

CUSTOMER SERVICE

STANDARD OPERATING PROCEDURES

Version 4

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CS Flowchart	2
CS Agent Tasks	2
Support for CS Agents	2
I. Tag (Zendesk)	3
II. Track (Google Form)	3
III. Label (GMail)	3
Level Needs Procedures	4
Account Maintenance	4
Unable to Access Account	4
GDPR Request - DELETE RECORD Request	4
Dispute	5
Dispute - New Dispute	5
Dispute - Dispute Inquiry	6
Dispute - Dispute_Update Notif	7
Billing	8
Billing - Free Trial Inquiry	8
Billing - Refund Request	8
Billing - Refund Request (Lost Resume)	9
Billing - Subscription Issue	9
Billing - Unwanted Charges (other sites)	10
Billing Issue - Plan Expired	10
Tech Issue	10
Cannot Download - (Empty Space/Blank Space)	11
Cannot Download (Different Template downloaded)	11
Downloaded - Incorrect Format	12
Downloaded - Incorrect Format (Docx)	12
Downloaded - Incorrect Format (PDF)	12
Lost Resume	13
Lost Resume (After signup)	13
Lost Resume (Progress not saved)	13
Lost Resume (After signup)	14
Lost Resume (User Stated they Saved)	14
Cancellation	14
Cancellation - Claim to Cancel Prior	14
Cancellation - No Refund	15
Customer Complaints	15
Customer Complaints - Bad Review	15
Customer Complaints - Escalation Threats (Unwanted Charges)	15
Customer Complaints - Irate Customers	16
Customer Complaints - Irate Customers (Lost Resume)	16
Grasshopper	17
How-To-Walk-Through	18
Others	18
Others - Discount code	18
Others - Job Search	19
Others - Spam	19
Others - Linkbait	19
Others - Test	19
Others - Feature Suggestion/ Contact Feedback	20
Others - Trustpilot/SiteJabber	20
Issue Unclear	21
Zendesk Issue - email only	21

CS Flowchart

CS Agent Tasks

1. Manage Inquiries
 - Respond to user inquiries
 - Escalate concerns as needed.
 - Review Tickets and Follow-up with user/s whenever necessary.
2. Process Subscription Cancellation/s
3. Process / Escalate Refund Requests
4. Track and Document Interactions via Zendesk.
5. Track and Document Trustpilot Reviews
6. Create and/or Send Walkthroughs via Tango, whenever needed.
7. Report unique technical concerns to the Operations Manager.
8. Inquiry and/or App Performance Insights
9. Meet KPI Targets
10. Tasks assigned by your supervisor/s.

Support for CS Agents

1. RB Daily Logs
2. Standard Operating Procedures File
3. Zendesk Macros for Response Templates
4. RB Response Templates (for Tech Issues)
5. Customer Service Manual 2024
6. Quality Assurance
7. Operations Manager
8. Colleague

Reference Documents

1. [Level Needs Guide Tab](#)

Handling Customer Email / Inquiries

Tagging, Tracking, and Labeling Customer Interactions

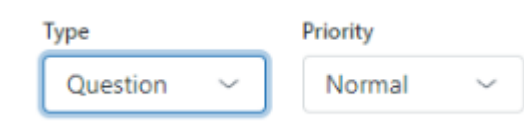
- Involves the use of various trackers in Google Forms.
- Additionally, agents are responsible for applying Zendesk tags and updating Gmail labels.
- It's crucial to regularly maintain and update these records, ensuring the transition from "Open" or "Pending" statuses to "Solved" when appropriate.

I. Tag (Zendesk)

- Tags need to be added to each ticket received in Zendesk.
- See the [Level Needs Guide Tab](#) for the complete list of what tags to use for each inquiry classification.



- Always tag tickets as a **QUESTION** type and on **NORMAL** priority.



