Customer Issue Resolver Agent – User Manual

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Date: January 10, 2026

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1. Introduction

The **Customer Issue Resolver Agent** is an advanced AI-driven automation designed to act as a triage specialist for customer support. It leverages the power of Automation Anywhere to parse incoming emails, categorize them with high precision, and execute appropriate resolution workflows using integrated enterprise tools.

This manual provides a comprehensive guide to the agent's purpose, architecture, and operational workflows, ensuring a clear understanding for both technical and business stakeholders.

2. Problem Statement

In high-volume support environments, manual triage of emails is time-consuming and prone to errors. Support teams often struggle to:

- Quickly distinguish between internal IT issues, payment disputes, and external client inquiries.
- Consistently meet strict one-business-day Service Level Agreements (SLAs).
- Maintain a uniform, empathetic tone in all communications.
- efficiently retrieve historical resolutions from knowledge bases.
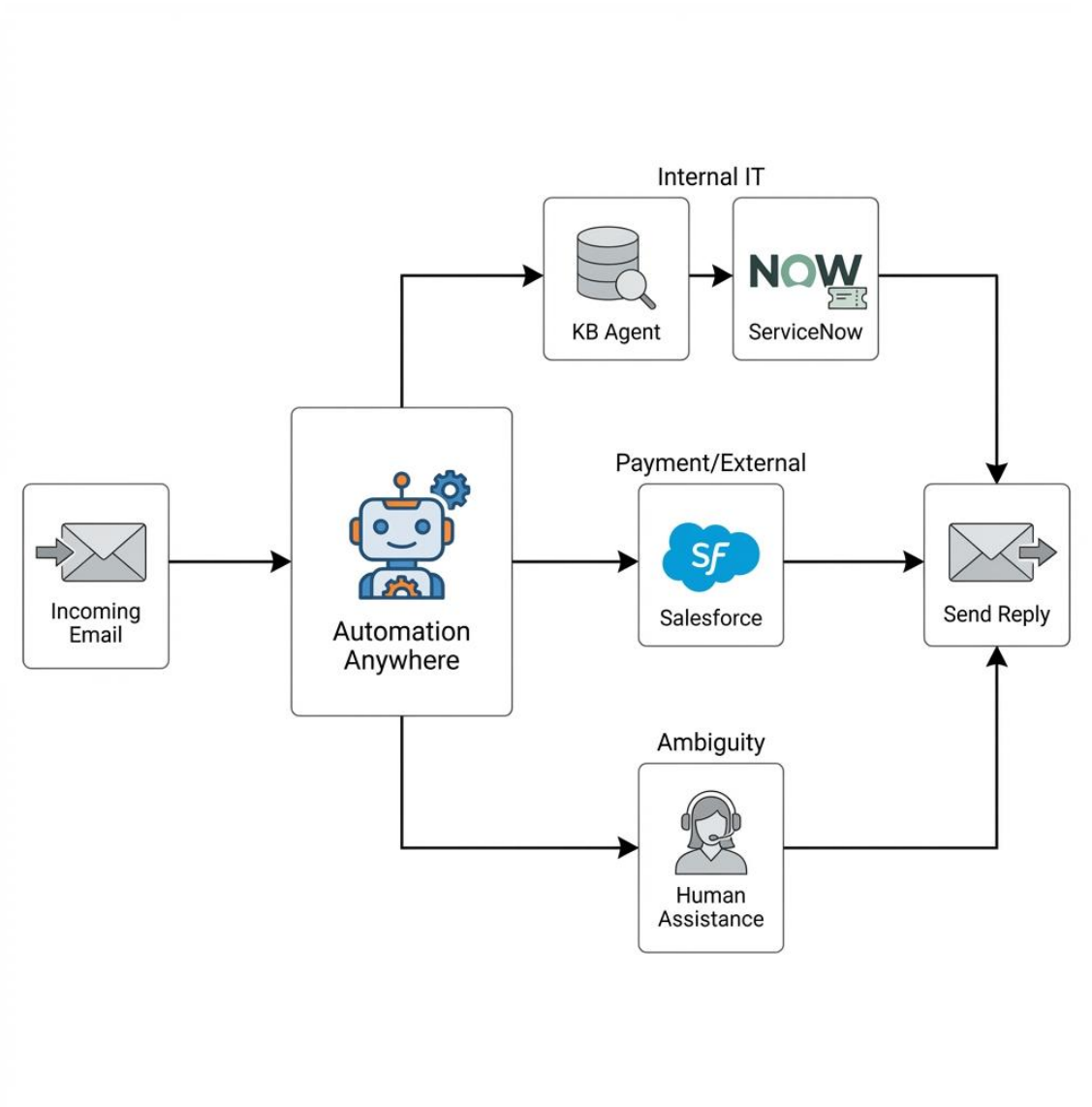
3. Solution Overview

