disposition**, if one is configured) from your existing disposition taxonomy.
- Generate a structured **Disposition Note** from the call transcript, covering the customer's issue, the resolution, and any next steps.

Both the recommendation and the note appear inside the AI Assist panel in the agent desktop. The agent can accept them as-is, change the disposition, or (if you allow it) edit the note before submitting wrap-up. Agents always stay in control – AI Assist never blocks them from disposing a call.



Supported platforms

This feature is available on:

- **Exotel Contact Centre (Ameyo) 6x Legs** (6x leg-based ECC deployments)
- **Exotel Contact Centre (Ameyo) 6.0**

Before you begin

Make sure the following are in place. Without these, the feature will either not show up in configuration or will silently not produce suggestions.

1. You are on Exotel Contact Centre (Ameyo) 6x Legs or Exotel Contact Centre (Ameyo) 6.0.
2. AI Assist is enabled for your account and you already have (or are creating) an AI Assistant.
3. Your disposition taxonomy (Primary dispositions, and Sub-dispositions if you use them) is already configured in Exotel Contact Centre (Ameyo) for the campaign the agents are working on. AI Assist can only recommend dispositions that already exist in your taxonomy – it will never invent new ones.
4. Agents are using the **AI Assist panel** inside the Exotel Contact Centre (Ameyo) agent desktop (embedded via the Omni SDK in Exotel Contact Centre (Ameyo) 6.0, or in the 6x

Legs agent toolbar).

5. Your AI Assistant is attached to the relevant voice flow so that calls actually stream to it.

Note on Live Transcript: You do **not** need Live Transcript to be ON. If Live Transcript is turned off, the live transcription simply isn't displayed to the agent in the AI Assist panel, but the AI will still receive the audio, generate a transcript in the background, and produce the disposition recommendation and note at the end of the call.

How to enable the feature on an AI Assistant

The screenshot shows the 'Collections' configuration page for an AI Assistant. The left sidebar has three steps: 'Basic details', 'Configuration' (selected), and 'Deploy and Publish'. The main area shows configuration options for 'Live Transcript', 'Real Time Sentiments', 'Disposition Suggestions', 'Disposition Notes', and 'Allow agents to edit Disposition Notes'. The 'Disposition' section is expanded, showing 'Disposition Suggestions', 'Disposition Notes', and 'Allow agents to edit Disposition Notes' all set to 'Enabled'. There are 'Back' and 'Next' buttons at the bottom right.

Category	Setting	Status
Live Transcript	Displays real-time call transcripts in the Assistant panel during live calls	Disabled
Real Time Sentiments	Displays sentiment signals to help assistants assess customer tone during interactions	Disabled
Disposition Suggestions	Suggests call dispositions to agents based on the conversation	Enabled
Disposition Notes	Suggest call disposition notes to agent based on conversations	Enabled
Allow agents to edit Disposition Notes	Allow agents to modify suggested notes before submitting	Enabled

Disposition configuration is done **while creating or editing an AI Assistant** – it lives inside the assistant itself, not in a separate admin area.

Step 1 – Open your AI Assistant

Log in to Exotel and go to **AI Assist** → **Assistants**. Either click **Create New Assistant** to create one from scratch, or open an existing assistant and click **Edit**.

Step 2 – Go to the Disposition section

Inside the assistant creation / edit screen, scroll to the **Disposition** section. This section is visible only when the assistant is configured for a supported platform (Exotel Contact Centre

(Ameyo) 6x Legs or 6.0) and voice channel.

Step 3 – Turn on the toggles you want

You will see the following settings:

- **Enable Disposition Recommendation** – when ON, the AI will auto-suggest a Primary Disposition (and Sub-Disposition if your taxonomy has one) at the end of every call.
- **Enable Disposition Notes Generation** – when ON, the AI will generate a structured wrap-up note from the call transcript and pre-fill it in the Notes field.
- **Allow Agent to Edit AI Notes** – ON by default. If you turn this OFF, the AI-generated note will be shown as read-only and the agent will not be able to modify it before submitting.

You can turn these on independently. Common setups:

- Both ON – fully assisted wrap-up (most common).
- Recommendation ON, Notes OFF – AI picks the disposition, agent writes notes manually.
- Recommendation OFF, Notes ON – AI writes notes, agent picks the disposition manually.

Step 4 – Save and publish the assistant

Save the assistant. Changes take effect for the next call that runs through this assistant – there is nothing additional to deploy.

Step 5 – Do a test call

Place a test voice call on a campaign that uses this assistant, let the agent end the call normally, and confirm on the wrap-up screen that the disposition is pre-selected and the notes field is pre-filled.

How it appears in the Agent Desktop

How agents access it

Agents do not need to do anything special to access the feature. It is part of the **AI Assist panel** that is already embedded in their Exotel Contact Centre (Ameyo) agent desktop:

During a live call the panel shows the usual AI Assist tabs (Live Transcript, Suggestions, etc.). The disposition recommendation and notes only appear in the disposition tab once the call has ended.

What the agent sees at wrap-up

As soon as the call ends and the interaction enters the wrap-up state:

- The **Primary Disposition** field gets auto-populated with the AI-recommended value.
- If your taxonomy has sub-dispositions, the **Sub-Disposition** is auto-populated too.
- The **Notes** field is pre-filled with a structured AI note covering Issue, Resolution, and Next Steps.
- The AI-generated content is visually marked so the agent knows it came from AI.

The agent can then:

- Accept everything and click submit.
- Change the primary or sub-disposition before submitting (AI suggestions are never locked).
- Edit the note, if "Allow Agent to Edit AI Notes" is ON.

Submission rules are unchanged: disposition remains mandatory, notes remain optional (unless your campaign already enforces notes).

8. Enabling Inbound Call Streaming for AI Assist on Ameyo 6.0

Purpose

This SOP explains how to **enable audio streaming from Ameyo to AI Assist** so that transcripts and smart replies can be surfaced to agents during voice calls.

This document **only covers streaming setup**.

It assumes that:

1. An **Assistant is already created** in AI Assist.
2. The assistant is **deployed in Ameyo CC campaigns**.
3. The **Assistant Streaming Endpoint URL** is available.

1. Platforms Supported

This SOP applies to:

Platform	Supported
Ameyo 6.0	Yes

2. AI Assist on Voice Calls

AI Assist enables **real-time transcription and smart reply suggestions** during live calls handled by agents.

This is implemented by:

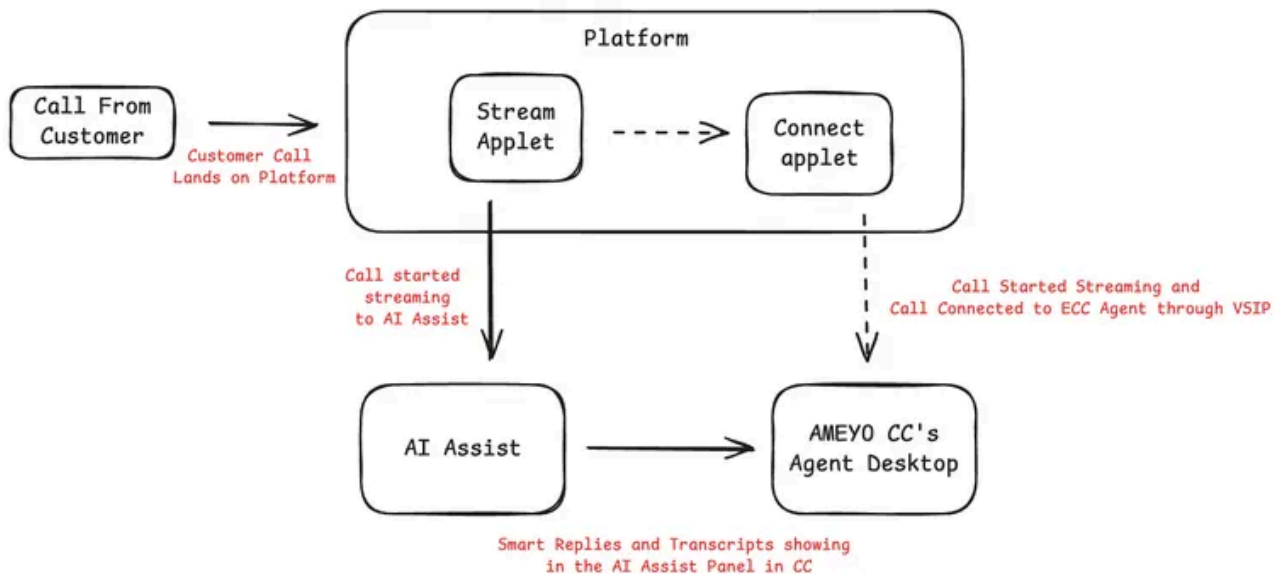
1. Streaming call audio from **Platform**
2. Sending audio to the **AI Assist Streaming Endpoint**
3. Processing audio in **Assistant Admin**
4. Delivering transcripts and smart replies to **Assistant Agent UI**

3. High Level Setup Flow

The overall process for enabling AI Assist on voice calls is:

1. Create Assistant in AI Assist
2. Deploy Assistant in Ameyo CC
 1. Help guides to create and deploying assistant in Ameyo CC :
 1. Exotel AI Assist : Userguide - AI Assist
 2. Edit, Manage, and Re-Publish an Assistant - AI Assist
 3. Deploy Configuration App in Exotel Contact Centre - AI Assist
 4. Deploy Assistant in Exotel Contact Center - AI Assist
3. Copy Assistant Streaming Endpoint
4. Configure Stream Applet in Platform
5. Test the streaming flow

4. AI Assist in Voice Calls



The diagram illustrates how AI Assist can be enabled for voice calls by streaming call audio from the Platform while simultaneously connecting the call to an agent.