- Action the ticket by:
 - Directly replying to the customer
 - Leaving an internal note as needed
 - Reassigning the ticket to yourself or to someone else.
- Afterward, Update the Ticket Status as:
 - Open
 - Pending
 - Escalated to IT

- Solved
- Create Follow-up

II. Track (Google Form)

- All **Zendesk tickets** are tracked using the [RB Customer Service Tracker Form](#).
- All **Refunds Requests** are tracked using the [Refund Tracker Form](#).
- All **Trustpilot Reviews** are tracked & updated in the [Survey Tracker Sheet](#).
- All **Ticket Review & Follow-Ups** are tracked using the [Survey Follow-Up Form](#).

III. Label (GMail)

- This is completed each time a ticket is received through the company GMAIL accounts as follows:
 - communications@resumebuilder.com
 - subscriptions@resumebuilder.com
 - contact@resumebuilder.com
- Add your **AGENT** & **"CLOSED"** labels (provided that these labels are available. If not, the CS agent needs to create them first)
- Once labeled, always remove the "inbox" tag to archive closed messages.

In conclusion, CS agents simply **Track, Tag, and Label** each ticket they process throughout their shift.

Level Needs Procedures

- Zendesk receives an inquiry and automatically generates a **NEW ticket**.
- Said ticket falls under the **Unassigned Tickets** filter and is initially claimed by the on-duty CS Agent for processing.
- CS Agent categorizes and processes the email based on the [email drivers](#).
- The **"closed_by_merge"** tag is used whenever a ticket is merged into an active ticket.

Account Maintenance

Unable to Access Account

- Definition: Users report they cannot login or open their account

GDPR Request - DELETE RECORD Request

- Definition: Users request to remove all their information in our database. GDPR stands for General Data Protection Regulation.

I. INITIAL INTERACTION

- TAG (Zendesk)
 1. Input in the Tags Field: **GDPR**.
 2. Message Type: Directly Reply to the Contact. [Use the template \(macro available\)](#).
 - Here, the CS Agent asks the user to confirm their email address. We need the user to send us an email from the email address they asked us to delete data for.
 3. Ticket Status: Update status as **Pending**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

II. CONTACT RESPONDED

- TAG (Zendesk)

1. Tags Field: no changes
2. Message Type:
 - Leave an Internal note for **David Haynes** (Mention David by typing: @David@homefield.com) and notify him that we need to delete content for the customer's email address.
 - Here, the David sends tech the customer's email address to request full content deletion
3. Ticket Status: no changes (status should still be **Pending**).

- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

III. DAVID RESPONDED

- TAG (Zendesk)
 1. Tags Field: no changes
 2. Message Type: Send a confirmation email to the customer that their data has been completely removed from our database.
 3. Ticket Status: Update Status as **Solved**.
- TRACK (Google Form)
 1. Go to the [Email Driver Responses File](#).
 2. Search for the Email Address and/or Zendesk Ticket Number.
 3. Update the Zendesk Status of both entries (from I and II) in Column I by typing **Solved**.
 4. Enter the **ticket resolution date** (based on Philippine Time) in Column J.
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Dispute

- Definition: filed by customer/s to contest or formally challenge a transaction made by Stripe on behalf of ResumeBuilder.com against their credit card, specifically regarding subscription charges.

★ Special Case: Suspected Fraudulent Charge

1. Send that customer our initial dispute template notifying them we received their dispute and also letting them know we tried reaching out to them about a suspected charge. (Jase offered to create a template once finalized/agreed upon)

★ Referenced from [Dispute SOP](#) and [Daily Update Logs](#).

- ★ Before doing anything, check for any prior correspondence that we may have received from the customer in the following::
 - Zendesk
 - Grasshopper
 - Email Response Driver

GENERAL GUIDELINES

1. If the customer's account still shows as **active** - **cancel their account**.
2. If there is any **prior correspondence**, the CS agent should merge tickets **TO THE disputed ticket** (Stripe Email Notification & Ticket Created)
 - a. If there is a prior **ticket**, the CS agent should merge that ticket **TO THE Stripe notification email**.
 - b. Assign ticket to **Jase**.
3. If **none**, skip to step follow the steps below to create a Zendesk account

Dispute - New Dispute

➤ Definition: A tag in Zendesk used for Stripe (email) notifications of a new dispute case.



