

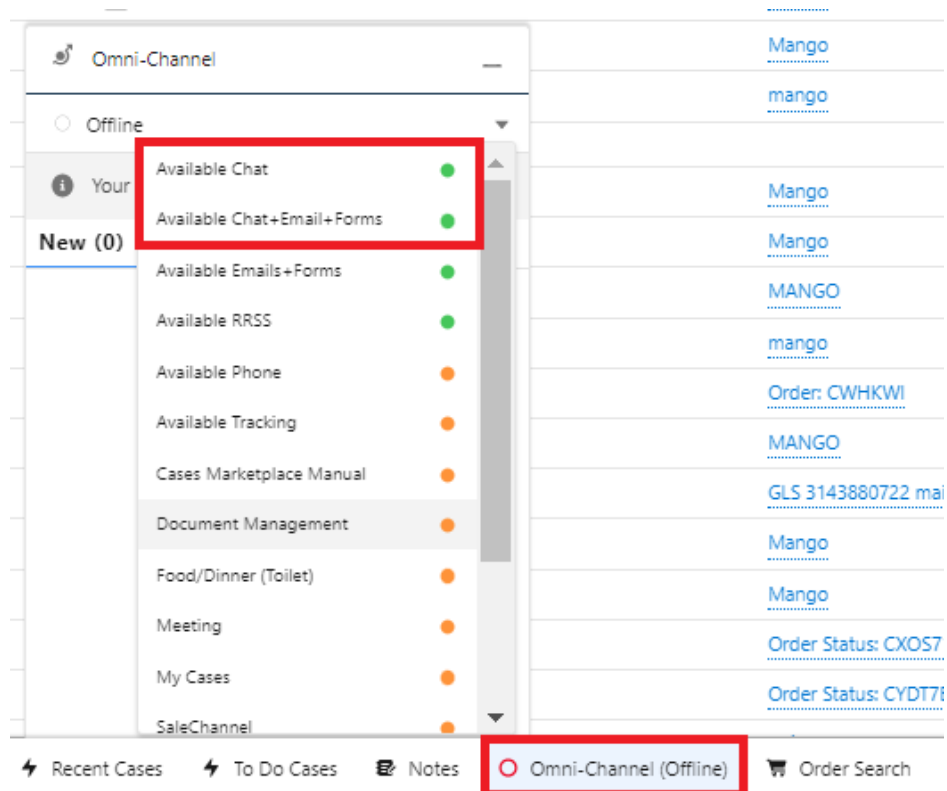
Live Chat Management

SUMMARY

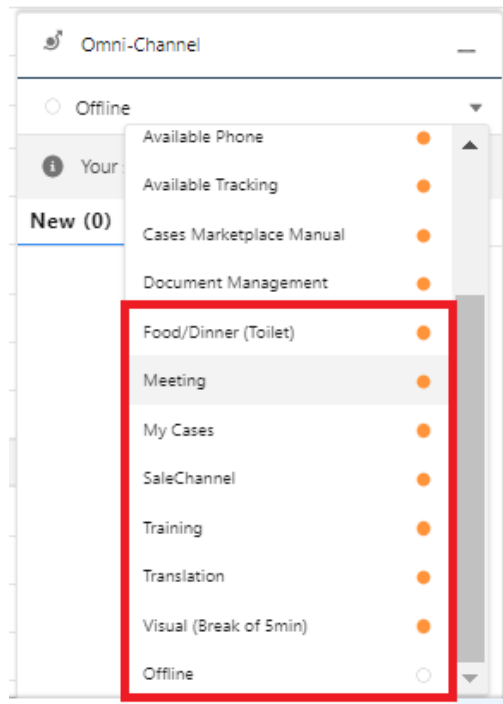
1. LOGIN	3
2. OPERATION	5
2.1. LOGGED-IN CUSTOMER	5
2.2. CUSTOMER NOT LOGGED IN	6
2.3. OPERATION PROTOCOL	7
2.4. CHAT WINDOW	11
2.5. QUICK TEXTS (PREDEFINED ANSWERS)	21
2.6. TRANSFER A CHAT TO ANOTHER AGENT due to language of customer	22
3. DATA PROTECTION PROTOCOL	25

1. LOGIN

It is not necessary to log in to any platform or enter special credentials, so that we can enter conversations through chat, we simply have to select the status "Available Chat" or "Available Chat+Emails+Forms" in Omnichannel:



It is very important to disconnect at the end of the day or choose the corresponding pause option in Omnichannel once all the chat conversations we have active at the moment have ended:



When we return from our pause, we must return to the **"Available Chat"** or **"Available Chat+Emails+Forms"** status.