1. Customer Call Lands on Platform

The process begins when a **customer places a call**, which first lands on the **Ameyo Platform**.

This is important because the **Stream Applet that enables AI Assist exists inside the platform flow.**

If the call bypasses the platform and goes directly to ECC, AI Assist streaming cannot start.

2. Stream Applet Initiates Audio Streaming

Once the call reaches the platform, the **Stream Applet** is triggered.

The Stream Applet:

- Calls the **AI Assist streaming endpoint**
- Receives a **WebSocket (WSS) URL**
- Starts **streaming the live call audio to AI Assist**

At this stage:

- The call audio is sent to **AI Assist in real time**
- AI Assist begins processing the conversation for **transcription and smart reply generation**

3. Connect Applet Routes the Call to the Agent

After streaming starts, the platform executes the **Connect Applet**.

The Connect Applet:

- Connects the customer call to **ECC**
- Uses **VSIP trunk (IP-based SIP connection)** for routing
- Delivers the call to an **available agent**

This call routing happens **independently of the AI Assist processing.**

4. AI Assist Processes the Stream

The streamed audio reaches **AI Assist**, where:

- Speech is converted into **real-time transcripts**
- **Smart reply suggestions** are generated based on the conversation

5. AI Assist Data Appears on Agent Desktop

AI Assist then sends the processed output to the **Ameyo CC Agent Desktop**.

Agents can see:

- **Live call transcripts**
- **AI-generated smart replies**

These appear inside the **AI Assist panel in the contact center UI**, assisting the agent while the conversation is ongoing.

Key Concept

The system operates with **two parallel flows**:

Call Routing Flow

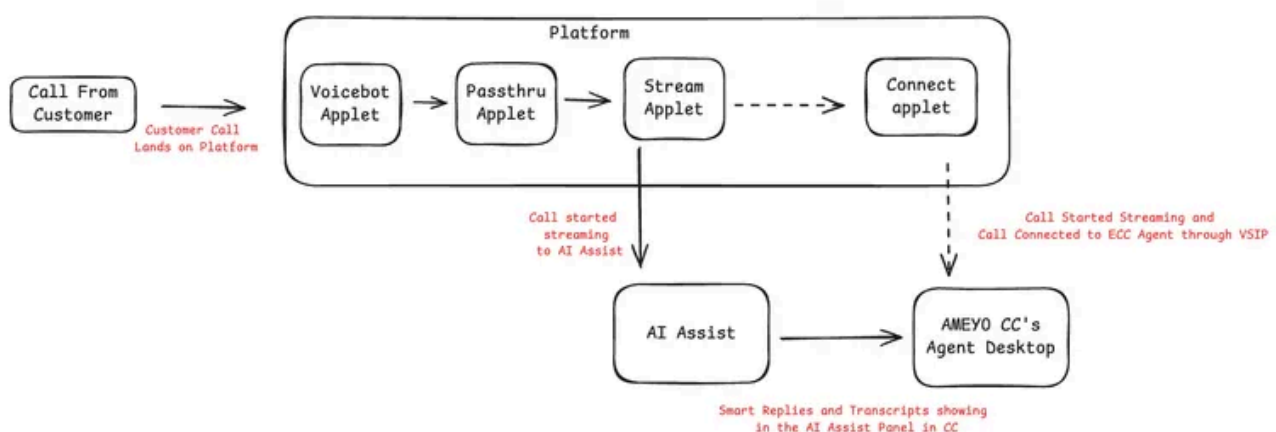
Customer → Platform → Connect Applet → ECC → Agent

AI Assist Streaming Flow

Platform → Stream Applet → AI Assist → Agent Desktop

This parallel architecture allows AI Assist to **analyze the call in real time without interfering with the actual call connection between the customer and the agent**.

5. AI Assist in Voice bot Handoff Voice Calls



This diagram shows how **AI Assist works when a Voicebot is used before the call is transferred to a live agent**. The platform processes the voicebot interaction first, then enables streaming and finally connects the call to an agent.

1. Customer Call Lands on Platform

The flow begins when a **customer places a call**, which lands on the **Platform**.

Unlike the normal flow, the call first interacts with a **Voicebot Applet** before reaching the agent.

2. Voicebot Handles the Initial Interaction

The **Voicebot Applet** processes the customer's request.

Typical responsibilities include:

- Greeting the customer
- Collecting initial information
- Handling simple queries
- Determining whether the call should be transferred to an agent

If the voicebot resolves the query, the call may end here.

If the call requires human assistance, the flow proceeds to the next step.

3. Passthru Applet Transfers the Call

When the voicebot decides to **handoff the call**, the flow moves to the **Passthru Applet**.

The Passthru Applet ensures that:

- The call moves from the **voicebot interaction flow** to the **agent-assist flow**
- The audio stream continues without interruption

This step effectively transitions the call from **automated handling to live agent support**.

4. Stream Applet Starts AI Assist Streaming

After the passthrough, the **Stream Applet** is executed.

The Stream Applet:

1. Sends a request to the **AI Assist streaming endpoint**
2. Receives a **WebSocket URL**
3. Begins **streaming the live call audio to AI Assist**

At this point, AI Assist starts processing the conversation.

5. Connect Applet Routes the Call to ECC

Once streaming begins, the platform executes the **Connect Applet**.

This applet:

- Connects the call to **ECC**
- Uses a **VSIP trunk (IP-based SIP connection)**
- Routes the call to an **available agent**

6. AI Assist Processes the Conversation

The streamed audio reaches **AI Assist**, which processes the conversation in real time.

AI Assist performs:

- **Speech-to-text transcription**
- **Context analysis**
- **Smart reply generation**

7. Smart Replies and Transcript Appear on Agent Desktop

AI Assist sends the processed information to the **Ameyo Contact Center Agent Desktop**.

The agent sees:

- **Live transcript of the customer conversation**
- **AI-generated smart replies**

These appear inside the **AI Assist panel in the contact center interface**, helping the agent respond faster and more accurately.

7. Constraint

AI Assist in these scenarios works **only when the call first lands on the Platform**.

Supported Flow

User → Platform → ECC

Not Supported

User → ECC directly

Reason:

Streaming must be initiated through the **Stream Applet in the Platform**.

Workaround

If customers use ECC DID directly:

Update **call routing** so calls first land on the **Platform DID**.

8. Configuration Steps

These steps apply to the following platforms:

- **Ameyo 4x**
- **Ameyo 6x IP Platform**

AI Assist streaming can be configured for two scenarios:

1. **Direct Voice Calls to Agent**
2. **Voicebot → Agent Handoff Calls**

Step 1 – Create AI Assist Assistant

Follow the step-by-step guide:

Exotel AI Assist : Userguide - AI Assist

1. Login to the **AI Assist Admin Portal**.
2. Create a new **Assistant**.

Enable the following capabilities:

- Transcription
- Smart Replies

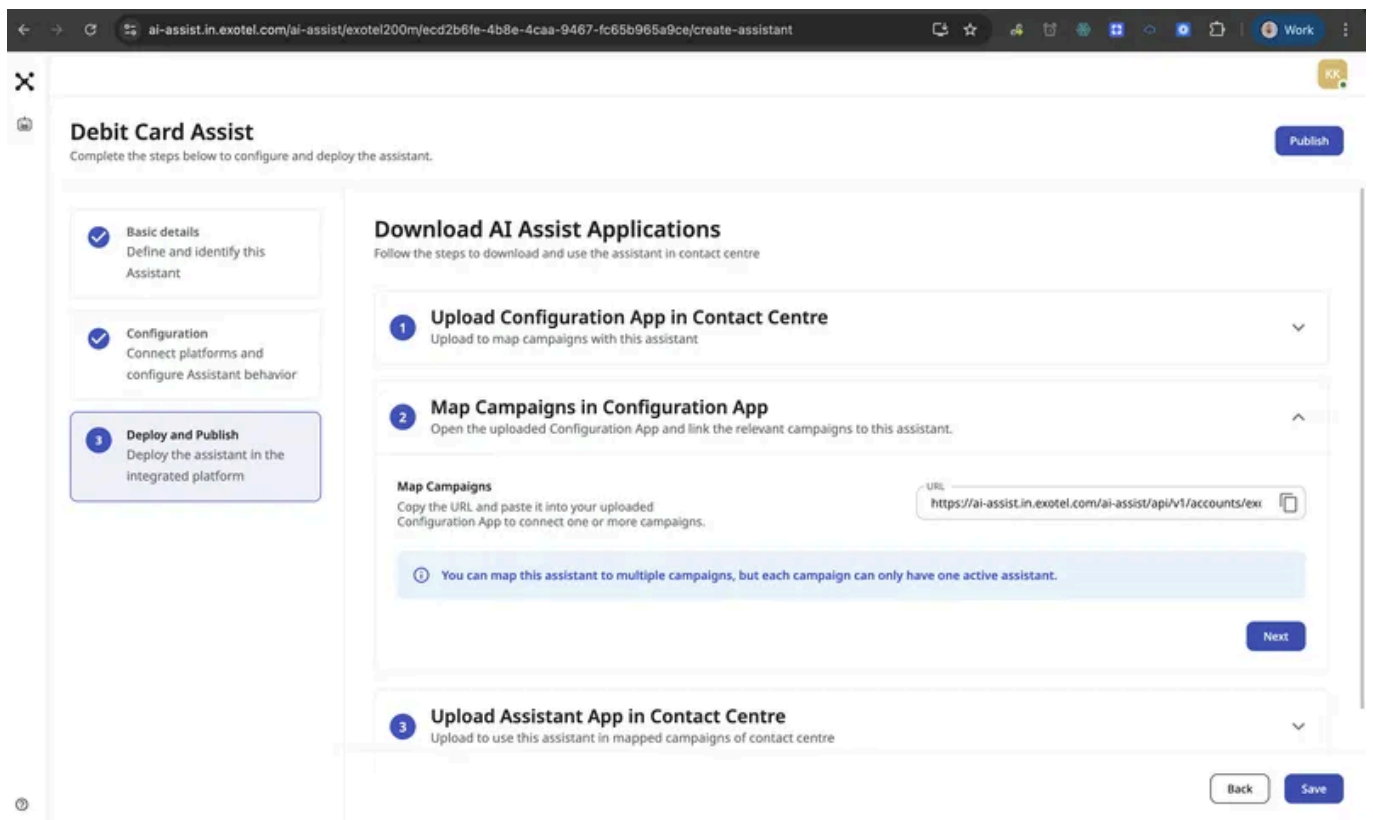
- Real Time Sentiment

After creating the assistant, copy the **Streaming Endpoint URL**.