The Customer Issue Resolver Agent automates the entire triage and first-response process.

Key Capabilities:

- **Automated Email Parsing:** Instantly reads and interprets email content.
- **Intelligent Categorization:** Classifies issues into Internal IT, Payment, or External Client buckets.
- **System Integration:** Seamlessly interacts with ServiceNow, Salesforce, and Knowledge Base (KB) agents.
- **Human-in-the-Loop:** Intelligently routes ambiguous cases to human agents for clarification.
- **Auto-Response:** Drafts and sends professional, empathetic replies with resolution details.

4. Technical Architecture

4.1. Process Infographic

4.2. High-Level Component Interaction

The following diagram illustrates the high-level technical components and their interactions.

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```
graph TD
    User([User Email]) -->|Trigger| AA[Automation Anywhere Agent]

    subgraph "Core Orchestration"
        AA -->|Analyze Content| Logic{Categorization Logic}
    end

    subgraph "Integrations"
        Logic -->|Internal IT| KB[KB Agent]
```

```
    Logic -->|Internal IT (Unresolved)| SN[ServiceNow API]
    Logic -->|Payment/External| SF[Salesforce API]
    Logic -->|Ambiguous| Human[Human Assistance Tool]
end

KB -->|Resolution Found| AA
SN -->|Ticket Created| AA
SF -->|Case Created| AA
Human -->|Clarification| AA

AA -->|Draft & Send Reply| User
```
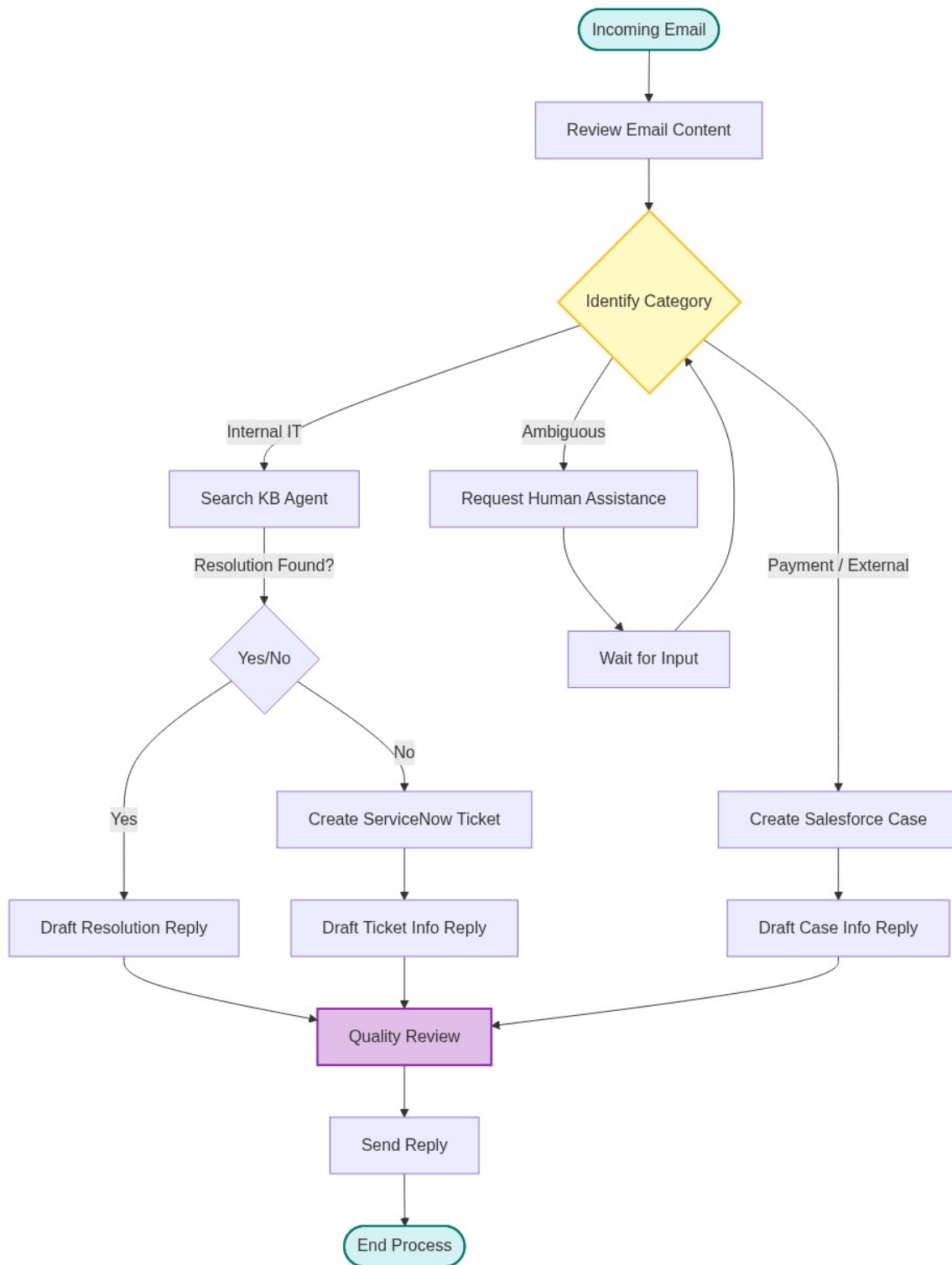
5. Visual Process Workflow

This visual guide demonstrates the step-by-step logical flow handling each email.