A **\$23.95 payment** for Resume Builder is being disputed by GOLDMAN SACHS BANK USA because your customer says the product was defective, damaged, or not as described.

You may be able to recover the funds by responding to the dispute before the deadline. We've put together some guides below to help increase your chances of winning the dispute. In the meantime, the card network has reclaimed the payment amount from Stripe, and we have debited your balance accordingly, including the **dispute fee**.

I. INITIAL EMAIL

- ACTION and TAG (Zendesk)
 1. Create an account in Zendesk for the customer
 - a) Click **+Add** on the top left corner (Adding new ticket)
 - b) In the **Requester** field, input the customer's email address
 - If the customer is already in Zendesk, the email will pop up
 - If the customer is NOT in Zendesk,
 - (a) Click Add user
 - (b) Input customer's
 - (i) Email address
 - (ii) First and Last name
 - c) **Assignee** should be the CS agent processing the ticket
 - d) Input the following individuals as **followers** of the ticket
 - Marlon, Donnie, Jase
 - e) Input in the **Tags** Field: Billing_Dispute
 2. Merge tickets to the disputed ticket (Stripe Email Notification & Ticket Created)
 3. Message Type: Directly message the contact. [Use the Template \(Text blaze available\)](#).
 - a) This needs to be **within 8 hours** from the time we received ticket.
 - b) Remember to include the template subject line in order to create the ticket.
 4. Ticket Status: Update as **Pending**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
 2. Fill out the [Dispute Tracker](#) to track the Dispute Request.
 - Use the [RB Team Note Template](#) for additional details pasted to the form.
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

II. AFTER 24 HOURS (from the initial email)

- ★ If the CS agent is on leave/rest day, they need to review their pending filter and send a follow-up upon returning.
- TAG (Zendesk)
 1. Tags Field: No changes
 2. Message Type: Send a follow-up email to the Contact. [Use the template \(macro available\)](#).
 3. **Assign** the ticket to **JASE**
 4. Ticket Status: Update as **Solved**.

- TRACK (Google Form)
 1. Go to the [Email Driver Responses File](#).
 2. Search for the Email Address and/or Zendesk Ticket Number.
 3. Update the Zendesk Status in Column I by typing **Solved**.
 4. Enter the **ticket resolution date** (based on Philippine Time) in Column J.
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Dispute - Dispute Inquiry

➤ Definition: Investigation notification about a filed dispute that gives us a chance to prevent a chargeback.

★ Handle as a [refund ticket](#)

★ Sample below:

stripe

A **\$23.95 payment** payment for Resume Builder received a dispute inquiry from the customer's bank.

This is an inquiry. You have a chance to prevent a chargeback.

The cardholder disputed this charge with their bank, which is requesting more information to decide whether to return the payment to the cardholder.

What is the difference between an inquiry and a chargeback?

Inquiries and chargebacks are both types of disputes. Sometimes a customer's bank initiates an inquiry into a disputed charge before deciding whether to return the money to the customer through a chargeback. No funds have been removed from your account yet.

I. If the amount is **more than \$2.95**, process it like a **do not process the refund**.

- TAG (Zendesk)
 1. Create an account in Zendesk for the customer
 - i. Click **+Add** on the top left corner (Adding new ticket)
 - ii. In the **Requester** field, input the customer's email address
 - If the customer is already in Zendesk, the email will pop up
 - If the customer is NOT in Zendesk,
 - Click Add user
 - Input customer's
 - Email address
 - First and Last name
 - iii. **Assignee** should be the CS agent processing the ticket
 - iv. Input in the **Tags** Field: Billing - Dispute Inquiry
 2. Merge tickets to the disputed ticket (Stripe Email Notification & Ticket Created)
 3. **Reassign** Ticket to **Jase**
 4. Message Type:
 - i. Send the [refund acknowledgment](#) to the customer.
 - ii. Create an internal note and [edit this template](#) (Response to Your Dispute - Refund Issued) with the necessary information.
 - iii. Remember to include the template subject line in order to create the ticket.