Example:

```
https://ai-assist.in.exotel.com/ai-assist/api/v1/accounts/exotel200m/ai-assistants/ecd2b6fe-65a9ce/stream-urls
```

This endpoint will be used in the **Stream Applet configuration in the platform**.



Step 2 – Configure Call Flow in Platform

Login to the **Platform Dashboard**.

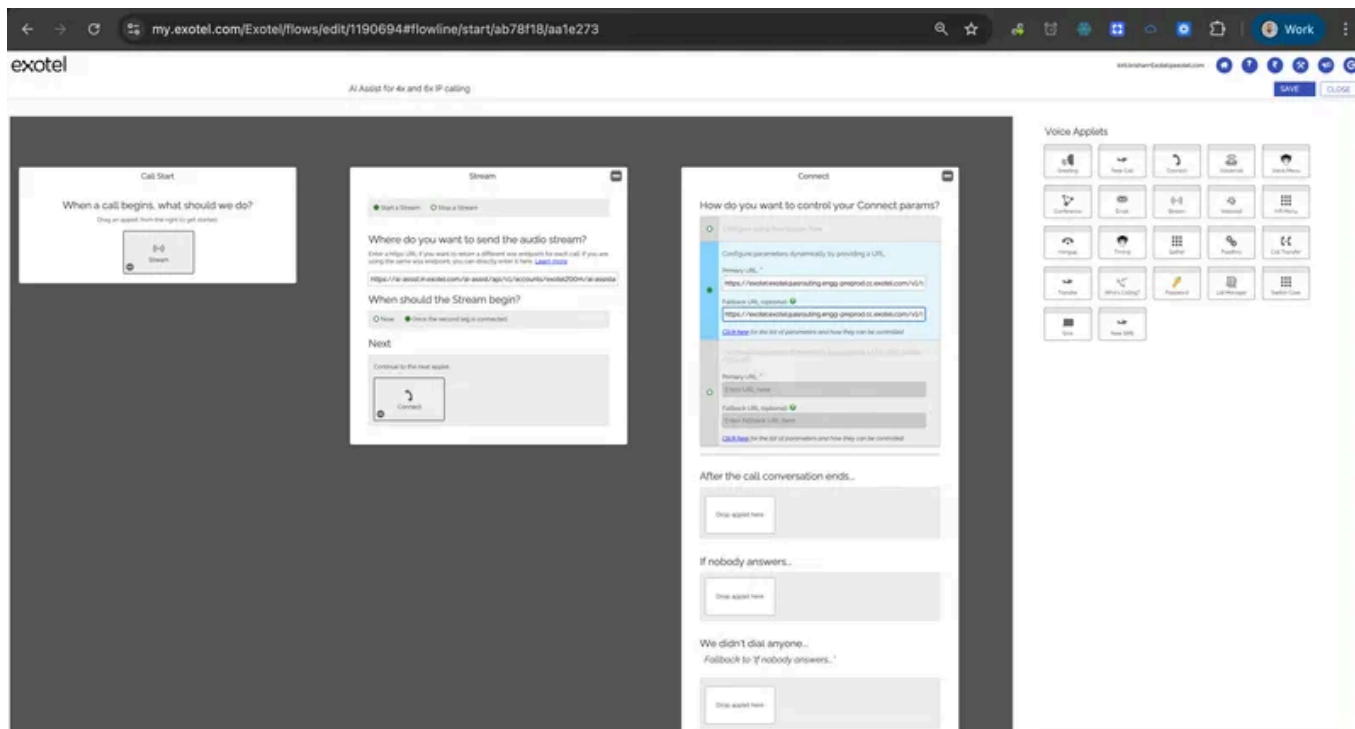
Navigate to:

```
Platform Console → Call Flows → Applets
```

From here, configure the applets based on the **call scenario**.

Scenario 1 – Voice Calls (Direct to Agent)

In this scenario, the **customer call directly connects to an agent**, while the platform streams the call audio to AI Assist.



Step 3 – Create Stream Applet

Create a **Stream Applet** and configure the following:

Streaming Endpoint

Set the HTTP endpoint to the **AI Assist Streaming Endpoint**.

Example:

```
https://ai-assist.in.exotel.com/ai-assist/api/v1/accounts/exotel1200m/ai-assistants/ecd2b6fe-65a9ce/stream-urls
```

Streaming Mode

Enable the option:

```
Stream only when second leg connected
```

Meaning:

Streaming begins **only when the agent answers the call**.

This prevents unnecessary streaming before the call connects.

Runtime Flow

When the Stream Applet executes:

Stream Applet

|



HTTP request → AI Assist

|



Receive WebSocket URL

|



Start Audio Streaming

Step 4 – Create Connect Applet

Add a **Connect Applet** immediately after the **Stream Applet**.

Configure:

Destination: ECC

Transport: VSIP Trunk

Final Call Flow (Direct Voice Calls)

Customer Call

|



Platform

|



Stream Applet

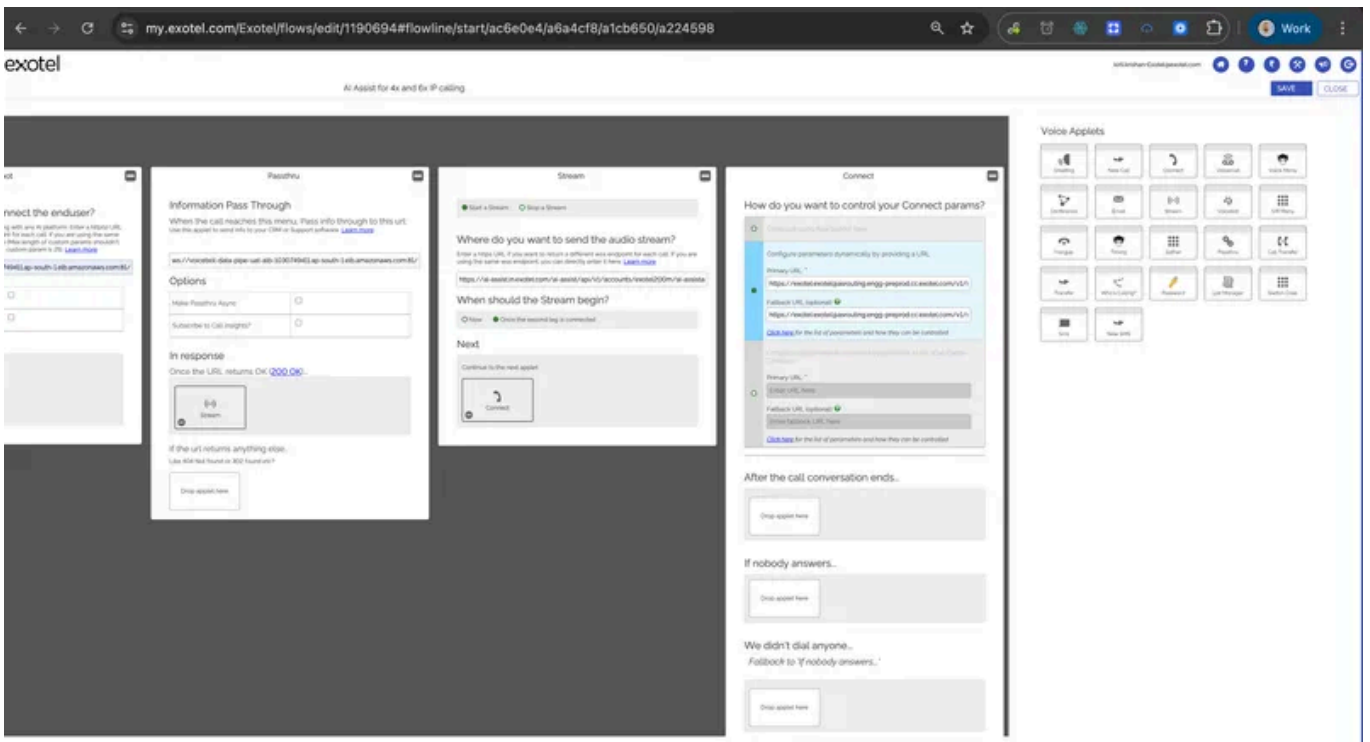
|

|———▶ AI Assist (audio streaming)

|



Connect Applet



Step 3 – Configure Voicebot Flow

Create the following applet sequence inside the platform:

