Agent Assist Studio

Administrator's Guide

August 2026

Learn how to set up Agent Assist to provide agents real-time conversation transcripts and guidance during calls, create Guidance cards and task lists, and view reports on how AI is working in your contact center.

About Five9

Five9 is the leading provider of cloud contact center software, bringing the power of the cloud to thousands of customers and facilitating more than three billion customer interactions annually. Since 2001, Five9 has led the cloud revolution in contact centers, delivering software to help organizations of every size transition from premise-based software to the cloud. With its extensive expertise, technology, and ecosystem of partners, Five9 delivers secure, reliable, scalable cloud contact center software to help businesses create exceptional customer experiences, increase agent productivity and deliver tangible results. For more information visit www.five9.com.

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Contents

What's New

Release	Change	Topic
Aug 2026	Campaign, skill, and agent scoping now happens directly on the Create Assistant screen using the new Filter Type option, and redaction policies are now managed from the Transcription Settings panel instead of inline.	**Creating assistants and enabling transcriptions**
Jul 2026	Consolidated the overview and permission information, added links to Admin Console documentation for login instructions, and added new agentassist permissions.	**Agent Assist Studio overview**
Mar 2026	Added a note on default PCI and PII redactions for compliance.	**Agent Assist Studio redaction**
Feb 2026	Added Advanced Configuration Guidance Card content.	**Agent Assist Studio Rule Engine**
Sep 2025	Added new Redaction and Dictionary content.	**Agent Assist Studio redaction** **Agent Assist Studio dictionaries**
Jul 2025	Added AI Knowledge content.	**AI Knowledge in Agent Assist Studio**
Jul 2024	Added cross references to AI Model Manager Adminstrator's Guide.	**Understanding the workflow**
	Updated screenshots to reflect new location of Summary tab.	
Jan 2024	Added edited Summaries to the list of filters and added content on viewing edited summaries.	**Viewing Edited Summaries**
	Added summary permission subset.	
Oct 2023	Added content on the Guidance Card Library.	**Agent Assist Studio guidance cards**
	Added a topic on working with rules and managing keyword sets.	

Agent Assist Studio overview

The Five9 AI applications Agent Assist Studio and AI Model Manager leverage artificial intelligence, natural language processing, and machine learning (AI, NLP, and ML) to provide agents using Agent Assist real-time guidance during customer conversations and summarize conversations for analysis. Agent Assist Studio and AI Model Manager allow you to:

- Empower agents to perform better and focus on customers.
- Automate manual, repetitive tasks for agents.
- Facilitate performance improvement by providing supervisors robust reporting and analytics.
- Enable non-technical users to deploy new AI models across contact center skills and campaigns.

To access and use **Agent Assist** features, you must have the appropriate permissions. For details, see **Agent Assist permissions**.

Administrators with appropriate permissions can create and edit user accounts and assign permissions in Five9 Admin Console. See Users and Permissions and Permission Sets in the Administrator Console Administrator's Guide.

Using your administrator credentials, log in to your Five9 Admin Console account to configure **Agent Assist**.

For details on how to log in to your Five9 account, see Logging In to Five9 Admin Console in the Administrator Console Administrator's Guide. Once you are logged in, the Five9 Admin Console home page appears.

> **Note:** If the **Agent Assist** card is not visible on the Five9 Admin Console home page, contact your administrator for assistance.

Agent Assist permissions

The following table outlines the permissions required to enable **Agent Assist**.

Group	Subset	Subset	Subset	Permission	Description
`agentassist-by-channel`	`chat/email/voice`	`after-call-summaries`		Access Agent Assist Studio after call	Permissions

Group	Subset	Subset	Subset	Permission	Description
				summary configuration view	that allow users to view and configure after-call summary settings in Agent Assist Studio. These summaries provide agents with concise, automated recaps of customer interactions after a call ends. Administrators can enable or disable summary cards, copy or download summaries, and manage summary library content to ensure accurate and actionable post-call insights.
`agentassist-by-channel`	`chat/email/voice`	`enable`	`guidance`	Enable toggle guidance cards view Enable guidance cards panel	Permissions that allow users to toggle the Guidance workspace on or off and view guidance cards. These cards provide real-

Group	Subset	Subset	Subset	Permission	Description
					time tips or scripts to assist agents during interactions.
			`summaries`	Enable copy summary button Enable download summary button	Permissions that allow users to toggle the Summary workspace, copy summaries, and download summary content. This ensures agents can access and manage after-call summaries efficiently.
			`summary`	Enable toggle summary card view	Permissions that allow users to toggle individual Summary cards within the workspace and enable the summary card panel. This gives agents flexibility to view or hide specific summary details during or after interactions.
`agentassist-by-channel`	`chat/email/voice`	`guidance-configuration`		Access Agent Assist Studio guidance configuration	Permissions that allow

Group	Subset	Subset	Subset	Permission	Description
				create Access Agent Assist Studio guidance configuration delete Access Agent Assist Studio guidance configuration read Access Agent Assist Studio guidance configuration update	administrators to create, update, read, and delete guidance configurations in Agent Assist Studio. Guidance cards provide real-time assistance to agents during interactions, such as suggested responses or process steps. These permissions ensure that admins can design, maintain, and control the guidance experience for agents, including enabling or disabling guidance panels and toggling visibility in the workspace.
agentassist-by-channel	chat/email/voice	keywords		Access Agent Assist Studio keywords create Access Agent	Permissions to create, update, read, and delete keywords used

Group	Subset	Subset	Subset	Permission	Description
				Assist Studio keywords delete Access Agent Assist Studio keywords read Access Agent Assist Studio keywords update	in guidance and summaries. Keywords help define triggers and context for guidance cards and summaries.
agentassist-by-channel	chat/email/voice	pushcard-configuration		Access Agent Assist Studio push card create Access Agent Assist Studio push card delete Access Agent Assist Studio push card read Access Agent Assist Studio push card update	Permissions to create, update, read, and delete push cards. Push cards deliver real-time guidance or information to agents during interactions.
agentassist-by-channel	chat/email/voice	summaries		Access Agent Assist Studio summaries delete	This permission allows administrators to delete summaries in Agent Assist Studio. Summaries include automated after-call recaps and

Group	Subset	Subset	Subset	Permission	Description
					summary cards that provide agents with interaction insights. Deleting summaries ensures outdated or incorrect information is removed from the system, maintaining data accuracy and compliance.
`agentassist-by-channel`	`chat/email/voice`	`summary`	`library`	Create and Update Summary Library Delete Summary Library View Summary Library	Permissions that allow administrators to create, update, view, and delete summary templates stored in the Agent Assist Studio library. These templates define the structure and content of after-call summaries and summary cards, ensuring consistency and accuracy across agent interactions.

Group	Subset	Subset	Subset	Permission	Description
					Managing the summary library helps maintain standardized reporting and improves agent efficiency by providing ready-to-use summary formats.
				Update agent summary card contents	This permission allows administrators to edit the content displayed on agent summary cards in Agent Assist Studio. Summary cards provide agents with quick, actionable insights from customer interactions. By updating these cards, administrators can ensure that the information presented is accurate, relevant, and aligned with business requirements or compliance standards.