2. OPERATION

2.1. LOGGED-IN CUSTOMER

By logged in customer we mean the customer who consults the chat having logged in with their credentials in their account.

It is offered both in the desktop version of the website and in the App.

Being logged in allows the assistant to directly provide information on the status of orders.

Online assistant ×

Where is my order?

M Your order placed on saturday 14 May 2022 amounting to 156.91 EUR has been sent on tuesday 17 May 2022. You will shortly receive an e-mail with the delivery details.

M Has your query been resolved?

Yes

No

2.2. CUSTOMER NOT LOGGED IN

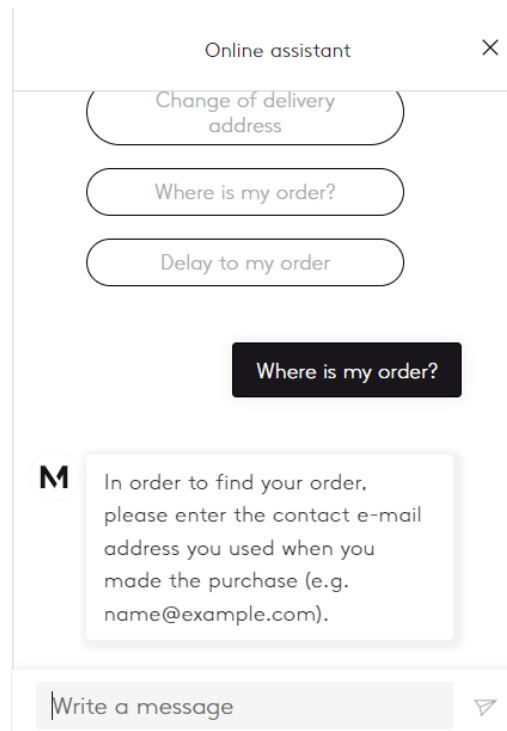
If the customer IS NOT LOGGED IN, before transferring the customer with an agent, the virtual assistant will ask for the email and name:

The screenshot shows a chat window titled "Assistente online" with a close button (X) in the top right corner. The interface contains the following elements:

- A dark button labeled "Contatta l'agente" at the top.
- A message bubble from the assistant (M) with the text: "Per iniziare la conversazione e monitorare la richiesta, abbiamo bisogno della tua e-mail."
- A dark input field containing the email address "roser.berenguer@mango.com".
- A second message bubble from the assistant (M) with the text: "Potresti dirci il tuo nome completo per rivolgerci a te?"
- A dark input field containing the name "Roser Berenguer".

CUSTOMER NOT LOGGED IN - OPTION "ORDER STATUS"

For this option, the virtual assistant will only ask the email in order to show the recent orders and so that the client can indicate which one she/he wants to check before transferring the case to a human agent.

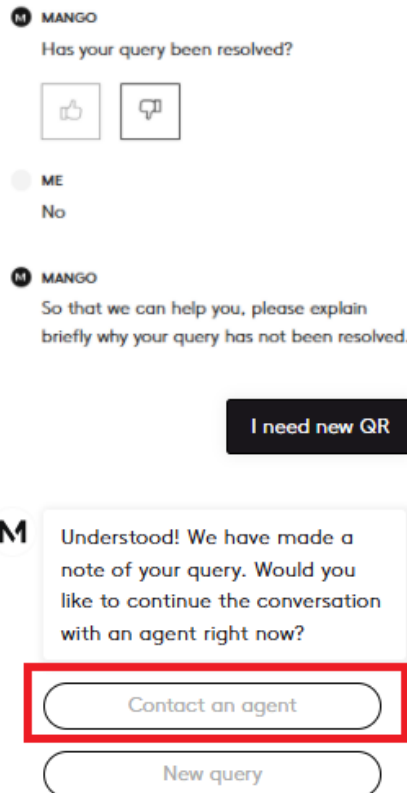


We will be able to identify that it is a **NON-LOGGED customer** because the virtual assistant will have asked for the email address.