Voicebot Applet



Passthru Applet



Stream Applet



Connect Applet

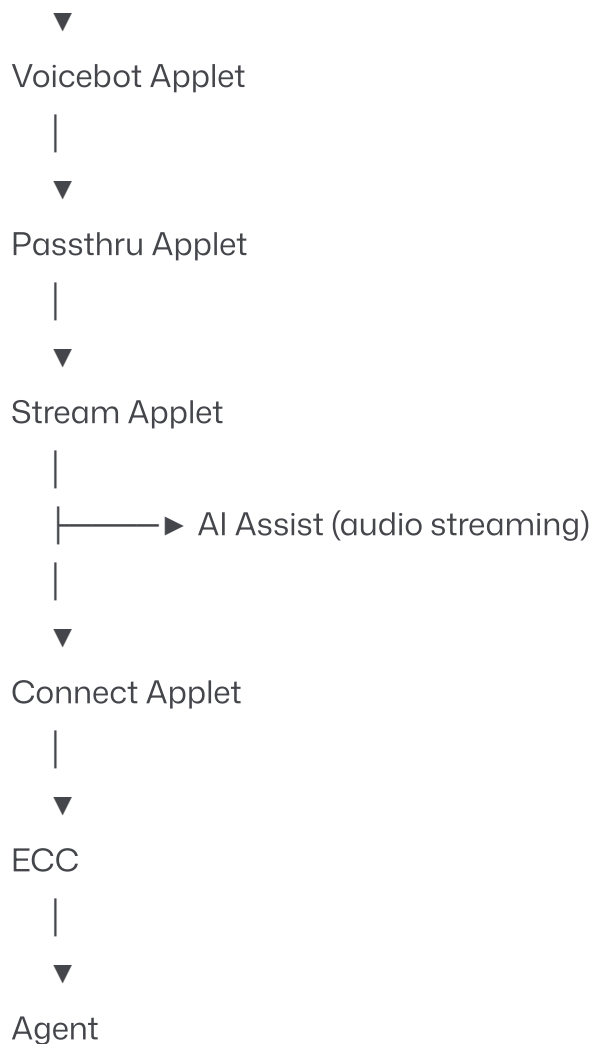
Voicebot Handoff Flow

Customer Call



Platform





Why Passthru is Required

The **Passthru Applet** allows the call to move from the **voicebot flow to the agent assist flow** without interrupting the call session.

Streaming then begins once the call transitions to the agent.

10. Validation Checklist

Before enabling production traffic, verify the following.

Platform

- ✓ Stream Applet created
- ✓ Correct AI Assist HTTP endpoint configured
- ✓ "Second leg connected" streaming enabled

AI Assist

- ✓ Assistant created
- ✓ Streaming endpoint reachable
- ✓ Transcription enabled
- ✓ Smart replies enabled

ECC

- ✓ VSIP trunk active
- ✓ Call routing to agent working

Agent UI

- ✓ WebSocket connection established
- ✓ Live transcript visible
- ✓ Smart replies appearing in the AI Assist panel

9. AI Assist Configuration Options

Configuring Your AI Assistant

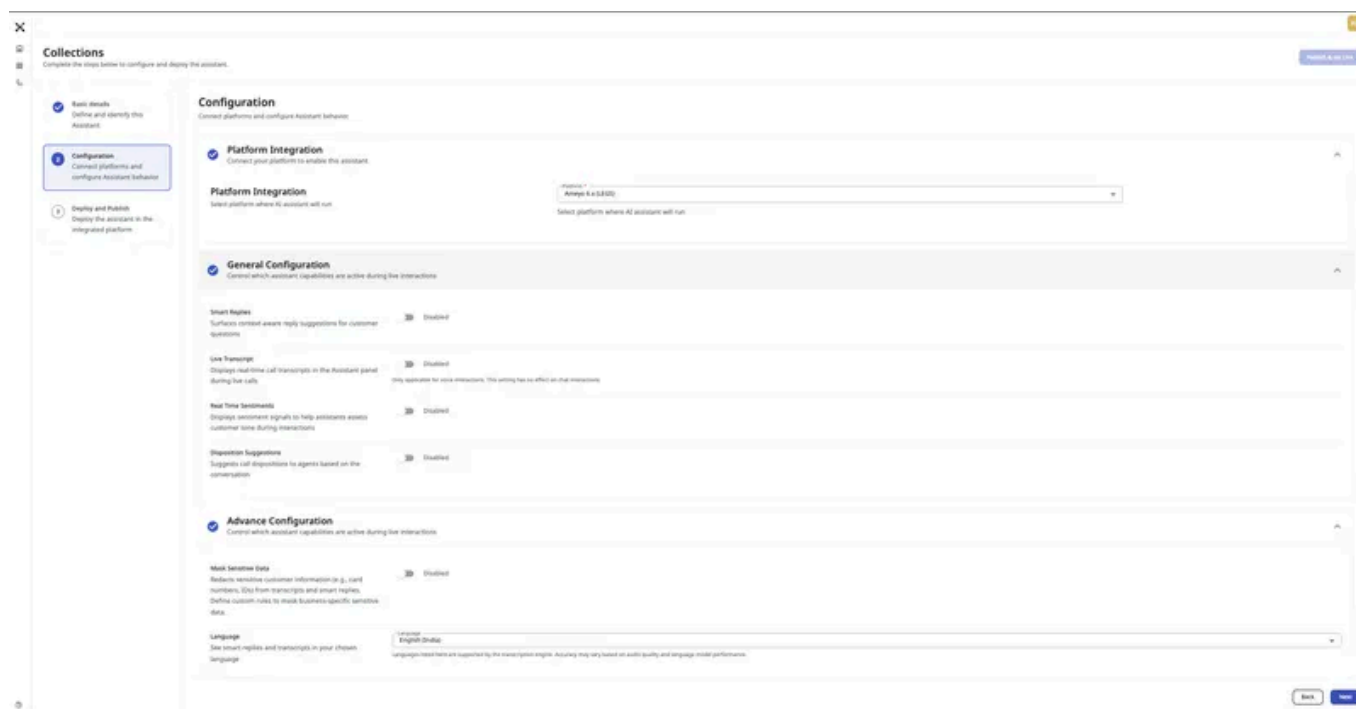
Applies to: Admins setting up or editing an AI Assistant

Section: Create/Edit Flow → Step 2: Configuration

Overview

The Configuration step is where you control how your AI Assistant behaves during live interactions. It is divided into three sections: Platform Integration, General Configuration, and Advanced Configuration. You can expand or collapse each section using the chevron on the right of the section header.

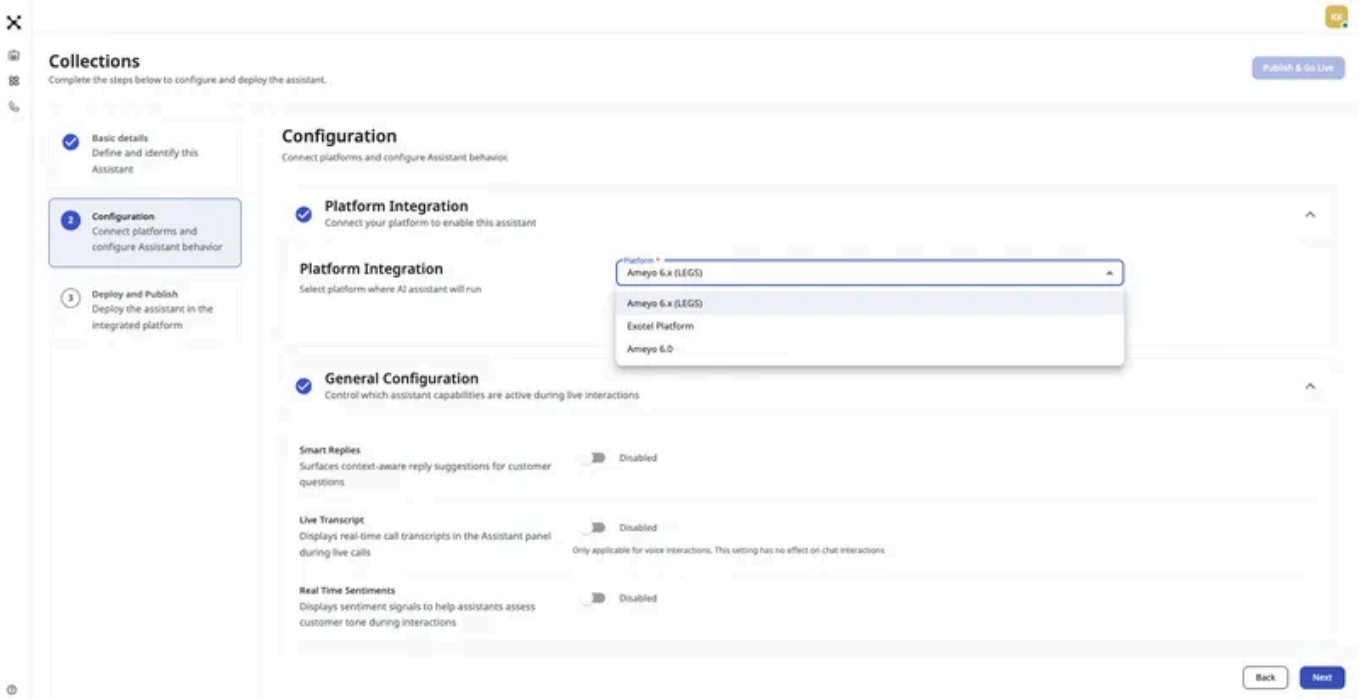
Your changes are not applied until you click **Save and Next** or **Publish**. You can save a draft at any time without affecting a live assistant.