Group	Subset	Subset	Subset	Permission	Description
agentassist-by-channel	chat/email/voice	tasklist-configuration		Access Agent Assist Studio tasklist configuration create Access Agent Assist Studio tasklist configuration delete Access Agent Assist Studio tasklist configuration read Access Agent Assist Studio tasklist configuration update	Permissions to create, update, read, and delete task lists in Agent Assist Studio. Task lists define structured workflows for agents during customer interactions.
agentassist	enable	guidance		Enable toggle guidance cards view Enable guidance cards panel	Permissions that allow agents to display and interact with the Guidance workspace in Agent Assist Studio. Agents can toggle the guidance cards panel on or off and view guidance cards during customer interactions. Guidance cards deliver real-time tips, suggested

Group	Subset	Subset	Subset	Permission	Description
					responses, or process steps to help agents handle interactions effectively.
		`summaries`		Enable highlight and copy summary content Enable download summary button	Permissions that allow agents to interact with and export after-call summary content in Agent Assist Studio. Agents can highlight and copy summary content and download a summary file for reference or record-keeping. These permissions give agents direct access to automated interaction recaps generated at the end of each call.
		`summary`		Enable toggle summary card view Enable summary card panel	Permissions that allow agents to display and manage

Group	Subset	Subset	Subset	Permission	Description
					individual summary cards within the Summary workspace in Agent Assist Studio. Agents can toggle the summary card panel on or off and show or hide specific summary cards during or after an interaction. This gives agents flexibility to focus on the post-call insights most relevant to their workflow.
		`transcripts`		Enable highlight and copy transcript content Enable download transcript button Enable toggle transcript view Enable transcript panel	Permissions that allow agents to display, interact with, and export the Conversation Transcript pane in Agent Assist Studio. Agent Assist automatically transcribes customer interactions in real time across voice,

Group	Subset	Subset	Subset	Permission	Description
					chat, and email channels, providing agents with a live text record of each interaction. Agents can toggle the transcript panel on or off, highlight and copy transcript content, and download a transcript file for reference or compliance purposes. Transcripts also support downstream features such as guidance cards and after-call summaries.

Understanding terms

These terms are used throughout this content to describe the Agent Assist Studio workflow.

> **Note:** Five9 VCC terms are not defined (for example, campaign). It is assumed that you are familiar with Five9 VCC terms.

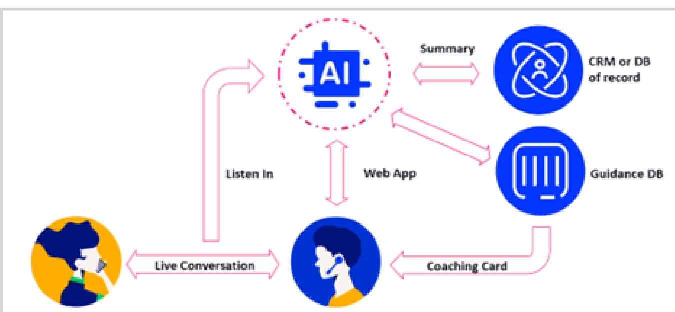
Term	Definition
After Call Summary	A condensed recap of the interaction automatically generated after a call ends.
AI Knowledge	A collection of knowledge sources (such as documents or FAQs) that agents and IVAs can query during interactions. AI Knowledge provides AI-generated answers and related articles to help resolve customer inquiries.
Assistant	Assistants are the Artificial Intelligence behind Agent Assist Studio. The workflow for administrators is: **1** Defining assistants for their purpose. You define assistants for the customer experience and to train your agents. **2** Mapping assistants to campaigns. **3** Training assistants.
Dialogflow	Google's natural language understanding (NLU) platform.
Dialogflow Intent	The definition of an intent object in Dialogflow.
Dictionary	A custom vocabulary of domain-specific or organization-specific terms used to improve transcription and intent recognition accuracy.
Entity	Entities modify intents. For example, if the customer says, "My phone battery won't charge," the entities are *phone* and *battery*. Entities are sometimes referred to as *slots*. Entity names are in camel case, for example “dateTime” and “newsType”.
Event Trigger	Event triggers are when the NLP detects keywords or intents. You define event triggers and the ensuing actions in rules.
Feedback	The like/unlike icons and comment fields agents use to rate guidance cards and summaries. Feedback helps improve AI accuracy and relevance.
Guidance card	Cards you create to train agents and assistants. They display in Conversation Architect to train agents and assistants what to say during customer conversations. You can create campaign-based cards and assign them to assistants. • For different campaigns, you assign an assistant to each campaign. Each assistant gets a separate model and intent list.

Term	Definition
	These intents can be configured to show different summaries and coaching. • For similar campaigns that require white labeling or have different compliance parameters, you can create separate summary items and guidance cards, which display when the campaign is listed. If a campaign is not listed, these summary items and guidance cards display for all campaigns.
Guidance Configuration	This sets which guidance card to show when an intent is identified. Guidance configuration can be customized based on a campaign.
Intent	Intents are the reason your customer is contacting your call center—their intention. For example, if the customer says, "My phone battery won't charge," their intent is to get a new battery. You train your assistants about intents important to your core business using *entities* and *suggestions*.
Intent Event	This is the object published when Dialogflow detects an intent. This object contains the Intent Event key.
IVA (Intelligent Virtual Agent)	An AI-powered application that allows businesses to deliver intuitive resolutions for common questions across voice and digital channels.
Keyword	Keywords are words or phrases (up to 3 words) that you combine in a keyword set that the NLP listens for on the specified stream (inbound or outbound/caller or agent). Keyword detection triggers rules to run that display guidance cards and notes or feedback fields to agents.
Knowledge Group	A set of knowledge sources associated with a specific assistant or campaign. Used to filter what content is searchable in Agent Assist.
Model	Models are collections of intents.
Prompt	A predefined instruction or query pattern that shapes how Five9 GenAI responds to an agent or IVA question. Prompts determine the tone, style, and focus of generated answers.
Redaction Ruleset	A defined set of rules specifying what information to automatically remove from transcripts (e.g., profanity, numeric data, or PCI-sensitive details).
Rule Engine	Rules define what events trigger an action, such as displaying a guidance card.
Task List	A checklist that guides agents to complete specific actions during or after calls. Task lists can be triggered by events and tracked in

Term	Definition
	reports for completion metrics.
Training Phrases	Training phrases are the data used to train the model to detect intents. It takes approximately 30 training phrases to train the model for each intent.
Suggestion	Training data that relates to an intent.
Summary Configuration	This is the summary line item sent when an intent is identified. Summary configuration can be customized based on a campaign.
Workflow Automation (WFA)	A Five9 feature that writes Agent Assist data (like transcripts and summaries) to third-party CRMs or storage systems through automated reactions.

Understanding the workflow

The following illustrates the typical AI Model Manager and Agent Assist Studio workflow.



These are the different tasks performed in AI Model Manager and actions that occur in Agent Assist Studio:

AI Model Manager Tasks	Agent Assist Studio Actions and Tasks
• Define models ◦ Create models ◦ Associate campaigns or skills with models ◦ Review transcripts and analyze for intents	• Configure summaries • Configure Guidance cards • Dashboards and reports ◦ Display metrics on agents ◦ Display metrics on task list completion

<table>
<tr><th>AI Model Manager Tasks</th><th>Agent Assist Studio Actions and Tasks</th></tr>
<tr><td>

<li style="list-style:none">
Define intents
Manage meta data

Train models

Identify training data for intents
Improve intent accuracy

Configure models

See AI Model Manager Adminstrator's Guide.
</td><td>

Configure AI task lists
Display transcript in real time
Display automated summary
Edit call summaries
Display Guidance cards
Display after call summaries
Create rules for displaying Guidance cards and after call summaries
Rate Guidance cards and summaries
Display AI task lists

</td></tr>
</table>

Working with assistants

Assistants define the AI experience delivered during customer interactions. An assistant is a collection of configurations that determine how Agent Assist behaves across a set of campaigns or skills. These configurations include settings such as language, the speech-to-text models used to transcribe audio calls, intent detection, LLM triggers, guidance cards, task lists, and the types of AI-powered summaries applied to conversations.

Assistants can be associated with one or several campaigns or skills, allowing you to tailor the experience to different customer or business needs. Note that each campaign can be associated with only one assistant.

Each assistant controls how Agent Assist listens for intents or events, which actions to trigger, and what information to present to agents in real time. You can configure assistants to push guidance cards, display task lists, and generate AI summaries to enhance agent performance and ensure consistent customer experiences.

Important

Before launching Agent Assist Studio, provision **all admin** users, including yourself, in your Five9 Admin Console.

You manage assistants on the **Create Models** page in AI Model Manager. See the AI Model Manager Adminstrator's Guide.

