

# Auto-Pilot Forms

## Feature Summary

In the middle of conversations, agents often request repetitive sequences of information from customers and have to validate each data point individually. With Auto-Pilot Forms, agents can start an automated process that collects multiple pieces of information from a customer while they focus on other tasks, only pivoting back when all fields are validated and submitted.

Autopilot Forms are recommended to the agent in real time and can also be accessed from the Quick-Send menu.

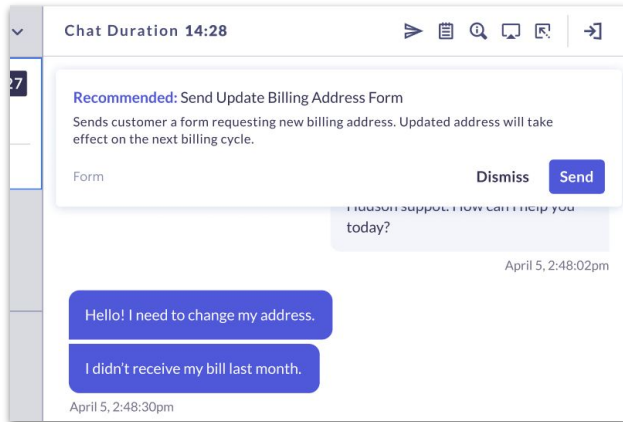
## Key Benefits

- Improve agent efficiency with an automated process that gathers multiple pieces of information at once.
- Maintain a positive customer experience by keeping them connected while allowing the agent to focus on other tasks
- Save time by automatically validating the information that the customer submits.

The screenshot displays the ASAPP Agent Desk interface. On the left, a chat window for Denise Suárez (Issue #130001) shows a conversation where the customer reports a new cell phone and asks for help. The agent responds and offers a 'Verify Account' form. The form is titled 'Device identification:' and contains fields for IMEI Number (351756051523999) and Credit Card Number. Below the form, it indicates 'Form submitted January 31, 5:12:49pm'. The agent then asks for the customer's exact address. On the right, a customer profile card for Denise Suárez is visible, showing account overview, billing address (987 Central Ave, Los Angeles, CA 90001), and phone numbers. Below the profile, there is a 'BILLING AND PAYMENT OVERVIEW' table and a 'CUSTOMER BROWSER BEHAVIOR' section with two URLs.

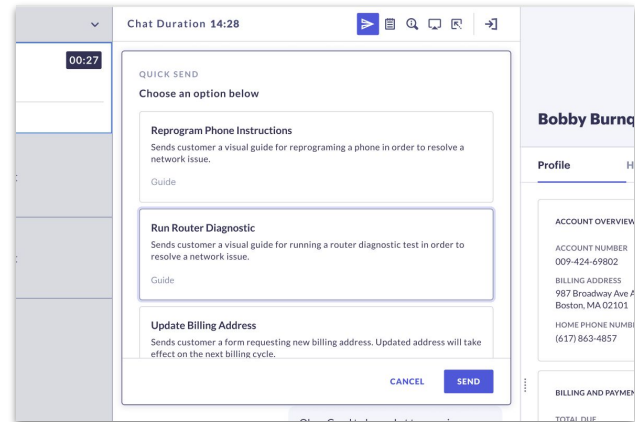
TOTAL DUE	PAST DUE	LAST CYCLE
\$198.47	\$115.98	\$145.21

Current URL	Previous URL
<a href="https://sdk-staging.asapp.com/chat-sdk-demo.html?APIHotname=rome-qd01.test.asapp.com">https://sdk-staging.asapp.com/chat-sdk-demo.html?APIHotname=rome-qd01.test.asapp.com</a>	<a href="https://sdk-staging.asapp.com/chat-sdk-demo.html?APIHotname=rome-qd01.test.asapp.com">https://sdk-staging.asapp.com/chat-sdk-demo.html?APIHotname=rome-qd01.test.asapp.com</a>



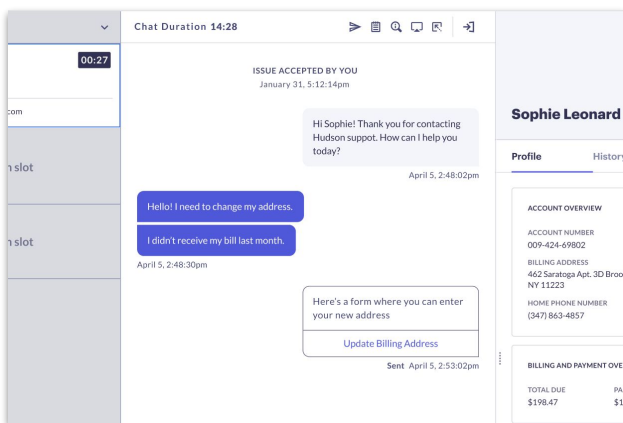
### Realtime Suggestions

The Auto-Pilot model will recommend that the agent sends a customer a form in real time. The agent can either choose to 'Send' or 'Dismiss' the suggestion.



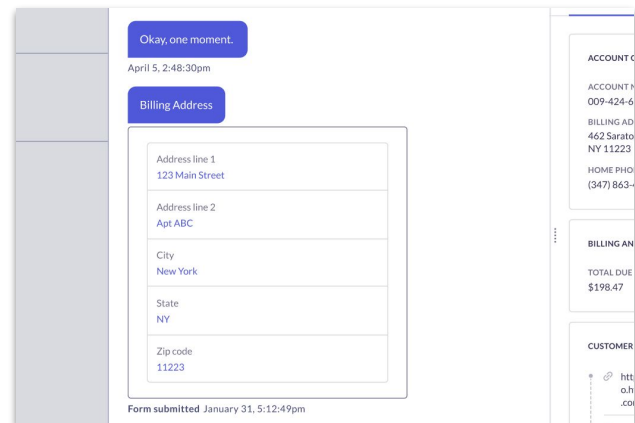
### Quick-Send Menu

The agent can access all available forms from the Quick-Send menu dropdown at the top of the chat panel at any time.



### Preview of Sent Form in Chat Log

Once the agent has sent a form to the customer, the form will appear as a sent component in the chat log. The agent can click on the form to review exactly what the customer sees.



### Submitted Form Displays in Chat Log

When the customer submits the form, the responses will display in the chat log. The agent can hover over and click-to-copy any of the field values.

*Note: the customer and agent can continue to send messages back and forth regardless of whether the form has been opened, filled out, or submitted.*