Platform Integration

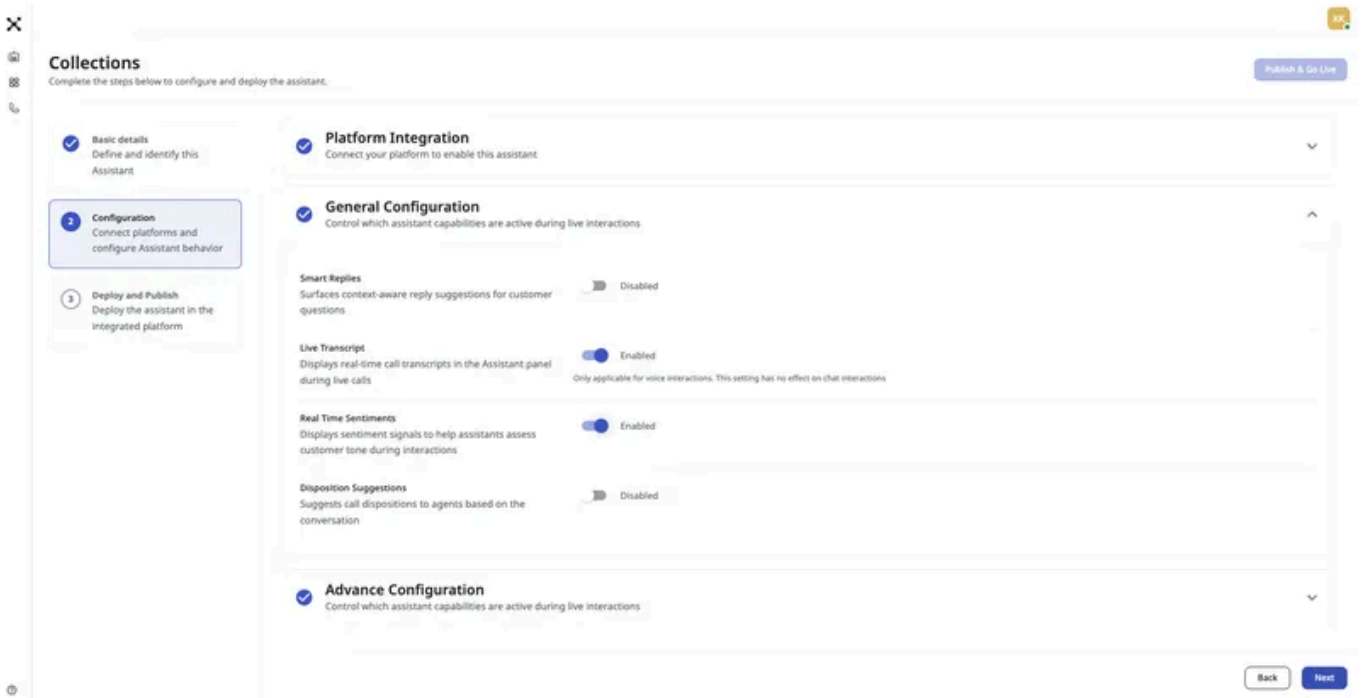
This section connects your platform to the assistant. It must be completed before the assistant can go live. Refer to the Platform Integration guide for setup steps specific to your

platform.



General Configuration

General Configuration controls the assistant capabilities that are visible to agents during live interactions. Each setting can be turned on or off independently using its toggle.



Smart Replies

What it does: Surfaces AI-generated reply suggestions to agents in real time, based on the customer's message.

Turn this on to help agents respond faster and more consistently. When disabled, no suggestions appear in the assistant panel.

When Smart Replies is enabled, two additional settings appear:

Max Words per Smart Reply

Controls the maximum length of each AI-generated reply suggestion. Enter a number to cap reply length. Leave the field blank if you want no limit.

Default: 20 words **Tip:** Shorter replies work better for quick acknowledgements. For complex queries, a higher limit gives the AI more room to be helpful.

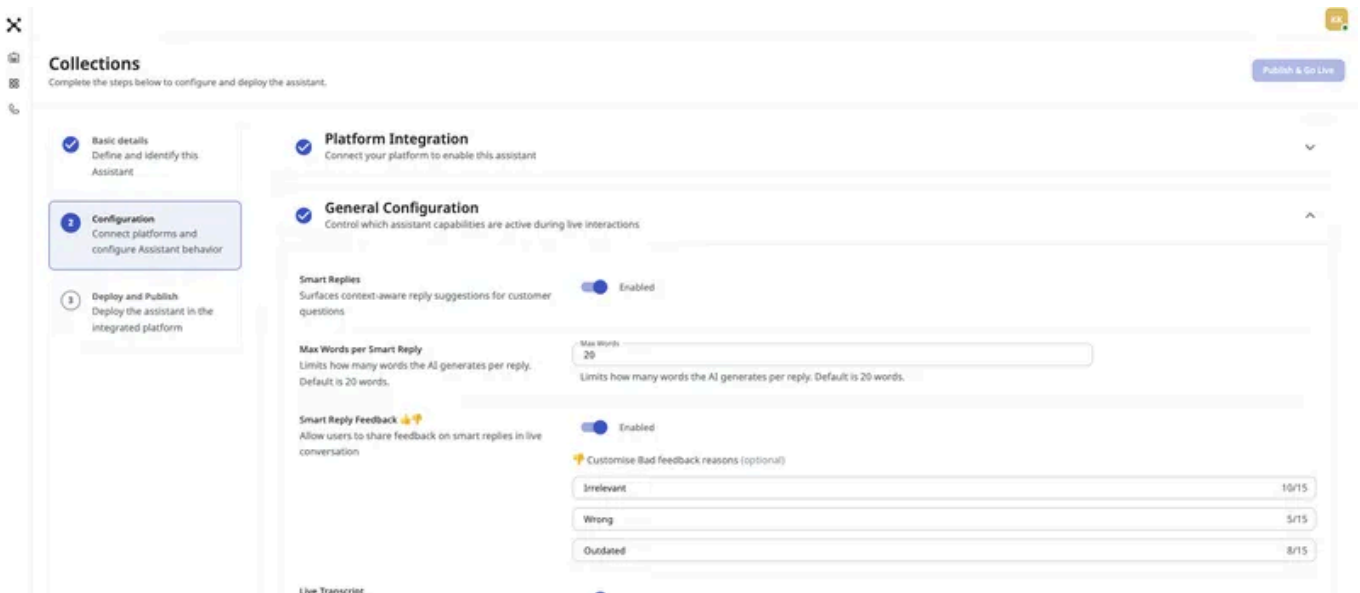
Smart Reply Feedback

Allows agents to rate individual smart replies as helpful or not during live conversations. This feedback can be used to improve suggestion quality over time.

When enabled, agents see thumbs up and thumbs down buttons on each suggestion.

Customise Bad Feedback Reasons (optional)

You can add up to three custom reasons that agents can select when they mark a reply as unhelpful – for example, "Irrelevant", "Wrong", or "Outdated". Each reason has a 15-character limit. These fields are optional; if left blank, agents can still give feedback without a reason.



Live Transcript

What it does: Shows a live, real-time transcript of the call in the assistant panel while an agent is on a voice call.

Note: This setting only applies to voice interactions. It has no effect on chat or messaging interactions.

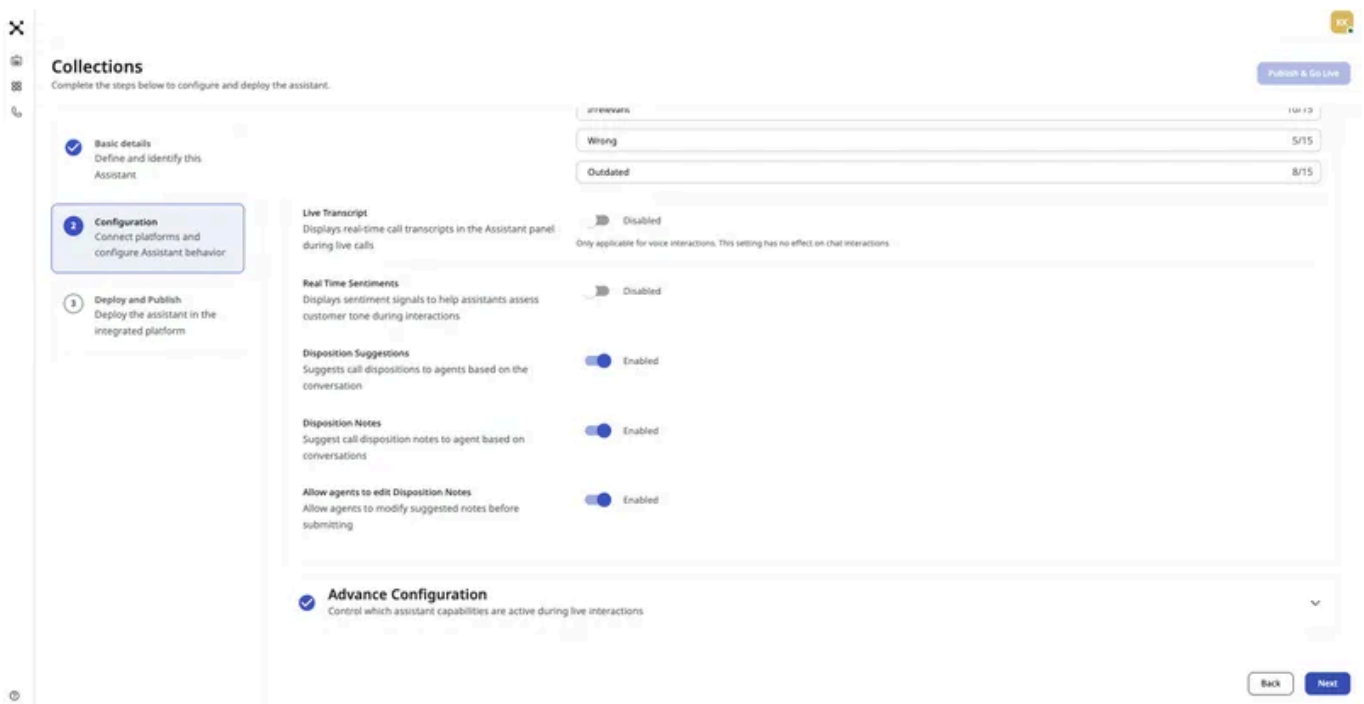
This toggle is currently disabled for chat-only setups. If your platform supports voice, contact your administrator to enable it.