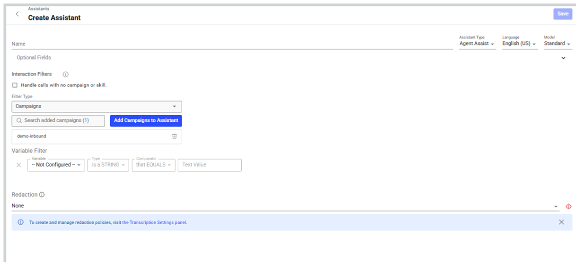
Choose an assistant (select the gear on the card) on the **Select Assistant** page to configure the associated summaries, guidance cards, task lists, and feedback.

Creating assistants and enabling transcriptions

Creating assistants and enabling transcriptions

You create assistants and manage transcriptions and summaries in Five9 Admin Console.

Note: Users must also have AI Model Manager permissions to perform this task. See and AI Model Manager Adminstrator's Guide.



To create an assistant:

1. Log in to Five9 Admin Console.
2. Select the **AI Model Manager** card.
3. Select **Create Models** from the **Model Manager** section of the navigation menu.
4. Select **Create**.
5. Complete the form:
   a. Name the assistant. Ensure that the name reflects the conversations that the assistant will transcribe.
   b. To the right of **Name**, choose the **Assistant Type**, **Language**, and **Model** (select Standard unless otherwise directed by your administrator).
   c. (Optional) Select **Optional Fields** to expand advanced configuration options.
6. Under **Interaction Filters**, do one of the following:
   - Select **Handle calls with no campaign or skill** if the assistant should cover unassigned interactions.
   - Choose a **Filter Type: Campaigns**, **Skills**, or **Agents**. Assistants can use only one filter type at a time.
7. Select **Add Campaigns to Assistant** (the button label matches the filter type you chose, for example **Add Skills** to **Assistant** or **Add Agents to Assistant**) to open the selection panel.
8. In the panel, enter three or more characters to search, then select the checkboxes for the campaigns, skills, or agents you want the assistant to transcribe or summarize.

- Items marked with an asterisk (*) are already assigned to another assistant and require a **Variable Filter** to differentiate assignment.
- Selected items appear in a list below the search field. Select the trash can icon next to an item to remove it.

9 (Optional) Define a **Variable Filter** to restrict when the assistant activates within a shared campaign, skill, or agent assignment:

   a Select a **Variable** (for example, QueueName or SkillID).

   b Choose a **Type** (string, number, or boolean).

   c Set a **Comparator** and a value to determine when the assistant applies.

10 Under **Redaction**, select a policy from the dropdown, or leave it set to **None**. The dropdown lists **None** plus any redaction policies already created in the Transcription Settings panel, including the legacy **Swear Word Redaction** and **Both Redactions** options if configured. Select **the Transcription Settings panel** link in the banner below the dropdown to create and manage redaction policies.

11 Select **Save**. This completes assistant configuration.

12 From the **Assistants** list, select the assistant you just created.

13 Select **Rule Engine** from the navigation menu, then select the **Summary** tab. The **Summary** tab in the Rule Engine lets you enable and customize summaries for each channel.

- (Optional) Toggle **Different Settings Per Channel** to create unique summary configurations for **Voice** and **Chat**.

  > **Note:** To make the Chat option available, you must keep the agentassist-by-channels permission for the task list library and the media channel "chat." If this permission is removed, the Chat option won't appear for the customer.

- Under **Context Passing**, toggle **Enable Context Passing** to display a previous call summary to the agent.
  - Select **Show Agent Previous Call Summary** to include the prior summary if the previous call occurred within the specified number of days.

    - Select a **Prompt** from the dropdown list (for example, Five9 Default Summary).

  - Under **Post Interaction Summary**, verify the appropriate **Prompt** is selected for the after-call summary.

14 Select **Save**.

Agent Assist Studio Task Lists

You can display task lists for agents to complete when a defined event occurs during the conversation. You can only assign one task list to an assistant (see **Working with assistants**).

Select the **Task Lists** tab to configure and view task lists.

The task list card displays the list name and description, list status (for example, Active displays when the task list is available to display to agents), and associated campaigns/skills.

Task lists have two states:

- **Triggered**: The call event occurred (for example, `call_accepted`).
- **Fulfilled**: The task list is complete.

  The task list displays in Agent Assist until the agent checks all tasks or the conversation ends.

Creating Task Lists

1. Select **Create**.

   The New Task List window displays. As you create the task items, a preview displays in the right pane.

2. Enter a name and description to display on the card.

3. Select the pane and position to display the card.

   Task list cards can display at the top or bottom of the Guidance or Summary pane.

4 Select a campaign to associate with the task list.

The agent must make a call using one of the campaign IDs to display the task list.

5 Select **Add Task**.

The Editing Task window displays.

6 Complete these fields:

- **Name**: Name to include in reports.
- **Text**: Task item the agent must complete.
- **Type**: Positive tasks appear in green and negative tasks in red.
- **Show Task on Event**: The task list displays to agents when this event occurs.
- **Complete Task on Event**: Task list validation begins on this event.

7 Select **Save Task**.

8 Repeat the above steps to add task items to the list.

> **Note:** Keep lists small to save space and ensure that agents can complete the list.

9 Select **Save Task List** when the task list is ready for use by assistants.

Editing Task Lists

Select the edit icon on the task list card to edit, add, and delete task list items. Select **Save Task List** when the task list is ready to display to agents.

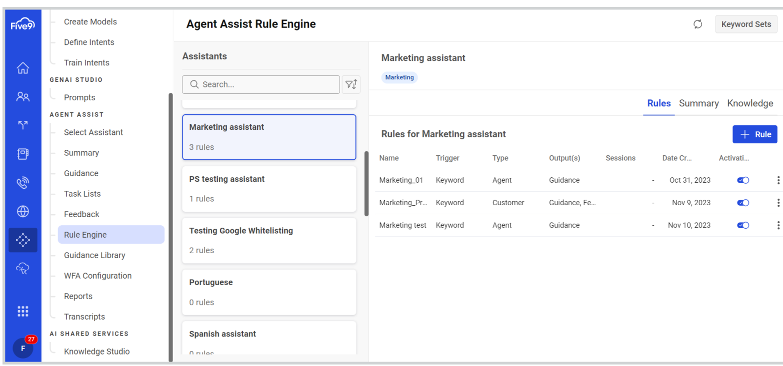
Deleting Task Lists

Select the edit icon on the task list card and select **Delete**.

Agent Assist Studio Rule Engine

Use the **Rule Engine** in Agent Assist Studio to define when and how guidance cards, task lists, and notes display to agents. Rules combine a **trigger** (an event that occurs during a conversation) with one or more **actions** (what Agent Assist should do when that event occurs).

> **Note**
> Many rule triggers rely on keywords to activate guidance cards, task lists, or notes. Before creating a rule that uses the Keyword trigger type, ensure you have created at least one keyword set. For details, see Agent Assist Studio Keyword Sets.



Creating a rule

1. In the **Rule Engine** tab, select the assistant you want to configure.
2. Select **+ Rule** in the upper-right corner.
3. In the **Name your new rule** window, enter a descriptive name for the rule, and select **Continue.**
4. The **Rule configuration page** opens, where you define the trigger and actions.
5. Choose the **trigger** that starts your rule. The available triggers are:
    - **Keyword** – Fires when the system detects a keyword or phrase from a defined keyword set.
    - **Intent** – Fires when an intent from the assistant's model is identified.

- ◦ **Call Start (Voice)** – Fires at the start of a voice call.
- ◦ **Call End (Voice)** – Fires when a voice call ends.

6 Define the **actions** that occur after the trigger. You can enable one or more outputs.

- ◦ **Start Task List**
  - – Select a task list from your library to display when the trigger occurs.
- ◦ **Show Guidance Card**
  - – Select a guidance card from your library or select + to create one.
  - – The guidance card displays to the agent when the trigger event occurs.
  - – **Advanced Configuration**
    - – **Group:** Specify a group name to control the behavior of rules with the same trigger. This allows guidance cards to replace each other or coexist. If multiple guidance cards are in the same group, a new card from that group will replace an existing one. Different group values can be used to achieve desired outcomes, such as replacing specific guidance cards or showing multiple cards simultaneously.
    - – **Delay:** Set a delay in seconds before the guidance card is displayed to the agent. This is an optional setting.
    - – **Campaigns:** Control the visibility of the guidance card based on the campaign:
      - – **Show for All Campaigns:** The guidance card will be shown to agents in all campaigns.
      - – **Show for Only Certain Campaigns:** You can select specific campaigns where this guidance card will be active.
    - – **Variables:** Define conditions based on variables to control when the guidance card is shown. You need to specify the variable, data type, comparator (e.g., `EQUALS`, `CONTAINS`), and the value to compare against.