```
                          ┌─────────────────┐
                          │ Incoming Email  │
                          └─────────────────┘
                                   │
                                   ▼
                        ┌────────────────────┐
                        │ Review Email Content│
                        └────────────────────┘
                                   │
                                   ▼
                            ◇ Identify Category ◇
```

Identify Category → Internal IT → Search KB Agent

Identify Category → Ambiguous → Request Human Assistance

Identify Category → Payment / External → Create Salesforce Case

Search KB Agent → Resolution Found? → Yes/No

Yes/No → Yes → Draft Resolution Reply

Yes/No → No → Create ServiceNow Ticket → Draft Ticket Info Reply

Request Human Assistance → Wait for Input → Identify Category

Create Salesforce Case → Draft Case Info Reply

Draft Resolution Reply → Quality Review

Draft Ticket Info Reply → Quality Review

Draft Case Info Reply → Quality Review

Quality Review → Send Reply → End Process

6. Detailed Process Description

Phase 1: Review & Categorize

The agent scans the email body for keywords and context.

- **Key Indicators**:
- - "Login failed", "VPN issue", "System error" -> **Internal IT**
- - "Invoice", "Credit Card", "Refund" -> **Payment**
- - "Product inquiry", "Service outage" -> **External Client**

Phase 2: Execution & Integration

- **Internal IT Actions**:

  1. **KB Search**: Queries the Knowledge Base. If a fix is found, it is sent immediately.

  2. **ServiceNow**: If no KB article exists, a ticket is created (e.g., INC12345) and routed to Level 2 support.

- **Payment/External Actions**:

  1. **Salesforce**: A case is automatically created (e.g., CASE98765) for the appropriate department.
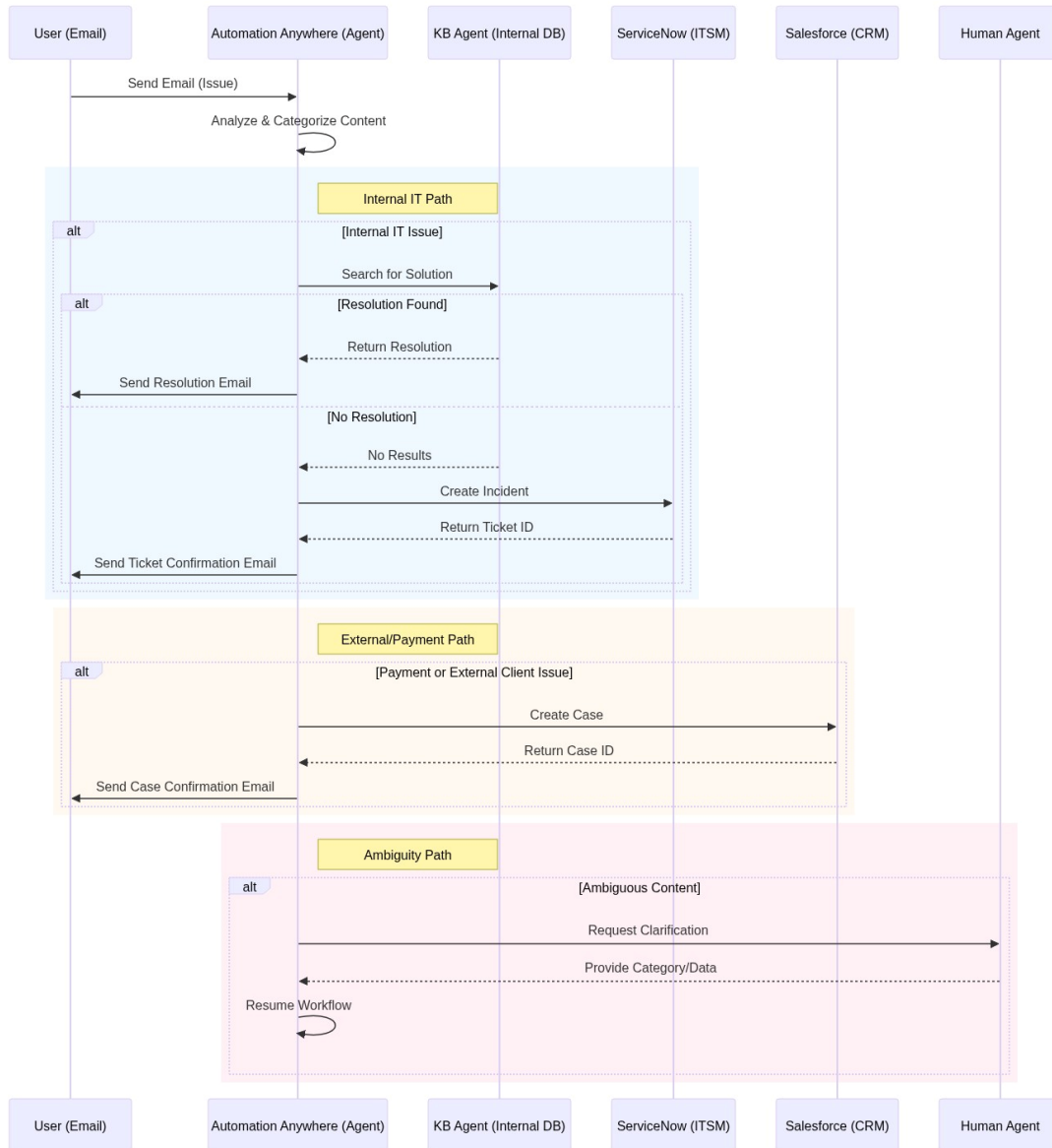
Phase 3: Communication

All replies are generated using a pre-defined "Empathetic Professional" tone. The agent ensures:

- Reference numbers (Ticket ID, Case ID) are included.
- Sensitive data is scrubbed.
- Next steps are clearly defined.

7. UML Sequence Diagram

The following sequence diagram provides a detailed technical view of the object interactions.

8. Guidelines & SLAs

| Requirement | Description |

| :--- | :--- |

| **SLA** | All emails must be processed and replied to within **1 Business Day**. |

| **Tone** | Professional, Empathetic, Solution-Focused. |

| **Security** | No sensitive internal data (passwords, PII) in replies. |

| **Ambiguity** | "When in doubt, ask." Use the Human Assistance Tool. |