Real Time Sentiments

What it does: Analyses the customer's tone during a conversation and displays sentiment signals (positive, neutral, negative) in the assistant panel.

This helps agents gauge how a customer is feeling without having to ask, so they can adjust their approach in the moment.

Disposition Suggestions



What it does: At the end of a conversation, the assistant suggests a call disposition (outcome category) based on what was discussed.

When Disposition Suggestions is enabled, two additional settings appear:

Disposition Notes

When enabled, the assistant also generates a short summary note to accompany the suggested disposition. This gives agents a starting point for call wrap-up rather than writing from scratch.

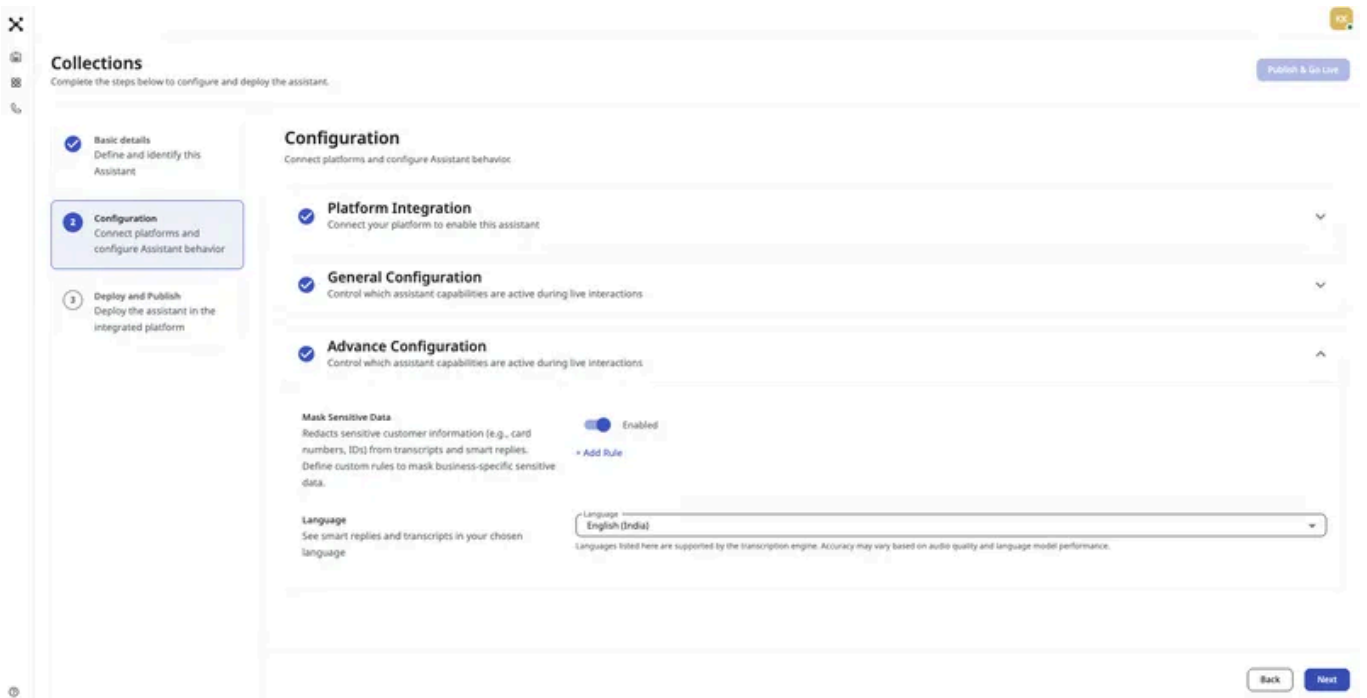
Allow Agents to Edit Disposition Notes

When enabled, agents can edit the AI-generated disposition note before submitting it. This is recommended if you want agents to verify accuracy or add context before the record is saved.

Tip: If you want agents to use AI-generated notes exactly as written without modification, turn this off.

Advanced Configuration

Advanced Configuration covers settings that affect data handling and language behaviour. These are typically set once during initial setup and rarely need to change.



Mask Sensitive Data

What it does: Automatically redacts sensitive customer information – such as card numbers, ID numbers, and personal identifiers – from transcripts and smart reply suggestions.

This is enabled by default and recommended for all deployments to protect customer privacy and meet data compliance requirements.

Add Rules: If your business handles specific types of sensitive data beyond the standard set (full name, mobile number, card numbers, etc.), you can define custom masking rules using the **+ Add Rules** option. This lets you extend masking to business-specific data formats.

Important: Disabling this setting means sensitive data may appear in transcripts and be visible to agents. Only disable if you have a specific reason and understand the compliance implications.

Language

What it does: Determines the language in which smart replies and transcripts are generated and displayed.

When enabled, the assistant uses your configured language setting for all AI-generated content in the panel.

Note: The languages available are determined by what your transcription engine supports. Accuracy may vary depending on audio quality and the specific language model in use. Contact support if you need a language that isn't currently available.

Saving Your Configuration

Button	What it does
Save and Next	Saves your configuration and moves to the next step (Deploy and Publish)
Save as Draft	Saves your changes without publishing. If the assistant is currently live, it will be taken offline. You will need to publish again to make it live.

Remember: If your assistant is currently live and you click Save as Draft, it will stop responding to users immediately. See Save as Draft – what happens to a live assistant for more details.

10. Interaction History

Overview

The Interaction History page gives you a complete record of every conversation handled by your AI assistants. Use it to review past interactions, check what suggestions were shown, read full transcripts, and see how interactions were wrapped up.

Use Interaction History to:

- Look up a specific conversation by date or assistant
- Review the AI suggestions that were surfaced during a call
- Read the full transcript to understand what was said
- Check how a conversation was tagged or closed via Dispositions
- Copy suggestion text for training or QA purposes

Interaction ID	Date and Time	Assistant ID	Assistant Name	Duration
a1916619-4d1a-4945-8927-66df116808f4	29/04/2026 11:02 AM	fe6b044f-ca24-4ca4-ad0c-d523fb32531a	QA Load Testing	39 sec
bcd9dc62-aa07-422b-9a8f-9172be7ebcd3	29/04/2026 10:51 AM	fe6b044f-ca24-4ca4-ad0c-d523fb32531a	QA Load Testing	25 sec
c5c4e896-a530-4134-b99b-68143a3d46c	29/04/2026 10:44 AM	fe6b044f-ca24-4ca4-ad0c-d523fb32531a	QA Load Testing	3 min 44 sec
592c9f00-65ed-4246-b7f0-3fbc3bed03b	28/04/2026 04:25 PM	fe6b044f-ca24-4ca4-ad0c-d523fb32531a	QA Load Testing	57 sec
ccc0881f-e4bc-4bd1-8bd7-8c9db480902e	28/04/2026 03:27 PM	fe6b044f-ca24-4ca4-ad0c-d523fb32531a	QA Load Testing	59 sec
0f57e1d-40e2-4a7d-b326-2481a23b51d6	28/04/2026 03:21 PM	fe6b044f-ca24-4ca4-ad0c-d523fb32531a	QA Load Testing	6 min 17 sec
c1d3aae7-40b2-41de-b2a8-e08da4562089	28/04/2026 03:19 PM	fe6b044f-ca24-4ca4-ad0c-d523fb32531a	QA Load Testing	42 sec
a226bee8-5ca8-4cc0-950f-18b3e48c16a6	28/04/2026 03:08 PM	fe6b044f-ca24-4ca4-ad0c-d523fb32531a	QA Load Testing	4 min 0 sec
adcd33f-c896-484e-88ce-aaae469c5c8c	28/04/2026 11:22 AM	fe6b044f-ca24-4ca4-ad0c-d523fb32531a	QA Load Testing	-
f6be879-a1ad-4464-b0de-0b583a6740bf	28/04/2026 11:08 AM	fe6b044f-ca24-4ca4-ad0c-d523fb32531a	QA Load Testing	-
78f2811d-38c6-4845-825e-334d006d017c	27/04/2026 09:56 PM	652e8a4b-7101-4817-8019-3edece130fc6	Scapia QA 1	30 sec
6972ab08-2f68-4355-8575-4d2d6fcc10d2	27/04/2026 07:50 PM	652e8a4b-7101-4817-8019-3edece130fc6	Scapia QA 1	-
7179c6cf-5ace-4a01-85dd-df12ae75fbed	27/04/2026 07:49 PM	36f9073b-427f-4984-a822-f9699ef6b1a8	Scapia QA 2	-
95e6e8e7-761c-4c4c-83ea-c03a2c2fcbd4	27/04/2026 07:47 PM	652e8a4b-7101-4817-8019-3edece130fc6	Scapia QA 1	-
67ea015-90d1-4e56-acc5-332e70d1d6dd	27/04/2026 07:44 PM	652e8a4b-7101-4817-8019-3edece130fc6	Scapia QA 1	-
2bc2802a-8804-46eb-ae72-08aee1bac3e0	27/04/2026 07:44 PM	652e8a4b-7101-4817-8019-3edece130fc6	Scapia QA 1	-
67838d4f-c525-46c2-b0de-5c43eee24f3b	27/04/2026 07:40 PM	652e8a4b-7101-4817-8019-3edece130fc6	Scapia QA 1	-
9d75e99b-9822-4151-8a6a-ed4f2a25b226	27/04/2026 07:38 PM	652e8a4b-7101-4817-8019-3edece130fc6	Scapia QA 1	-

Accessing Interaction History

Log in to Exotel AI Assist and click **Interaction History** in the left-hand navigation panel. The table loads automatically and shows your most recent interactions at the top.