- **Take a Quick Note**
  - Enter a note or question to display when the trigger activates.
  - Under **Advanced Configuration**, choose whether the note applies to:
    - **All Campaigns**, or
    - **Only Certain Campaigns**.
- **Collect Agent Feedback**
  - Displays a feedback input box in Agent Assist, allowing agents to record feedback related to the event.

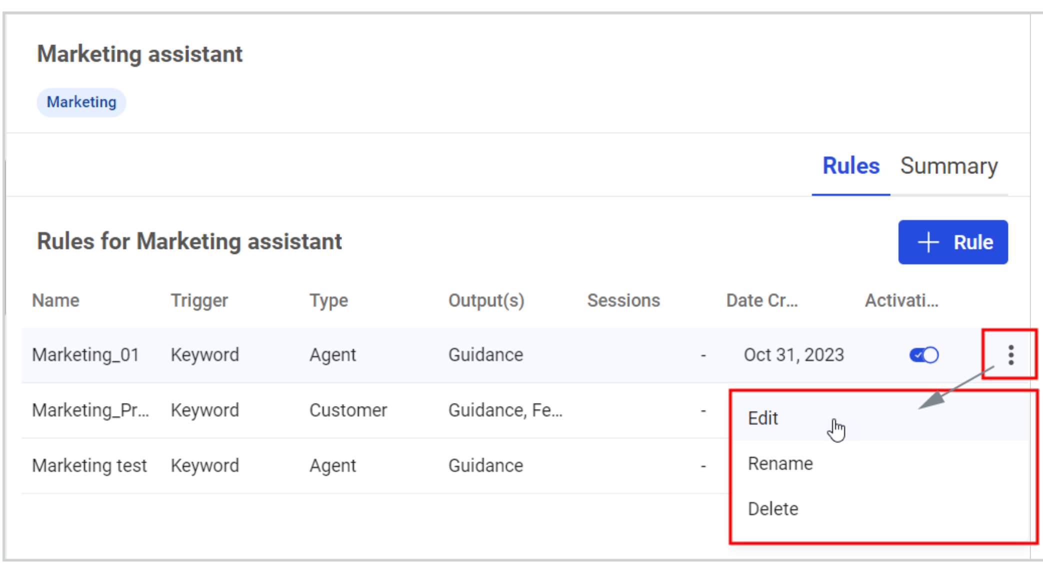
7 Toggle **Active** in the upper-right corner to enable the rule.

8 Select **Create Rule** to save it.

9 The rule appears in the **Rules** list for the selected assistant.

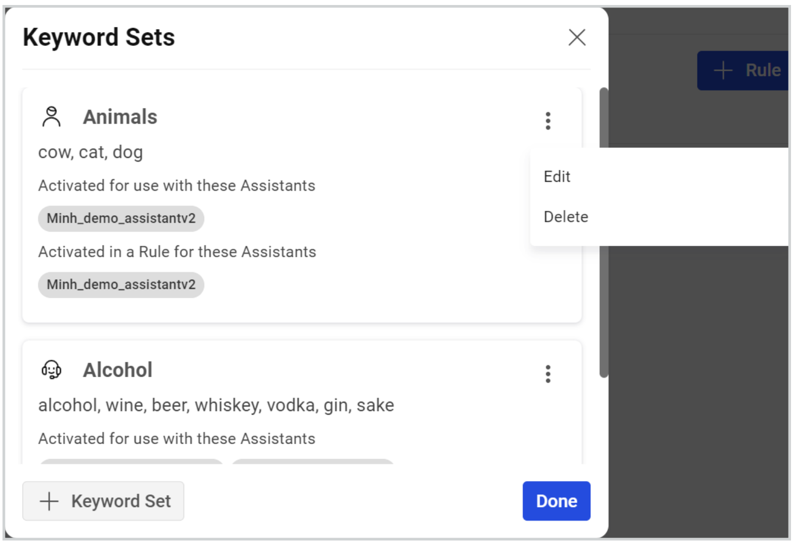
Managing rules

You can select the **Edit**, **Rename**, or **Delete** options from the shortcut menu on the rule.



Agent Assist Studio Keyword Sets

Keyword sets define the words or short phrases that the Natural Language Processing (NLP) engine detects during a call. When the NLP recognizes a keyword, it can trigger guidance cards or other rule actions. Use keyword sets to group related keywords so they can be reused across multiple rules.



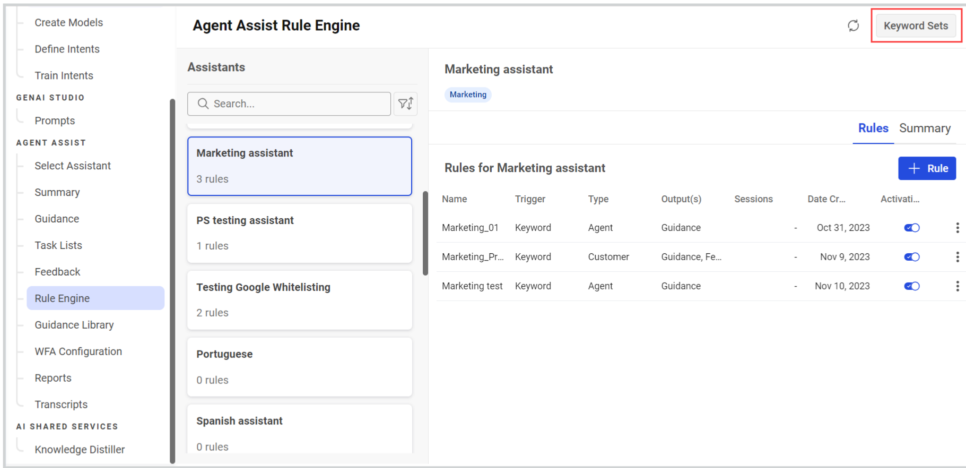
Creating Keyword Sets

1 In the navigation menu, select **Rule Engine.**

2 Select **Keyword Sets**.

The Keyword Sets page opens.

> **Note:** You can also create keyword sets while configuring a rule.



3 Select **Add Keyword Set.**

The Create New Keyword Set window opens.

4 Enter a **name** for the keyword set.

5 Select one or more **Assistants**.

Associating Assistants makes the keyword set available when you create rules for those Assistants.

6 Select the **speaker** for keyword detection:

- **Caller** — The NLP analyzes the inbound customer audio.
- **Agent** — The NLP analyzes the outbound agent audio.

7 Enter the keywords or phrases to detect.

- Separate items with a comma and a space.
- You can use phrases that include up to three words.
- You only need one variation of a word. For example, enter the word “walk” and the NLP will recognize all variations (walks, walked, walking).

8 Select **Save**.

AI Knowledge in Agent Assist Studio

AI Knowledge is a collection of corporate knowledge files (*sources*) made available to agents and intelligent virtual agents (IVAs) to provide more content about a topic in an interaction.

Your Five9 administrator uploads knowledge sources to the system using Five9 AI Knowledge and creates prompts in Five9 GenAI Studio. See AI Knowledge Studio Adminstrator's Guide and GenAI Studio Adminstrator's Guide.