5. Ticket Status: Update as **Open**.

- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
 2. Once the refund has been completed, [fill out the Refund Tracker](#).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

II. If it's \$2.95 only and within the 14-day trial period, process it as a [normal refund case](#).

- TAG (Zendesk)
 1. Input in the Tags Field: Billing - Dispute Inquiry
 2. Message Type: **Directly Reply** to the Contact. Use the [refund template \(Text Blaze available\)](#).
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
 2. Once the refund has been completed, [fill out the Refund Tracker](#).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Dispute - Dispute_Update Notif

- Definition: An update notification for submitting evidence, possible fraud transactions, etc.
- ★ Sample below:



Hi Resume Builder,

Thank you for submitting evidence in response to the **\$23.95 dispute**. We've forwarded your response to U.S. Bank National Association-Credit. They'll review your evidence and communicate a decision within 40 days.

- TAG (Zendesk)
 1. Input in the Tags Field: Billing - Dispute_Notif Only
 2. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Billing

Billing - Free Trial Inquiry

- Definition: Customers requesting general information about free features like downloading their resume.

- TAG (Zendesk)
 1. Input in the Tags Field: Billing_Free_Trial
 2. Message Type: **Directly Reply** to the Contact. [Use the appropriate template \(macros available\)](#)
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Billing - Refund Request

➤ Definition: Customers asking for refunds.

A. If the refund is **\$2.95 or less**, do the following:

- TAG (Zendesk)
 1. Input in the Tags Field: Billing_Refund_Request
 2. Stripe: Cancel the subscription in Stripe. Always cancel “immediately” unless asked otherwise.
 3. Message Type: Directly Reply to the Contact. [Use the appropriate refund template \(Text Blaze and Macros available\)](#)
 4. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
 2. Once the refund has been completed, fill out the [Refund Tracker](#).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

B. If **more than \$2.95**, do not process the refund. Do the following:

- TAG (Zendesk)
 1. Input in the Tags Field: Billing_Refund_Request
 2. Message Type:
 - Directly Reply to the contact using the [Refund Acknowledgment \(Macros available\)](#)
 - Leave an internal note using the appropriate [refund template](#).
 3. **Assign** the ticket to **JASE**.
 4. Ticket Status: Update as **Open**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
 2. Once the refund has been completed, fill out the [Refund Tracker](#).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Billing - Refund Request (Lost Resume)

➤ Definition: Customers ask for refunds since their resumes are missing or stored.

- TAG (Zendesk)
 1. Input in the Tags Field: Billing_Refund_Request_Lost_Resume
 2. Message Type: Directly Reply to the Contact. [Use the template \(macros available\)](#).

3. Ticket Status: Update as **Solved**.

- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Billing - Subscription Issue

➤ Definition: Customers having trouble signing up or paying for one of our subscription plans.

- TAG (Zendesk)
 1. Input in the Tags Field: Billing_Subscription_Issue
 2. Message Type: Directly Reply to the Contact. [Use the template \(macro available\)](#)
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Billing - Unwanted Charges (other sites)

➤ Definition: Users report unauthorized transactions, incorrect charges, unaware of the auto-renew feature of the subscription plan, etc.

- both in **Stripe & WordPress**
- Our subscription **pricing doesn't match with the charge** against the sender's card
 - If pricing doesn't match, further investigate the sender's invoice as it may have been converted from another currency.

- TAG (Zendesk)
 1. Input in the Tags Field: Billing_Unwanted_Charges_Other_Sites
 2. Message Type: Directly Reply to the contact. [Use the template \(macro available\)](#)
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Billing Issue - Plan Expired

➤ Definition: Customers report a "Plan Expired" message after paying for the subscription fee

- TAG (Zendesk)
 1. Input in the Tags Field: Billing_Issue_Plan_Expired
 2. Message Type: Directly Reply to the contact. [Use the template \(macro available\)](#)
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)

1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).

- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Tech Issue

GENERAL PROCEDURE

I. INITIAL EMAIL

- TAG (Zendesk)
 1. Input in the Tags Field: appropriate Zendesk tagging based on [Level Needs Guide](#).
 2. Message Type:
 - Resolve the contact's issue by replying accordingly.
 - Send [walkthroughs](#) whenever applicable.
 - Use [the appropriate tech issue template \(Text Blaze available\)](#) if applicable.
 3. Ticket Status: Update as **Pending**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

II. IF NO REPLY, FOLLOW-UP (sent **24 HOURS after the initial email)**

- ★ If the CS agent is on leave/rest day, they need to review their pending filter and send a follow-up upon returning.
- TAG (Zendesk)
 1. Tags Field: no changes
 2. Message Type: Send a follow-up email to the Contact. [Use the template \(Text Blaze available\)](#).
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Go to the [Email Driver Responses File](#).
 2. Search for the Email Address and/or Zendesk Ticket Number.
 3. Update the Zendesk Status in Column I by typing **Solved**.
 4. Enter the **ticket resolution date** (based on Philippine Time) in Column J.
- LABEL (GMail)
 1. No changes

III. IF WITH REPLY, RESOLVE THE TECH ISSUE OR ESCALATE TO IT, WHICHEVER IS NECESSARY.

Cannot Download

➤ Definition: Users reporting problems in downloading their resumes.

- TAG (Zendesk)
 1. Input in the Tags Field: Cannot_Download
 2. Message Type:
 - Resolve the contact's issue by replying accordingly.
 - Send [walkthroughs](#) whenever applicable.
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)

1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Cannot Download - (Empty Space/Blank Space)

➤ Definition: Users download their resumes, but a blank template comes up.

- TAG (Zendesk)
 1. Input in the Tags Field: Cannot_Download_Empty
 2. Message Type:
 - Resolve the contact's issue by replying accordingly.
 - Send [walkthroughs](#) whenever applicable.
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Cannot Download (Different Template downloaded)

➤ Definition: Users try to download their resumes, but a different version appears.

- TAG (Zendesk)
 1. Input in the Tags Field: Cannot_Download_Different
 2. Message Type:
 - Resolve the contact's issue by replying accordingly.
 - Send [walkthroughs](#) whenever applicable.
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Downloaded - Incorrect Format

➤ Definition: Users report inconsistencies between their downloaded resumes and the ones built into the app.

- TAG (Zendesk)
 1. Input in the Tags Field: Downloaded_Incorrect_Format
 2. Message Type:
 - Resolve the contact's issue by replying accordingly.
 - Send [walkthroughs](#) whenever applicable.
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Downloaded - Incorrect Format (Docx)

➤ Definition: Users ask to download their resumes in a doc/docx format.

- TAG (Zendesk)
 1. Input in the Tags Field: Downloaded_Incorrect_Format_Docx
 2. Message Type:
 - Resolve the contact's issue by replying accordingly.
 - Send [walkthroughs](#) whenever applicable.
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Downloaded - Incorrect Format (PDF)

- Definition: Users downloaded their resumes in PDF, but it's in the wrong format from what they selected.
- TAG (Zendesk)
 1. Input in the Tags Field: Downloaded_Incorrect_Format_PDF
 2. Message Type:
 - Resolve the contact's issue by replying accordingly.
 - Send [walkthroughs](#) whenever applicable.
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Lost Resume

- Definition: Users report missing resumes.

- TAG (Zendesk)
 1. Input in the Tags Field: Lost_Resume
 2. Message Type:
 - Resolve the contact's issue by replying accordingly. You may use the template (Text Blaze available) if applicable.
 - Send [walkthroughs](#) whenever applicable.
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Lost Resume (After signup)

- Definition: Users created resumes, signed up for an account, then couldn't locate their finished resumes.

- TAG (Zendesk)
 1. Input in the Tags Field: Lost_Resume_After_Signup
 2. Message Type:
 - Resolve the contact's issue by replying accordingly. You may use the template (Text Blaze available) if applicable.
 - Send [walkthroughs](#) whenever applicable.

3. Ticket Status: Update as **Solved**.

- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Lost Resume (Progress not saved)

➤ Definition: Users created resumes, signed up for an account, then couldn't locate their finished resumes.