2.3. OPERATION PROTOCOL

In both cases (whether logged in or not logged in), once transferred to an agent, normally it will not be necessary for us to ask the customer for their name, order number, or email address because that information will have already been requested by the bot and will appear in the chat window. All we have to do is provide the client with the information needed.

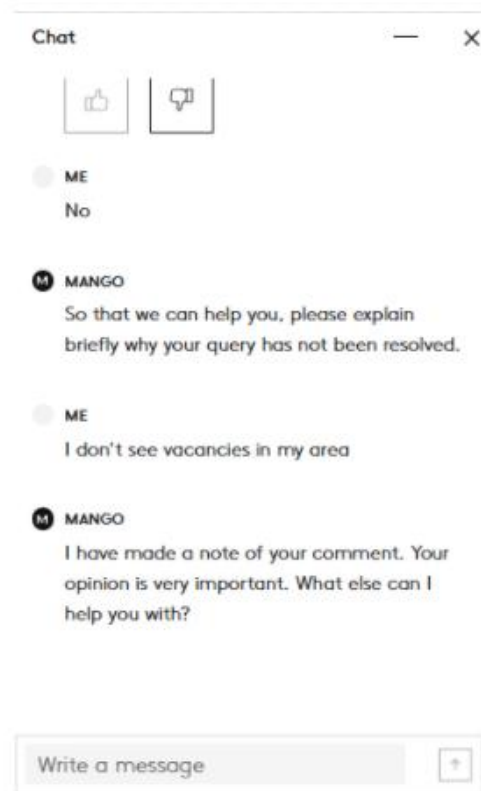
The **chat with human agent (live chat)** comes into operation **when the chatbot is not able to resolve the customer's query or when the customer** answers "Not much" or clicks the "thumbs-down" button after the question "Has your query been resolved?".



It should be noted that queries related to the following classifications do not allow agent transfer:

- Account Personal Data
- Company
- Partnership
- Products

In these cases, the bot simply thanks them for the comments and says goodbye.



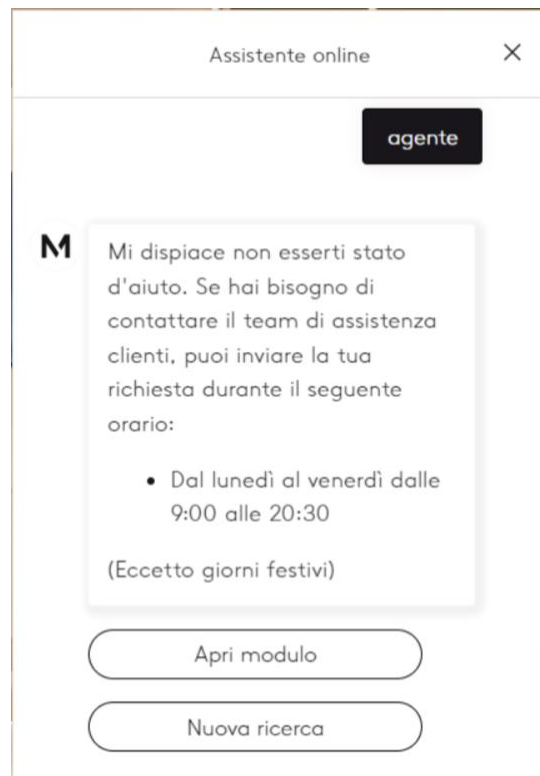
CHATLIVE BUSINESS HOURS

The option to chat with a human agent is not available 24 hours. Each country offers chat live at a certain time.

Depending on the business hours of the country, the chat reacts as follows:

- **OUT OF BUSINESS HOURS**

It informs the customer about the service hours so they can contact again within that time, it does not redirect to the webform or to any other channel.