Enabling AI Knowledge

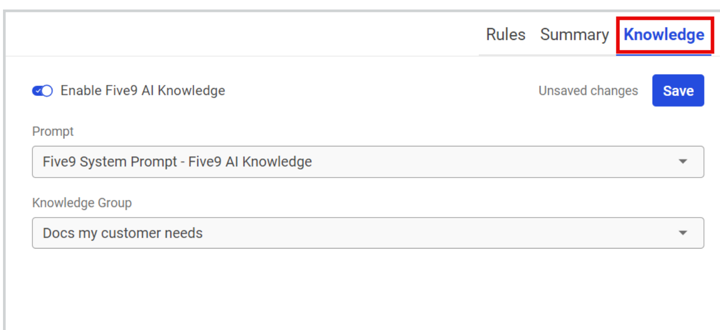
To enable AI Knowledge in Agent Assist:

1 Select **Rule Engine** in the navigation menu.

2 Select the **Assistant** requiring access to knowledge sources.

The Rules workspace displays configured rules for the assistant.

3 Select the **Knowledge** tab.



4 Toggle **Enable Five9 AI Knowledge** on.

5 Select the **Prompt** and **Knowledge Group** to apply to the assistant from the dropdown menus.

Prompts allow agents and IVAs to interact with the Five9 AI system by providing instructions or queries to receive a specific response. Knowledge groups are collections of corporate knowledge sources that Five9 AI Knowledge uses to generate custom answers that align with your brand's voice and best practices.

Selected items are bold in the dropdown menu.

6 Select **Save**.

Agent Assist Studio Summary

Summaries provide agents with real-time updates about conversation actions or events. These statements help agents track what has occurred during the call and ensure key moments are captured for post-call analysis. You can customize summaries by campaign and configure them separately for each channel.

Enabling summaries

1. Select **Rule Engine** from the navigation menu.
2. In the **Assistants** workspace, select the assistant you want to configure.

   The selected assistant displays at the top of the **Rules** workspace.
3. Select the **Summary** tab.
4. (Optional) Toggle **Different Settings Per Channel** to configure summaries separately for **Voice** and **Chat**.

   > **Note**
   >
   > To make the **Chat** option available, you must keep the `agentassist-by-channels` permission for the task list library and the media channel “chat.” If this permission is removed, the **Chat** option will not appear for the customer.

5. Choose a channel tab (**Voice** or **Chat**).
6. To generate a final recap after the call, turn on **Enabled AA Summaries** under **Post Interaction Summary**.
   - Select a **Prompt** from the drop-down list to define the content of the final summary.
7. (Optional) Turn on **Context Passing** to display the previous call’s summary to the agent at the start of the next interaction.

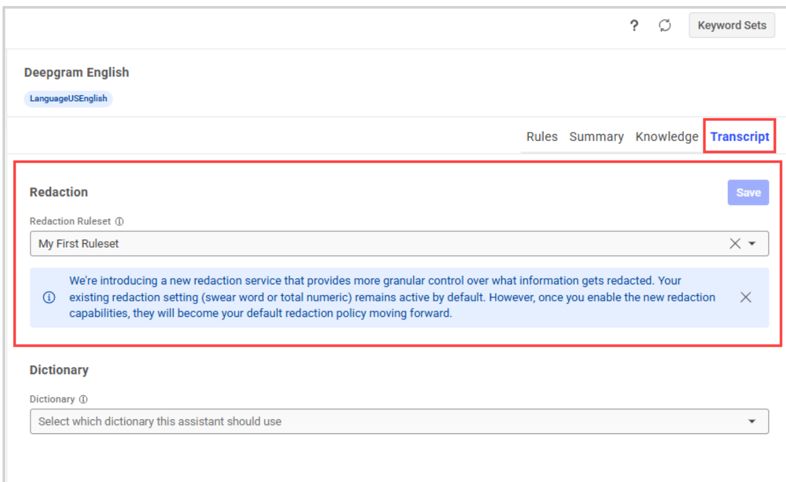
8 Select **Save**.

Agent Assist Studio redaction

Redaction rulesets control what sensitive information the system removes from transcripts. By default, the system redacts profanity and numeric values. You can assign a custom ruleset to override the defaults and apply more granular redaction policies.

Important

Five9 currently applies default redaction to PCI and PII for compliance. Phone numbers and similar PII being redacted is expected. We recognize that some customers may want PII to remain visible and are working on an option to support that in early Q2. PCI will continue to be redacted by default because Five9 cannot store PCI data.



Redaction timing

Five9 supports two types of transcript redaction:

- **During Interaction:** Redacts transcripts in real time while the interaction is active.
- **Post Interaction:** Redacts transcripts after the interaction is complete.

Choose the timing option that best aligns with your compliance requirements.

Assign a Redaction Ruleset

1. Select the **Manage Artificial Intelligence** icon or **Rule Engine** in the Agent Assist section of the navigation menu.
2. Select the **Transcript** tab.
3. In the **Redaction Ruleset** field, open the drop-down list.
4. Select the ruleset you want the assistant to use.
5. Select **Save**.

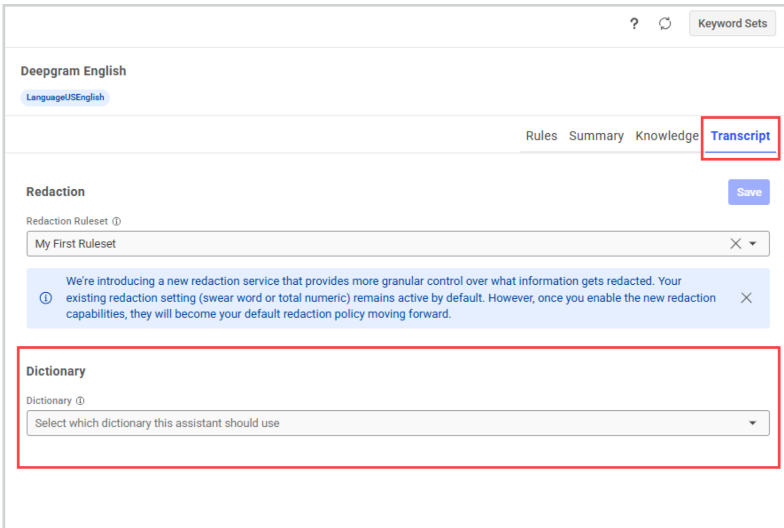
Important

Creating a redaction policy does not automatically apply it to the assistant. You must assign the policy through one of the following locations:

- **AI Insights > Dashboards > View Dashboard > Settings > Advanced Settings**
- **Agent Assist > Rule Engine > Transcript**

Agent Assist Studio dictionaries

Dictionaries define custom terms that the system should recognize and process during transcription. Assigning a dictionary improves accuracy and consistency across transcripts.



Assign a dictionary

1. Select the **Manage Artificial Intelligence** icon or **Rule Engine** in the Agent Assist section of the navigation menu.
2. Select the **Transcript** tab.
3. In the **Dictionary** field, open the drop-down list.
4. Select the dictionary you want the assistant to use.
5. Select **Save**.

Considerations

- You must create dictionaries in AI Transcription Administrator's Guide before assigning them here.

Agent Assist Studio guidance cards

Guidance cards display when specific conversation triggers or intents occur. They provide talking points, next-step recommendations, or compliance reminders to help agents respond appropriately. Each card can be configured for voice or digital channels and associated with particular campaigns or assistants.

Creating guidance cards

Guidance cards appear to agents automatically when specific conversation events or triggers occur. They provide real-time talking points, coaching tips, or suggested responses to help guide the interaction. You can create reusable guidance cards that display during both voice and chat sessions, tailoring the content for each channel or using the same version across all channels.

1. In the **Agent Assist** menu, select **Guidance Library**.
2. Select **Create Guidance Card** (+).
3. Enter a name for the card.
4. (Optional) Toggle **Different Settings Per Channel** to create unique versions for **Voice** and **Chat**.