Note: You must be logged in with an agent, QA, or admin role to view this page. If you don't see the navigation item, contact your workspace administrator.

The Interaction History Table

Each row in the table represents one AI-assisted conversation. Here's what each column means:

Column	What it shows	How it helps you
Interaction ID	A unique identifier for the conversation (e.g. a1916619-4d1a-...)	Use this when raising a support ticket or sharing a specific interaction with your team
Date and Time	When the interaction took place (DD/MM/YYYY HH:MM format)	Quickly find conversations from a specific day or time window
Assistant ID	The internal ID of the AI assistant that handled the call	Useful when investigating behaviour for a specific assistant configuration
Assistant Name	The human-readable name of the assistant (e.g. "Scapia QA 1")	Lets you filter and compare performance across different assistant setups

Filtering Your Interactions

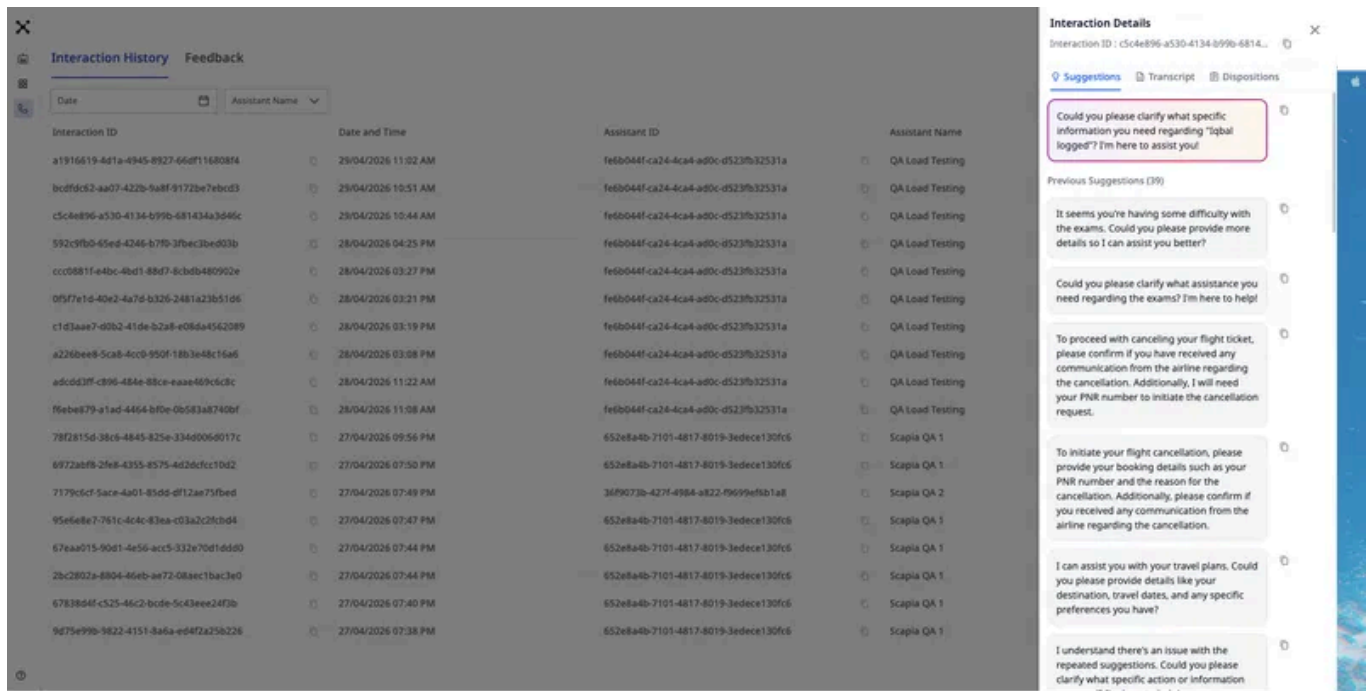
Two filters sit above the table to help you narrow down the list.

Date filter – Click the Date field to open a calendar picker. Select a single date or a date range to show only interactions from that period. Clear the filter to return to the full list.

Assistant Name filter – Click the Assistant Name dropdown to filter by one or more of your configured assistants. Useful when comparing interactions handled by different AI configurations.

Tip: Filters combine – if you set both a date and an assistant name, the table shows only interactions that match both conditions.

Viewing Interaction Details



Click any row in the table to open the **Interaction Details** panel on the right side of the screen. The panel header shows the full Interaction ID with a copy icon so you can quickly grab it.

The panel has three tabs: **Suggestions**, **Transcript**, and **Dispositions**.

Suggestions Tab

This tab shows the AI-generated suggestions that were surfaced to the agent during the live interaction.

Current Suggestion – The top card (highlighted in blue) shows the most recent suggestion from the interaction – what the AI recommended at the end of the conversation.

Previous Suggestions – Below is a scrollable list labelled "Previous Suggestions (n)" where n is the count. Cards appear in reverse-chronological order, so the most recent previous suggestion appears first.

Common suggestions you'll see:

- Greeting prompts – *"Hello! How can I assist you today?"*
- Information-gathering prompts – *"Could you please provide your booking details so we can process your flight cancellation?"*

- Verification prompts – *"To proceed with the cancellation, please confirm if the departure time is more than four hours from now."*

Copying a suggestion – Each suggestion card has a copy icon in the top-right corner. Click it to copy the text to your clipboard, then paste it into a training doc, QA report, or team channel.

Note: Duplicate suggestions may appear in the list when the AI re-surfaced the same prompt – for example, asking the same verification question twice if the customer didn't respond the first time.

Transcript Tab

The Transcript tab shows the full, turn-by-turn record of the conversation between the AI assistant and the customer. Use it to:

- Understand the full context of what was said
- Verify that the AI followed the expected conversation flow
- Identify where a conversation deviated from the script
- Prepare for a coaching or QA session

Dispositions Tab

Dispositions are the outcome tags applied to an interaction when it closes. This tab shows how the interaction was categorised – for example, whether it was resolved, escalated, or abandoned.

Use dispositions to:

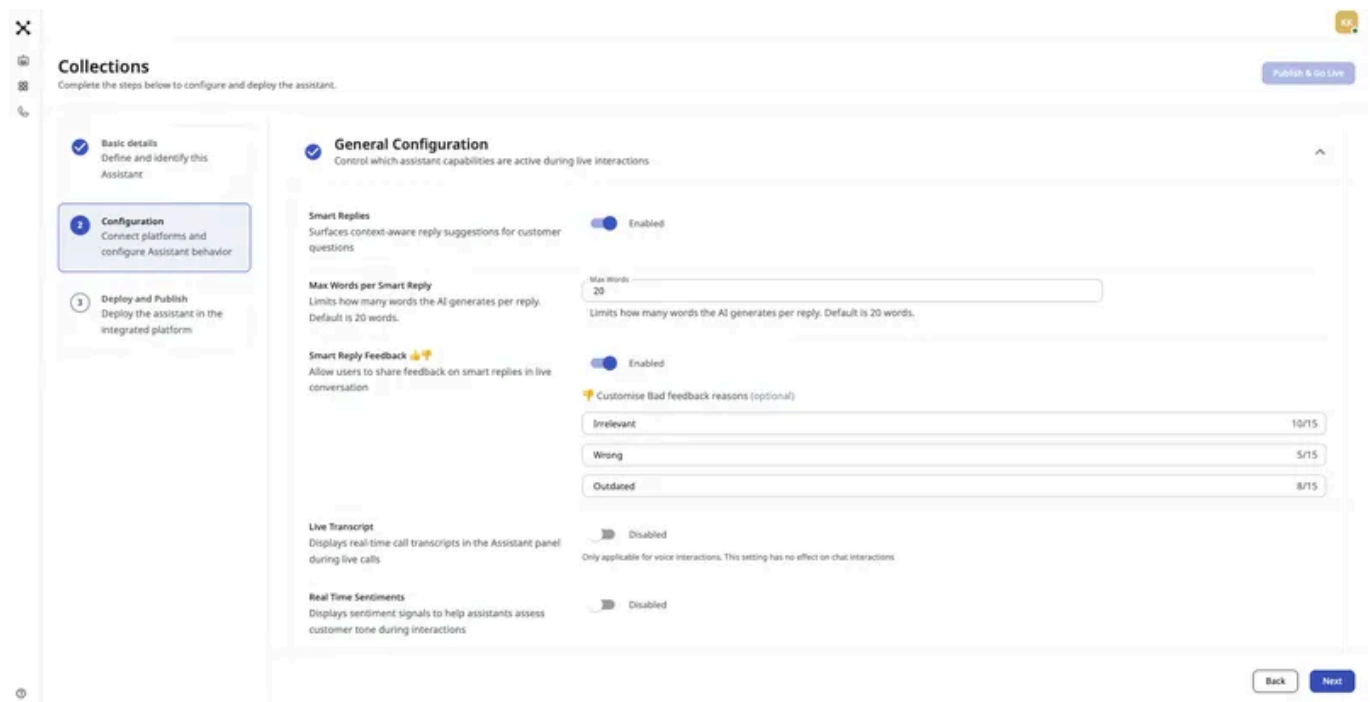
- Track resolution rates across your assistant configurations
- Spot patterns in escalations or unresolved interactions
- Generate data for weekly or monthly performance reviews

Tips for Common Scenarios

11. Collect Feedback on AI Smart Replies

Smart Reply Feedback lets agents rate AI-generated reply suggestions during live interactions. When enabled, agents can mark each suggestion as Good or Bad – and when marking Bad, select a specific reason. This gives administrators a clear signal on suggestion quality and helps improve the AI assistant over time.

