

# Automatic Summary

Automatic Summary is the first step towards the end-to-end automation of the entire disposition process. It consists on the automatic generation of summary tags that represent the most relevant events that took place during the conversation between the customer and the agent.

The automatic summary is generated when the agent is finishing the conversation, replacing manual disposition note-crafting and therefore reducing their after-conversation work.

The screenshot displays the ASAPP Agent Desk interface. On the left, a chat window shows a conversation with Penelope Williams-Smith (208-832-00297). The issue is 'Change Plan' (20883200297) with a duration of 01:25. The chat history includes:

- Customer: "Yes, for this request they can check and fix what happened to your account."
- Agent (Penelope Williams-Smith): "Okay"
- Customer (Mateo Sanchez): "Aside from this, is there anything else?"
- Agent: "There is not, no."
- Agent: "Thank you!"
- Customer: "You're most welcome. Thank you for chatting with us and have a nice evening. Bye and take care, Katy."

Below the chat, there are suggestions for the call:

- Signal loss error complete/partial (Flows > Signal Code)
- Soft Disconnect Inquiry/Wants to Restore... (Flows > Signal Code)
- Receiver Message Signal Code... (Know... > Signal Code)

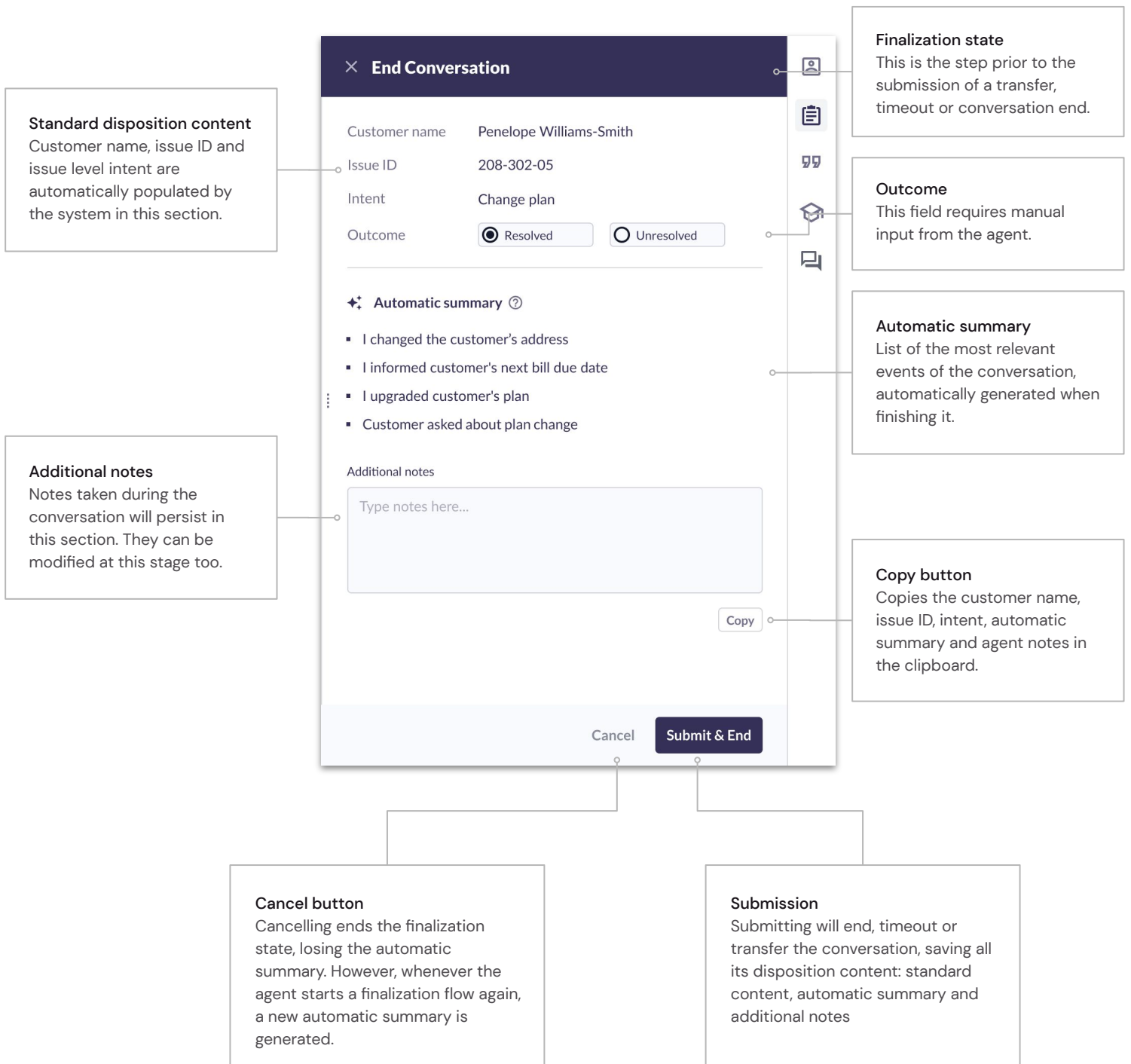
On the right, the 'End Conversation' panel is open, showing:

- Customer name: Penelope Williams-Smith
- Issue ID: 208-302-05
- Intent: Change plan
- Outcome:  Resolved  Unresolved
- Automatic summary:
  - I changed the customer's address
  - I informed customer's next bill due date
  - I upgraded customer's plan
  - Customer asked about plan change
- Additional notes: A text input field with the placeholder "Type notes here..." and a "Copy" button.