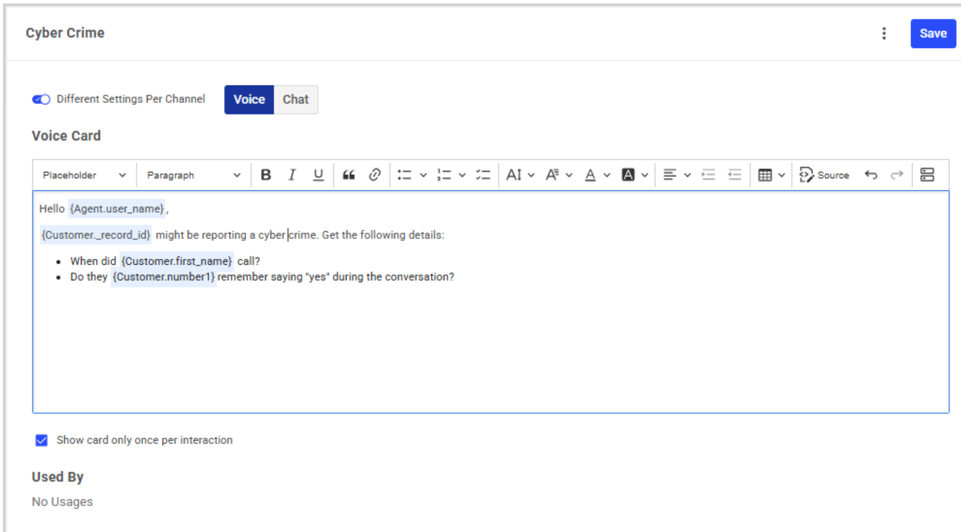
   > **Note**
   >
   > To make the **Chat** option available, you must keep the `agentassist-by-channels` permission for the task list library and the media channel "chat." If this permission is removed, the **Chat** option will not appear for the customer.

   - When the toggle is **off**, the same card content applies to all channels.
   - When the toggle is **on**, select the **Voice** or **Chat** tab to edit each version separately.
5. Enter the body text for the card.

   > **Note:** Images must reside on a public server.

6. Select variables from the **Placeholder** menu to autofill the card with Call Attached Variables (CAV) from VCC.

Example: `{Agent.user_name}` automatically displays the agent's name on the guidance card.



7 (Optional) Select **Show card only once per interaction** if you want the card to appear just once per session.

8 Select **Save**.

The new guidance card appears in the **Guidance Library** list and can now be used in rules or assigned to an assistant.

9 Continue to associate campaigns with cards and set the events that trigger cards to display.

Managing guidance cards

To modify an existing guidance card, return to the **Guidance Library**.

1 Select the guidance card you want to update.

2 Edit the content as needed, then select **Save**.

3 To rename or delete a card, select the **More Options (⋮)** menu next to the card name, and choose **Rename** or **Delete**.

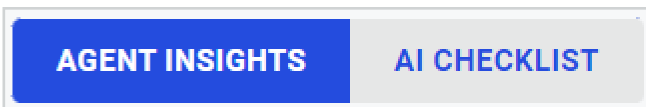
> **Note**
> Deleting a guidance card removes it from all assistants and rules where it was previously used.

Working with reports and dashboards

The Reports page provides critical reporting and metrics for monitoring and optimizing your contact center. These metrics allow you to explore insights, such as:

- Creating, training, and deploying AI models.
- Agent performance and customer engagement.
- Contact center trends and potential issues.

Select the **Agent Insights/AI Tasks Lists** button to display dashboards with metrics for agents or dashboards with metrics for how agents completed AI task lists (see **Configuring Task Lists**).



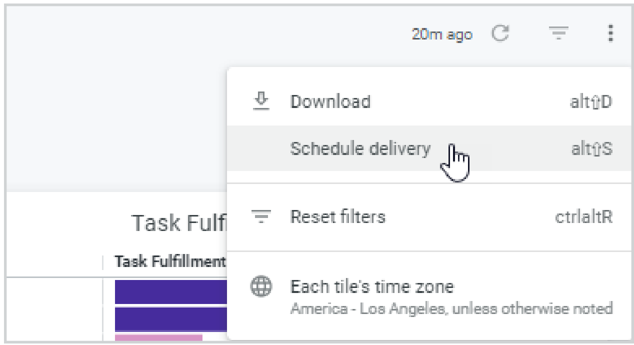
The **Dashboards action** menu (three vertical dots) provides the following options:

- Download page metrics as a PDF or CSV file, or open them in a separate browser window.
- Schedule delivery of reports in PDF, CSV, or PNG format (see **Scheduling reports**).
- Reset all filters.

Scheduling reports
Working with agent insights dashboards
Working with AI task lists dashboards

Scheduling reports

1 Select the **Dashboards actions** menu (three vertical dots) at the top of the page and select **Schedule delivery**.



The Schedule window displays.

2 Complete the following fields on the **Settings** tab.

- **Schedule Name**: Name of the scheduled report.

  Recurrence: How often to send the report.

- **Destination**: How to send the report. Currently Email is the only available option.

- **Email addresses**: Where to send the report. Click Enter when you complete an address to begin typing a new entry.

- **Format**: What file format to use for the report (PDF, CSV, or PNG).

3 Select the **Filters** tab to refine the report.

4 Select the **Advanced options** tab to include a message and links to dashboard metric views, expand tables in the report, arrange tiles as a single column in the report, select a paper size for printing, and set the timezone for message delivery.

5 Select **Test now** to send an example report to all listed emails.

6 Select **Save**.

Working with agent insights dashboards

These dashboards provide insight into agent activities in your call center.

Filters

Use the following filters the top of the page to refine dashboard metrics:

- **Date Range**: Date range for the calls to display.
- **Agent Name**: Exact name of the agent who handled the calls to display.

  > **Note:** This must be spelled the same as it is in the Five9 Admin Console.

- **Campaign Name**: The campaign for the calls to display.
- **Number of Intents**: The number of intents to display in the top and bottom intents dashboards.

  > **Note:** This filter is required.

You can also select elements in the dashboards to add those items to the filter set, and Ctrl+click (multi-select) these items to add them as a group to the filter set.

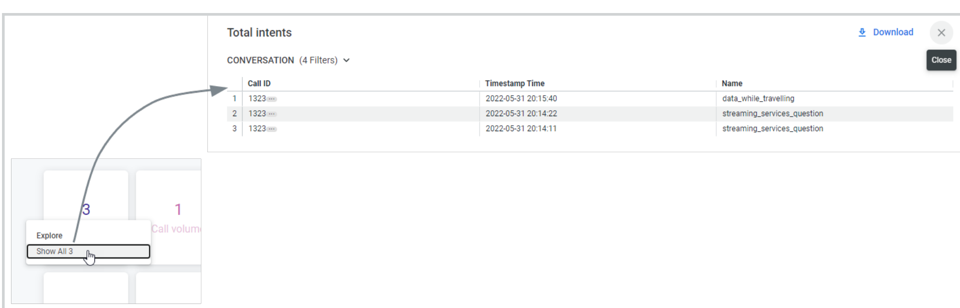
Select the reload button after changing filter options or adding items to the filter set to update the page.

Insights tiles

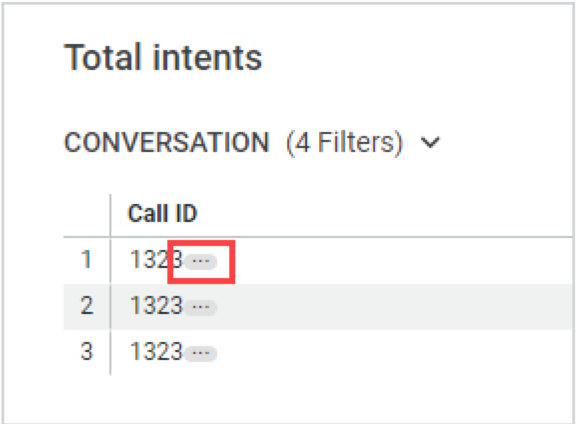
The top-tier tiles provide these high-level insights about your contact center:

- **Total intents**: The number of intents detected by Agent Assist.

  Right-click the number link and select **Show All** to display a list (maximum of 500 rows) of these intents.



- **Call ID**: Select the ellipses to view the call transcript.



- **Name**: Select the name and select **Drill intent** to display a chart of metrics for that intent over time. Select the trend line in the graph to display call details for that intent.

- **Call volume**: The number of completed calls using Agent Assist.

  Right-click the link and select **Show All** to display a list (maximum of 500 rows) of calls, including the Call ID, Call Duration, After Call Work Time, and Total Intent Counts.