- TAG (Zendesk)
 1. Input in the Tags Field: Lost_Resume
 2. Message Type:
 - Resolve the contact's issue by replying accordingly. You may use the template (Text Blaze available) if applicable.
 - Send [walkthroughs](#) whenever applicable.
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Lost Resume (After signup)

➤ Definition: Users created resumes, signed up for an account, then couldn't locate their finished resumes.

- TAG (Zendesk)
 1. Input in the Tags Field: Lost_Resume_Progress_Not_Saved
 2. Message Type:
 - Resolve the contact's issue by replying accordingly. You may use the template (Text Blaze available) if applicable.
 - Send [walkthroughs](#) whenever applicable.
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Lost Resume (User Stated they Saved)

➤ Definition: Users saved their resumes but reported them missing.

- TAG (Zendesk)
 1. Input in the Tags Field: Lost_Resume_User_Saved
 2. Message Type:
 - Resolve the contact's issue by replying accordingly. You may use the template (Text Blaze available) if applicable.
 - Send [walkthroughs](#) whenever applicable.
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).

- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Cancellation

Cancellation - Claim to Cancel Prior

➤ Definition: Customers report that they either requested cancellation beforehand or have already terminated their subscription.

- TAG (Zendesk)
 1. Input in the Tags Field: Cancellation_Claim_to_Cancel
 2. Stripe: Cancel the subscription in Stripe. Always cancel “immediately” unless asked otherwise.
 3. Message Type: Directly Reply to the Contact. [Use the appropriate template \(macros available\)](#)
 4. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Cancellation - No Refund

➤ Definition: Users request to cancel their subscription but not asking for a refund.

- TAG (Zendesk)
 1. Input in the Tags Field: Cancellation_No_Refund
 2. Message Type: Reply to the contact according to the below account scenarios.
 - I. If **no account in Stripe** but **found one in WordPress**,
 - Use the [Cancellation - No Paid Subscription template \(Text Blaze available\)](#).
 - Ensure to attach the walkthroughs
 - [How to Delete your Profile: ResumeBuilder.com](#)
 - [How to Cancel Your Subscription Plan: ResumeBuilder.com](#)
 - II. If the customer claims that their **card was charged** but has **no account in Stripe**,
 - Refer to steps in processing [“Unwanted Charges \(other sites\)” \(macro available\)](#).
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New Labels.

Customer Complaints

Customer Complaints - Bad Review

➤ Definition: Customers send negative feedback about the app or subscription plan.

- TAG (Zendesk)
 1. Input in the Tags Field: Customer_Complaints_Bad_Review

2. Message Type: Leave an **internal note** to input all necessary information related to that particular customer leading them to leave a bad review, if any.
3. **Assign** the ticket to **JASE**.
4. Input the names below as **followers** of the ticket inquiry
 - Marlon and Donnie
5. Ticket Status: Update as **Open**.

- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Customer Complaints - Escalation Threats (Unwanted Charges)

➤ Definition: Customers threaten to report our company to regulatory authorities/law enforcement.

A. If the refund amount requested is **\$2.95 or less**, do the following:

- TAG (Zendesk)
 1. Input in the Tags Field: Customer_Complaints_Escalation_Threats
 2. Stripe: Cancel the subscription in Stripe. Always cancel “immediately” unless asked otherwise.
 3. Message Type: Directly Reply to the Contact.
 - Apologize and Empathize, if needed.
 - [Use the Unsatisfied/Unhappy Refund template \(Text Blaze available\)](#)
 4. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
 2. Once the refund has been completed, fill out the [Refund Tracker](#).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

B. If the refund amount requested is **more than \$2.95**, do the following:

- TAG (Zendesk)
 1. Input in the Tags Field: Customer_Complaints_Escalation_Threats
 2. Stripe: Cancel the subscription in Stripe. Always cancel “immediately” unless asked otherwise.
 3. Message Type:
 - Directly Reply to the contact.
 - Apologize and Empathize, if needed.
 - Using the [Refund Acknowledgment \(Macros available\)](#)
 - Leave an internal note using the appropriate [refund template](#).
 4. **Assign** the ticket to **JASE**.
 5. Ticket Status: Update as **Open**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
 2. Once the refund has been completed, fill out the [Refund Tracker](#).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Customer Complaints - Irate Customers

➤ Definition: Customers who are frustrated/angry due to app/subscription issues.