At the bottom of the 'End Conversation' panel, there are "Cancel" and "Submit & End" buttons.

## Disposition modal deep dive

When finishing the conversation, the disposition modal in the right hand panel is automatically displayed, showing **standard disposition content**, the **automatic summary** and any **additional notes** the agent might have written throughout the conversation.



## Automatic Summary component deep dive

**End Conversation**

Customer name Penelope Williams-Smith  
Issue ID 208-302-05  
Intent Change plan  
Outcome  Resolved  Unresolved

**1** ✨ **Automatic summary** **2** ⓘ

- I changed the customer's address
- I informed customer's next bill due date
- I upgraded customer's plan
- Customer asked about plan change

Additional notes

Type notes here...

Copy

Cancel **Submit & End**

### 1. Automatic Summary

List of up to 6 summary tags generated by our Fully Automated Summarization Technology (FAST) system.

These tags capture the key events of the conversation, specifically:

- Customer & agent actions
- Expressions of intent (can be more than one per conversation)

### 2. Help icon

By hovering this icon agents get a brief explanation of the automatic summary feature.

### 3. Tag removal

Agents can remove tags from the automatic summary by hovering them and clicking on the X button.

### Automatic Summary empty state

The amount of summary tags generated per summary depends on the confidence of our FAST system for a given conversation. This implies that for some of them –the minority– there will not be an automatic summary.

#### × End Conversation

Customer name Penelope Williams-Smith

Issue ID 208-302-05

Intent Change plan

Outcome  Resolved  Unresolved

---

✦ Automatic summary ?  
Unable to generate accurate summary

Additional notes

Type notes here...

Copy

Cancel **Submit & End**

**Automatic Summary empty state**  
Agents will get this message when the FAST system retrieves zero summary tags

## Agent notes

Agents can write down notes and details during the conversation. These will persist at the moment of finalizing a conversation.

### 1. Ongoing conversation

#### Notes

Customer name	Penelope Williams-Smith
Issue ID	208-302-05
Intent	Change Plan

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Notes

Original plan: CT-L500

⋮ Copy

### 2. Finishing conversation

#### × End Conversation

Customer name	Penelope Williams-Smith
Issue ID	208-302-05
Intent	Change plan
Outcome	<input checked="" type="radio"/> Resolved <input type="radio"/> Unresolved

---

✦ Automatic summary ⓘ

- I changed the customer's address
- I informed customer's next bill due date
- I upgraded customer's plan
- Customer asked about plan change

Additional notes

Original plan: CT-L500

⋮ Copy

Cancel Submit & End

Notes taken during the conversation in the **Notes** section will appear in the **Additional notes** section when finishing the conversation.

## Customer history cards

Disposition content can be found by agents in the customer history cards. This information helps them to take at-a-glance overview of the customer and ramp up on the conversation faster, specially on transfers and call-backs.

**Issue-level content**  
Top section of the customer history card. It includes:

- Intent
- Issue duration
- (icon) Customer's channel
- (icon) Type of assistant
- Issue ID
- Outcome

**Assignment-level content**  
Bottom section of the customer history card.

An issue can have multiple assignments depending on whether there were transfers and/or timeouts.

This section includes, for each assignment of the issue:

- Agent name
- Agent ID
- Automatic summary
- Agent note

## Customer History Card

Customer history cards can be found in the Customer Profile section in the right hand panel.

## Automatic Summary configuration

Automatic Summary feature can be turned ON or OFF. When turned OFF, there are two possible configurations: (A) opt-in conversation summary tags or (B) no directed automation at all.

### Alternatives to Automatic Summary

**End Conversation**

Customer name Penelope Williams-Smith

Issue ID 208-302-05

Intent Change plan

Outcome  Resolved  Unresolved

Notes

- I changed the customer's address

...

I changed the customer's address Copy notes

Customer disputed the billing fee +

I refunded the billing fee +

Cancel Submit & End

#### A. Opt-in conversation summary tags

Agents get up to 6 suggestions of conversation summary tags during the conversation and at the end of it. They have to select a tag in order to include it in the disposition note.

**End Conversation**

Customer name Penelope Williams-Smith

Issue ID 208-302-05

Intent Change plan

Outcome  Resolved  Unresolved

Notes

- I changed the customer's address

...

Copy notes

Cancel Submit & End

#### B. No directed automation

There is no automation to help agents craft disposition notes.