  Select the ellipses to view the call transcript. Select a **Total Intents Counts** bar and select **Drill intent** to view a graph of conversation intents. Select the **Intent Name** to display a graph of intents for those Call IDs.

- **Unique agent users**: The number of Agent Assist users who have received or placed calls.

  Right-click the link and select **Show All** to display a list (maximum of 500 rows) of agents and their employee ID.

- **Calls with Feedback**: The number of Agent Assist calls with customer feedback.

  Right-click the link and select **Show All** to display a list (maximum of 500 rows) of calls with feedback, including the Call ID, agent name, and feedback text.

- **Intents/Call**: The average number of detected intents per call.

- **Guidance/Call**: The average number of guidance cards presented per call.

- **Calls with 0 summary**: The number of calls that ended without generating summaries.

- **Calls with intents**: The percentage of calls where a minimum of one intent is detected.
- **Average Handle Time (AHT)**: The average length of an Agent Assist call.

  Right-click the link and select **Show All** to display a list (maximum of 500 rows) of calls by AHT. Select a **Calls Duration Count** bar to display a list of Call IDs, and the Call Duration and After Call Work Time (ACW) that make up the total AHT score.
- **Guidance Score**: The overall rating of guidance cards based on agent ratings.

  Right-click the link and select **Show All** to display a list (maximum of 500 rows) of guidance cards, their average card rating, number of positive feedback responses, and number of negative feedback responses. Select a table column to add that value to the filters.

Dashboards

Below the Intents Tiles are dashboards that display insights on the following:

- **Intent trends**: Displays customer/agent intents that were triggered most often on a particular day. This allows you to identify trends in intents and possible outliers (for example, the number of calls containing the “package tracking” intent that occurred on Jan. 28, which will highlight possible shipping disruptions).
- **Top/Bottom Spoken Customer/Agent Intents**: Allows you to identify intents that occur most frequently. Use the Number of Intents filter to refine results. These results allows you to identify automation opportunities (such as, automating package tracking using IVA).
- **Top 10 Guidance**: The guidance cards being shown to agents most frequently.
- **Top 10 Campaigns**: The campaigns receiving the highest call volume.
- **Active Daily Users**: The daily trend of Agent Assist users.
- **Intents**: The distribution of the number of intents across calls.

  For the next three dashboards, you can drag your mouse horizontally across this chart to filter it by a time range.
- **AHT Trend**: AHT over time.

- **After-call Work**: After-call work over time.
- **Calls Volume**: Call volume over time.
- **Top 10 Summaries added/deleted by Agent**: This allows you to view the most frequently added and deleted summaries by the agents. Use the added summaries to identify summary cards that are not being triggered by spoken intents. Use the deleted summaries to identify summary cards that are being erroneously triggered.

Working with AI task lists dashboards

The AI Checklist dashboards provide insight into how agents complete task lists. Use the Recorded Date and Task Name filters to refine dashboard metrics. You can also select elements in the dashboards to add those items to the filter set, and Ctrl+click (multi-select) these items to add them as a group to the filter set.

Task list tiles and graphs

The following lists the tiles and graphs that display on the AI Checklist dashboard:

- **Task Completion**: The percentage of tasks completed/fulfilled by agents.
- **Tasklist Completion Rate**: The percentage of all completed task lists.
- **Skills**: A word-cloud of agent skills with completed task lists.
- **Task Fulfillment**: List of task lists and percentage of fulfillment.

  Select a task list name to filter the dashboard based on the fulfillment threshold of that task. Right-click the link in the Task Fulfillment column and select **Show All** to display a list (maximum of 500 rows) of tasks with their Call ID, task list name, and task fulfillment percentage.
- **Task Fulfillment Time**: The average time agents take to fulfill each task (in seconds).
- **Agent Task Performance**: The average task fulfillment rate by agent.
- **Tasklist Fulfillment**: The trend of task list fulfillment over time.

This allows you to identify trends in fulfillment and possible outliers. For example, a drop in fulfillment for “Package Tracking” on Jan. 10 highlights possible issues agents found with tracking shipments.

- **Fulfillment Distribution**: The percentage of task fulfillment distribution.

  Hover over bars in the graph to display the number of calls and their task list fulfillment rate.

Working with Transcripts in Agent Assist Studio

Select Transcripts in the navigation menu to view and download call transcripts, listen to call recordings, validate AI phrases, review call feedback, and schedule delivery of transcripts to concerned parties.

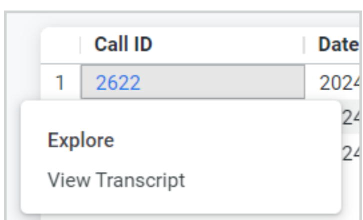
1. Select **Transcripts** from the navigation menu.

   The Transcript Explorer lists calls chronologically.

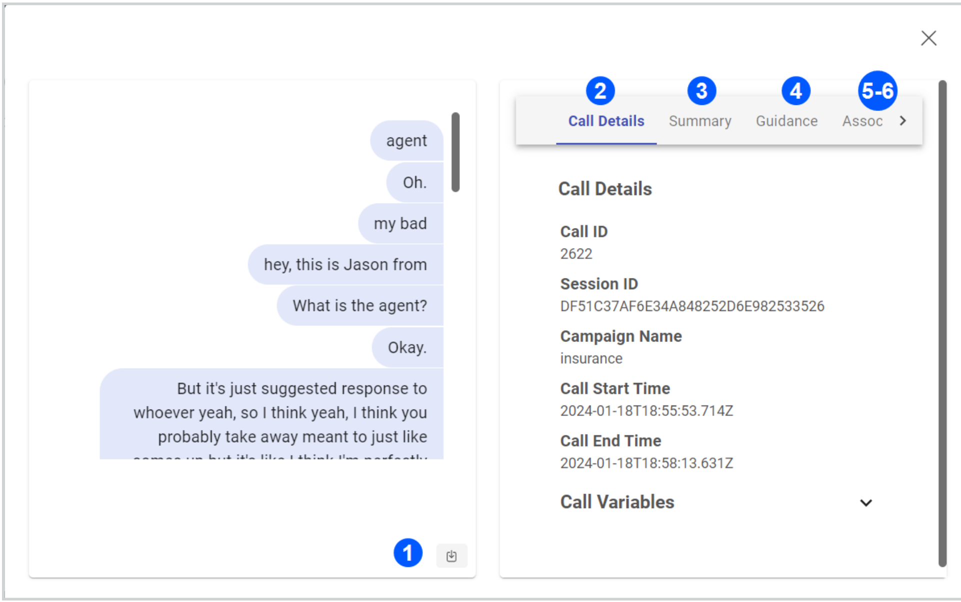
2. Filter the list by selecting values in these dropdown menus:
   - Date Range
   - Call ID
   - Campaign Name
   - Agent Name
   - Contact Number
   - Disposition Name
   - Talk Time
   - Edited Summaries

3. Select the refresh button to apply selected filters.

4. Select the **Call ID** link, and then select **View Transcript**.

   A transcript viewer displays the conversation and tabs for review details of the conversation and troubleshoot AI phrase issues.



1 **Download**: Stores a text file of the conversation in your designated downloads folder.
2 **Call Details**: Displays the call and session IDs, campaign names or skill ID, and attached call variables. These details are helpful for troubleshooting and understanding call context.
3 **Summary**: Displays the call summary. See **Viewing Edited Summaries**.
4 **Guidance**: Displays a list of guidance cards shown during the call.

> **Note**
>
> You must assign the Summary and Guidance workspaces permissions in Five9 Admin Console for the agent for content to display in these workspaces. See .
>
> For more information on assigning permissions, see *Permissions and Permission Sets* in the Administrator Console Administrator's Guide.

5 **Associated Phrases**: Displays the defined intent name and AI model (customer or agent), and the exact phrase spoken during the call. This allows you to review the conversation for AI accuracy.
6 **Feedback**: Displays feedback captured after the call.

> **Note:** You must configure feedback in Agent Assist and assign feedback permissions in Five9 Admin Console for content to display in this workspace. See .