- TAG (Zendesk)
 1. Input in the Tags Field: Customer_Complaints_Irate Customer
 2. Message Type: Leave an **internal note** to input all necessary information related to that particular customer leading them to leave a bad review, if any.
 3. **Assign** the ticket to **OM Marlon**
 - Input the names below as **followers** of the ticket inquiry
 - Jase and Donnie
 4. Ticket Status: Update as **Open**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Customer Complaints - Irate Customers (Lost Resume)

➤ Definition: Customers who are extremely frustrated/angry because their resumes are missing or weren't stored.

- TAG (Zendesk)
 1. Input in the Tags Field: Customer_Complaints_Irate_Lost
 2. Message Type: Leave an **internal note** to input all necessary information related to that particular customer leading them to leave a bad review, if any.
 3. **Assign** the ticket to **OM Marlon**
 - Input the names below as **followers** of the ticket inquiry
 - Jase and Donnie
 4. Ticket Status: Update as **Open**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Grasshopper

➤ Definition: Users left voicemails & transcribed by Grasshopper.

★ Whenever someone leaves a voice message, they should automatically receive an automated message.

I. Voicemail with clear inquiry

- ACTION (Grasshopper)
 1. Check if an automated message was sent to the user's number.
 - If there is, proceed to Zendesk Tagging.
 - If none, send a text message (SMS) to the user's number. Use the [appropriate Grasshopper template \(Text Blaze available\)](#).
- TAG (Zendesk)
 1. Input in the Tags Field: Grasshopper
 2. Change message type to internal notes.
 3. Ticket Status: Tag as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).

- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels
- II. Voicemail without clear inquiry
- ACTION (Grasshopper)
 1. No need to check nor send a text message to the customer since we'd be communicating with them via the email they sent.
 - TAG (Zendesk)
 1. Input in the Tags Field: Grasshopper
 2. Change message type to internal notes.
 3. Ticket Status: Tag as **Solved**.
 - TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
 - LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels
- III. Left Voicemail followed by an email (only a few minutes delay)
- ACTION (Grasshopper)
 1. Check if an automated message was sent to the user's number.
 - If there is, proceed to Zendesk Tagging.
 - If none, send a text message (SMS) to the user's number. Use the [appropriate Grasshopper template \(Text Blaze available\)](#).
 - TAG (Zendesk)
 1. Email received from the Grasshopper Contact will be treated as a separate ticket based on the corresponding email driver.
 2. Grasshopper Ticket (only)
 - Input in the Tags Field: Grasshopper
 - Change message type to internal notes.
 - Merge this Grasshopper ticket TO THE email received from the same contact/person.
 - **Ticket Status will automatically be updated as Solved.**
 - TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
 - LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

How-To-Walk-Through

- Definition: Customers need detailed guidance in using the app.
 - Identical with Tech Issue email driver.

- TAG (Zendesk)
 1. Input in the Tags Field: How_To_Walk_Through
 2. Message Type:
 - Resolve the contact's issue by replying accordingly.
 - Send [walkthroughs](#) whenever applicable.
 3. Ticket Status: Update as **Solved**.

- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Others

Others - Discount code

➤ Definition: Users ask about discounts or promotional offers.

- TAG (Zendesk)
 1. Input in the Tags Field: Others_Discount_Code
 2. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Others - Job Search

➤ Definition: Job inquiries or emails stating they're looking for a job

- TAG (Zendesk)
 1. Input in the Tags Field: Others_Job_Search
 2. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Others - Spam

➤ Definition: Unsolicited emails (ex. Marketing, Non-English)

- TAG (Zendesk)
 1. Input in the Tags Field: Others_Spam
 2. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Others - Linkbait

➤ Definition: Messages related to backlink requests.