For Admins: How to Configure Smart Reply Feedback

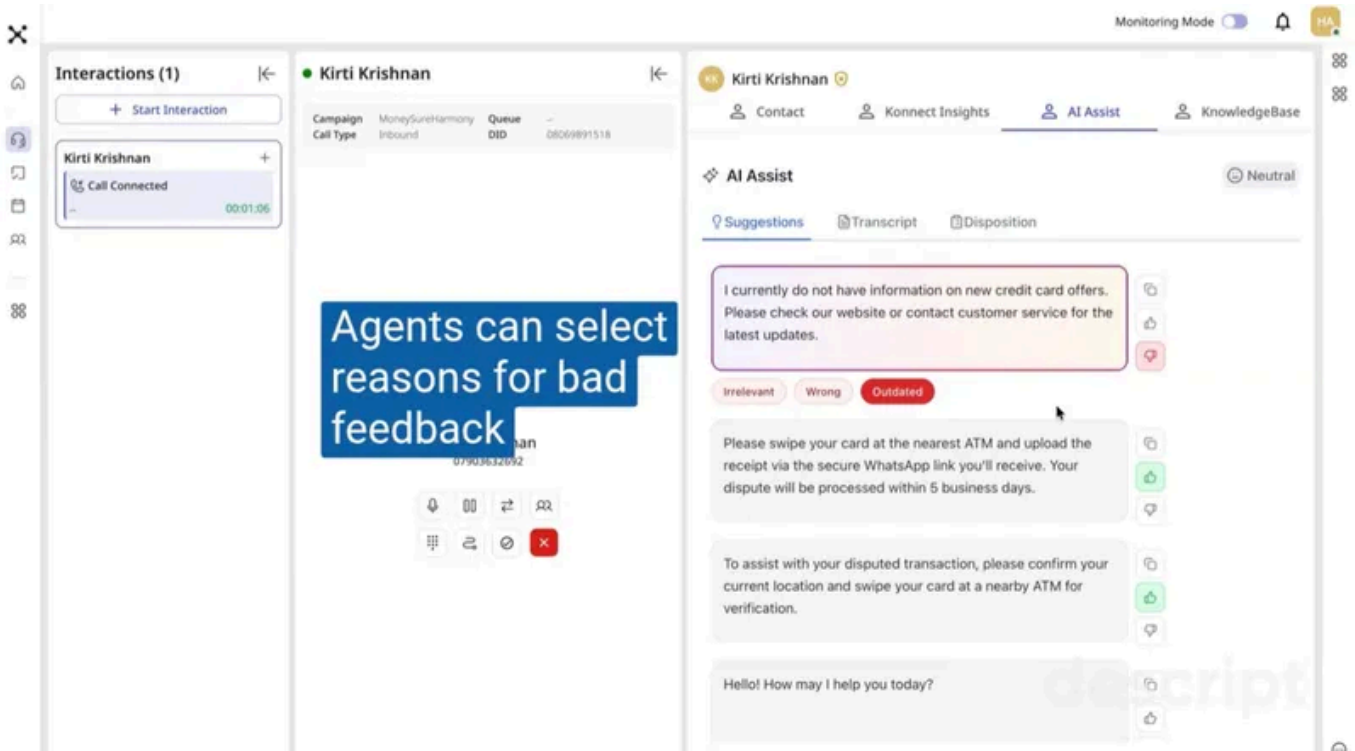


Smart Reply Feedback is configured in the assistant's setup flow, under the **Configuration** step.

1. Open the assistant you want to configure and go to **Step 2: Configuration**.
2. Scroll to the **General Configuration** section.
3. Locate **Smart Reply Feedback** and toggle it to **Enabled**.
4. Once enabled, a **Customise Bad Feedback Reasons** section appears. You can define up to three labels that agents see when they mark a suggestion as Bad. Each label can be up to 15 characters. The defaults are **Irrelevant**, **Wrong**, and **Outdated** – update these to suit your team's needs.
5. Proceed through the remaining steps and click **Publish & Go Live** to apply the changes.

Note: Smart Reply Feedback requires the **Smart Reply** toggle to also be enabled. If Smart Replies are turned off, feedback cannot be collected.

For Agents: How to Give Feedback on Smart Replies



When Smart Reply Feedback is enabled, feedback controls appear next to every suggestion in the AI Assist panel during a live interaction.

1. During an active call or chat, open the **AI Assist** tab in the right-hand panel.
2. The **Suggestions** tab will show AI-generated reply cards for the current conversation.
3. To rate a suggestion as **Good**, click the **thumbs up** (👍) icon next to it. The icon turns green to confirm.
4. To rate a suggestion as **Bad**, click the **thumbs down** (👎) icon. Reason buttons will immediately appear below the card.
5. Select the reason that best describes the problem – for example, **Irrelevant**, **Wrong**, or **Outdated**. Only one reason can be selected per suggestion.

Feedback is optional and does not affect how the suggestion is used. You can still copy and use a suggestion even if you mark it as Bad.

For Admins: How to View Recorded Feedback

Interaction ID	Date and Time	Assistant Name	Smart Reply	Transcript	Feedback	Bad Feedback reason
2c62217a-3ad3-4c65-aeed...	04/05/2026 11:16 AM	MoneySureHarmony Demo	To assist with your disputed transaction, please c...	Yes, I am looking to figure out that there is a disp...	Good	-
2c62217a-3ad3-4c65-aeed...	04/05/2026 11:16 AM	MoneySureHarmony Demo	Please make a payment for the amount of ₹10000...	Yes, my current location is Bangalore and I can sw...	Good	-
2c62217a-3ad3-4c65-aeed...	04/05/2026 11:16 AM	MoneySureHarmony Demo	I currently do not have access to your credit card balance information, please check your bank's mobile app or website, or contact customer service for assistance.	Okay. Do you have new offers for new credit cards...	Bad	Outdated
2c62217a-3ad3-4c65-aeed...	04/05/2026 11:16 AM	MoneySureHarmony Demo	I can't find the information you're looking for...	Okay I am travelling next week. Can you issue a n...	Good	-
2c62217a-3ad3-4c65-aeed...	04/05/2026 11:16 AM	MoneySureHarmony Demo	I currently do not have access to your credit card ...	Alright, thank you. Can you also help me with my ...	Good	-
11528396-5bfb-41e8-9302...	04/05/2026 11:14 AM	MoneySureHarmony Demo	I will update your delivery address to the new loc...	My address is ***** new. Delhi.	Good	-
11528396-5bfb-41e8-9302...	04/05/2026 11:14 AM	MoneySureHarmony Demo	Our support team operates until 8 PM. If you nee...	Also I want to enquire when does the support do...	Bad	Wrong
11528396-5bfb-41e8-9302...	04/05/2026 11:14 AM	MoneySureHarmony Demo	I currently do not have information on available o...	There are any offers that are available right now?	Bad	-
1164c50d-64ee-472f-9822...	29/04/2026 03:47 PM	MoneySureHarmony Demo	आपकी फिलहाल कोई भी जानकारी नहीं है। कृपया अपने मोबाइल ऐप या वेबसाइट पर जाकर जानकारी प्राप्त करें।	जी हाँ, मैं आपके लिए कुछ नए ऑफर ढूँढ रहा हूँ।	Bad	-
1164c50d-64ee-472f-9822...	29/04/2026 03:47 PM	MoneySureHarmony Demo	आपकी समस्या को सुझावों से हल करने में मदद के लिए कृपया अपने बैंकिंग ऐप पर जाकर देखें।	आपकी समस्या को मैंने देखा है। मैं इसे ठीक करने में मदद कर रहा हूँ।	Good	-
1164c50d-64ee-472f-9822...	29/04/2026 03:47 PM	MoneySureHarmony Demo	कृपया मोबाइल ऐप पर जाकर, जहाँ आपकी जानकारी सहेज रखी है, वहाँ से जानकारी प्राप्त करें।	हाँ जी, मैं आपके लिए कुछ नए ऑफर ढूँढ रहा हूँ।	Bad	-
1164c50d-64ee-472f-9822...	29/04/2026 03:47 PM	MoneySureHarmony Demo	कृपया मोबाइल ऐप पर जाकर, जहाँ आपकी जानकारी सहेज रखी है, वहाँ से जानकारी प्राप्त करें।	आपकी समस्या को मैंने देखा है। मैं इसे ठीक करने में मदद कर रहा हूँ।	Bad	Bad

All agent feedback is captured and available in **Interaction History**.

1. Navigate to **Interaction History** from the main menu.
2. Click the **Feedback** tab at the top of the page.
3. Use the filters to narrow the data by **Date**, **Assistant Name**, or **Feedback** type (Good / Bad).
4. Each row represents a smart reply suggestion that received feedback. The table shows:
 - **Interaction ID** – the unique ID for the customer interaction
 - **Date and Time** – when the suggestion was shown to the agent
 - **Assistant Name** – the AI assistant that generated the suggestion
 - **Smart Reply** – a preview of the suggestion text
 - **Transcript** – the customer message that triggered the suggestion
 - **Feedback** – Good or Bad rating given by the agent
 - **Bad Feedback Reason** – the reason selected when feedback was Bad (e.g. Outdated, Wrong); a dash means no reason was provided or feedback was Good

Using feedback to improve the assistant:

- A pattern of **Outdated** feedback indicates the knowledge base has stale content that needs refreshing.
- Frequent **Wrong** feedback suggests the assistant is misinterpreting certain query types – review and refine the source content for those topics.

- Frequent **Irrelevant** feedback may mean certain customer intents lack dedicated coverage in the knowledge base.

Reviewing this data weekly and comparing trends over time is the most effective way to drive measurable improvement in suggestion quality.