5 Close the transcript viewer to display the Call Details window.

6 (Optional) Select **Scheduled Delivery** and complete the form to send the transcript to concerned parties.

7 Close the Call Details window.

Viewing Edited Summaries

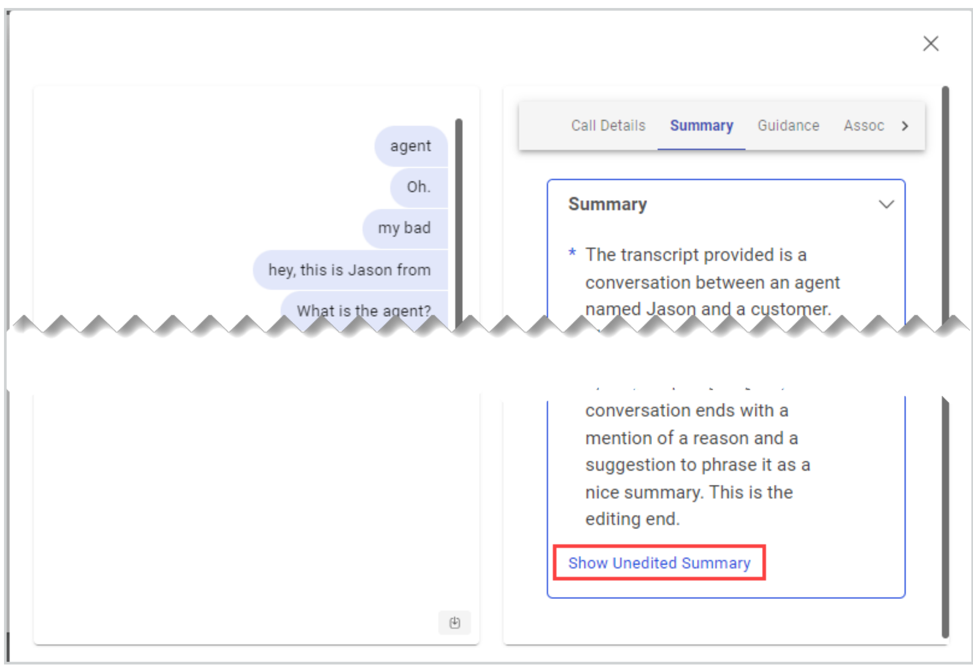
Agents with permissions can edit the summary before setting a disposition for the call (see also,).

To view the unedited transcript for the call:

1 Select the **Edited Summaries** filter in Transcript Explorer and refresh to list only those transcripts.

2 Select the desired **Call ID** and select **View Transcript**.

3 Select the **Summary** tab, scroll to the bottom of the summary workspace, and select **Show Unedited Summary**.



The unedited version displays below the edited version.

Workflow Automation

Five9 Workflow Automation (WFA) allows you to write Agent Assist data to supported third-party CRMs or cloud-storage systems. These are the supported connectors in WFA:

- Salesforce
- ServiceNow
- Microsoft Dynamics 365
- Zendesk
- Google Cloud Storage
- Amazon S3

> **Note:** Contact your Five9 representative if your CRM or storage solution isn't listed.

WFA workflows for Agent Assist can retrieve and write real-time transcripts, after-call AI summaries, and real-time summaries to these systems. Data written to these systems is associated with an object created by the Five9 CTI adapter. For example, in Salesforce, data is normally linked to the related Call Log (a Task object created by the Five9 Salesforce CTI adapter). In Zendesk, a transcript can be associated with a Ticket object.

> **Note:** Google Cloud Storage and Amazon S3 only create data as simple files, and so the Five9 CTI adapter can't create an object for that data.

In the WFA workflow:

- A real-time transcript may be HTML created from a Mustache template and saved as a PDF linked to a call record.
- After-call AI summaries and real-time summaries may be plain text created from a Mustache template and saved in a text field on the CTI call record.

For more information on WFA terminology and workflows, see Workflow Automation Guide.

WFA provisioning
WFA Reactions

WFA provisioning

Contact your Five9 representative to make a Five9 Provision Request to access WFA. You then receive an activation email. **You must respond to this email within 24 hours.**

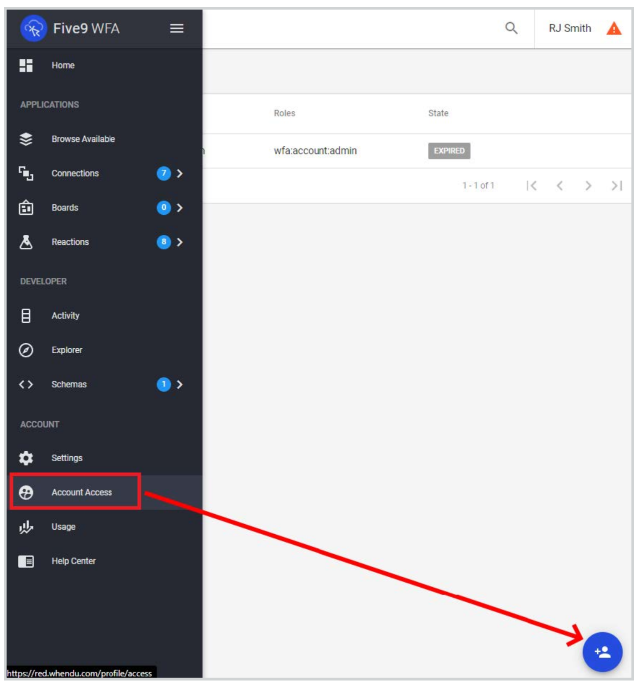
After you have access to your WFA account, you must allow your Five9 representative admin permissions to this environment.

To provide them access:

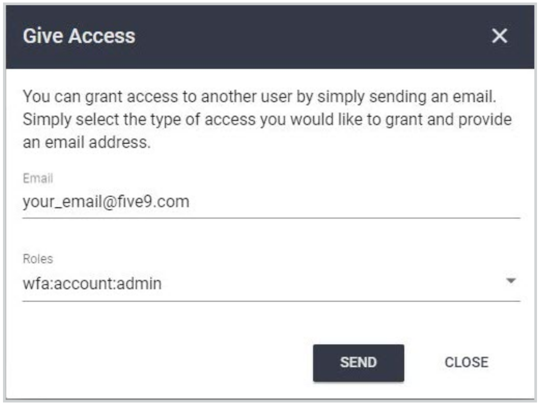
1 Log in to WFA either through your normal URL or by selecting the Workflow card in Five9 Admin Console.

> **Note:** You must have admin privileges.

2 Select **Account Access** and select the **Give Access** button.



The Give Access window displays.



3 Enter your Five9 representative's email address and give them the `wfa:account:admin` role.

4 Select **Send**.

Your Five9 representative connects WFA to your Agent Assist Studio environment and CRM or cloud-storage system, and builds an initial WFA reaction. For information on using WFA to build workflows for your environment, see Workflow Automation Guide.

> **Note:** Contact your Five9 representative to learn more about connecting Agent Assist with WFA in your environment.

WFA Reactions

After your Five9 representative connects WFA to your Agent Assist Studio environment and CRM or cloud-storage system, they build an initial WFA reaction.

> **Note:** For information on using WFA to build workflows for your environment, see Workflow Automation Guide.

You can create your own reactions on the **Reactions** page. Before you create a reaction, decide on the trigger — an event or conditions to meet. This is **WHEN** the selected event occurs. You can add as many actions, **DU**, as your connected technologies can execute. You can also use fields created in the reaction **DU** blocks as context for key-value pairs in other actions in the reaction.

> **Note:** For definitions of **WHEN** triggers and **DU** actions, and instructions on creating WFA workflows, see Creating Reactions in the Workflow Automation Guide.

Any reaction that you create displays in the **Reactions** tab where you toggle reactions on and off, delete selected reactions, and use the New Reaction Step Wizard to edit or view reactions. You can also choose from built-in reactions in the WFA Solution Catalog that allow you to send transcripts and summaries to Salesforce, ZenDesk, ServiceNow, or SFTP.