- TAG (Zendesk)
 1. Input in the Tags Field: Others_Linkbait
 2. Message Type:
 - A. If the message is about backlinking to one of the Sales Team' pseudo:
 - Leave an internal note for OM Marlon (Mention @ Marlon.celso@intelligent.com) to notify him about the backlink response for our sales team; **OR**
 - **Assign** ticket to **OM Marlon**
 - B. If the message is not related to our sales initiative and asks for a backlink (marketing email)
 - Simply ignore
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Others - Test

➤ Definition: Messages sent/received for testing purposes

- TAG (Zendesk)
 1. Input in the Tags Field: Others_Test
 2. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Others - Feature Suggestion/ Contact Feedback

➤ Definition: Users suggest improving a feature / Users share their positive experience using the app.

- ACTION (Report to OM)
 1. Notify OM Marlon about the New Feature Suggestion / Contact Feedback
- TAG (Zendesk)
 1. Input in the Tags Field: Others_Feature_Suggestion
 2. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Others - Trustpilot/SiteJabber

➤ Definition: Notifications received from Trustpilot/SiteJabber about guest posts or reviews.

- A. Trust Pilot Review Notification
 - TAG (Zendesk)
 1. Input in the Tags Field: Others_TrustPilot
 2. Ticket Status: Update as **Solved**.

- ACTION (Zendesk)
 1. Search for the records related to the customer who reviewed us
 - If no retrieved records, contest negative review to Trustpilot
 - If with records, proceed to tracking via Survey Tracker.
- TRACK (Google Form)
 1. Track the Trustpilot Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
 2. Fill out the [Survey Report File](#) by filling out the necessary columns:
 - Column A: Review Date
 - Column B: Star Rating
 - Column C: Customer Name
 - Column D: Zendesk Ticket
 - Column E: CS Agent who handled the concern
 - Column F: Issue / Concern
 - Column G: If the CS agent sent a survey request
 - Column H: Remarks field
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

B. Subscription-Related Notification from TrustPilot

- TAG (Zendesk)
 1. Input in the Tags Field: Others_TrustPilot
 2. **Assign** Ticket to **OM Marlon**
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

Issue Unclear

- Definition: Users ask for help but have little to no context. CS Agents are unable to respond accurately without asking for more information.

I. INITIAL EMAIL

- TAG (Zendesk)
 1. Input in the Tags Field: Others_Issue_Unclear
 2. Message Type: Directly Reply to the Contact. Use the [Issue Unclear template \(macro available\)](#)
 3. Ticket Status: Update as **Pending**.
- TRACK (Google Form)
 1. Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels

II. IF NO REPLY, FOLLOW-UP (sent 24 HOURS after the initial email)

- ★ If the CS agent is on leave/rest day, they need to review their pending filter and send a follow-up upon returning.
- TAG (Zendesk)
 1. Tags Field: no changes

2. Message Type: Send a follow-up email to the Contact. [Use the Issue Unclear follow-up template \(Text Blaze available\)](#).
3. Ticket Status: Update as **Solved**.

- TRACK (Google Form)
 1. Go to the [Email Driver Responses File](#).
 2. Search for the Email Address and/or Zendesk Ticket Number.
 3. Update the Zendesk Status in Column I by typing **Solved**.
 4. Enter the **ticket resolution date** (based on Philippine Time) in Column J.
- LABEL (GMail)
 1. No changes

III. IF WITH REPLY, RESOLVE THE TECH ISSUE OR ESCALATE TO IT, WHICHEVER IS NECESSARY.

Zendesk Issue - email only

➤ Definition: A problem with Zendesk where a message just displays an email address or blank tickets.

- TAG (Zendesk)
 1. Input in the Tags Field: Zendesk_Issue
 2. Message Type: Directly Reply to the Contact. Use the [appropriate template \(macro and Text Blaze available\)](#)
 3. Ticket Status: Update as **Solved**.
- TRACK (Google Form)

Track the Ticket via the [Email Driver Tracker](#) (RB Customer Service Tracker).
- LABEL (GMail)
 1. Add the following labels:
 - Agent Label
 - Closed Label
 - Remove the Inbox and New labels