- **WITHIN BUSINESS HOURS**

It responds as follows depending on whether there are agents available or not:

- AVAILABLE AGENTES

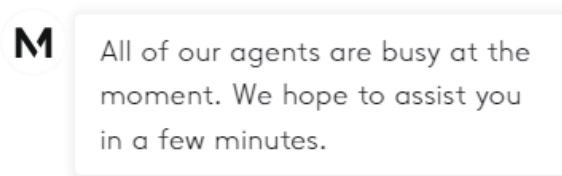
Customer is transferred directly with the agent.

- NO AVAILABLE AGENTES

There is a waiting queue with a capacity of X customers (the capacity of waiting clients is defined according to the country):

- o CUSTOMER IN WAITING QUEUE

A waiting message is displayed:



- o CUSTOMER CANNOT WAIT IN QUEUE BECAUSE THE MAXIMUM CAPACITY OF THE QUEUE HAS BEEN EXCEEDED

The customer is informed that there are no agents at the moment and is asked to contact later:

M

We're sorry, there are no agents available at the moment. Please try again later or check our Help page for more information.

New query

2.4. CHAT WINDOW

Omnichannel automatically assigns the chats to each available agent and at the same time creates the case.

The chat tab displays the **chat number assigned by Salesforce**.

The screenshot displays the MANGO chat interface. On the left, a 'Conversation' window shows a chat started by Julia at 10:04:55 with the message 'Estoy esperando mi pedido' and a timestamp of 10:05:18. Below the message is a text input field and an 'End Chat' button. In the center, the 'Account Cases (4+)' section shows a table of cases:

Case Number	Created Date	Order	Category	Status	Owner
05273775	21/06/2023, 10:04		Measurements / Sizes	Management N2	Julia Vogt
05272146	20/06/2023, 17:05	DH80E	Purchase Conditions / Instructions	New	Julia Vogt
05272144	20/06/2023, 16:54	DH80E	Carrier Names and Delivery Hours	New	Julia Vogt
05272143	20/06/2023, 16:53	DH80E	Refund OK	New	Marta Roca Pascual

Below the table is a 'Create Case' section with a search bar for 'Order/Purchase/External ID' and a 'Search' button. To the right, the 'Customer' section shows details for Julia Vogt, including email (julia.vogt@mango.com), account phone (+3463663406), country (Spain), and language (Spanish). At the bottom, a chat bar shows 'Chat started by Visitor • 9:57:55' and a chat window for '00001259' with a timestamp of '05110718'.

In the central part, in the "Account Cases" section, we can see the cases registered in Salesforce with the same email and allows to check all recent orders, so that we can easily see if the customer has other open cases and the related order number, if any.

In the "PreChat" tab we can see the transcript of the previous conversation that the customer has had with the virtual assistant:

The screenshot displays the Mango chat interface. On the left, the 'PreChat' tab is selected, showing a transcript of a previous conversation. The transcript includes a welcome message from the bot, a size guide request from the user, and a response from the bot. On the right, the 'Account Cases (4+)' section is visible, showing a table of cases. Below this, the 'Create Case' section is partially visible.

Case Number	Created Date	Order	Category
05273775	21/06/2023, 10:04		Measurements / Sizes
05272146	20/06/2023, 17:05	DH80IE	Purchase Conditions / Instructions
05272144	20/06/2023, 16:54	DH80IE	Carrier Names and Delivery Hours
05272143	20/06/2023, 16:53	DH80IE	Refund OK

The answer to the last question of the chatbot is the one that allows the customer to be transferred to a human agent:

The screenshot displays the Mango chat interface with the 'Transcript' tab selected. The transcript shows a conversation where the user asks for delivery options, the bot provides a list of options with estimated delivery times, and the user asks for more information. The bot then offers to transfer the user to a human agent.

Transcript

Description

USER: welcome_trigger

BOT: Hi! I'm your online assistant. I'm here to make your shopping experience at Mango easier. How can I help you?

USER: deliveryReturns

BOT: Choose one of the following options:

USER: deliveryReturns.delivery

BOT: These are the types of delivery available and the estimated delivery times:

- To store (4 - 8 working days)
- Home delivery (2 - 5 days from monday to saturday)
- CollectPlus (3 - 6 working days)
- Express (48h)
- Urgent - Available in selected cities (24h)

More information at [Deliveries](<https://www.mango.com/delivery>)

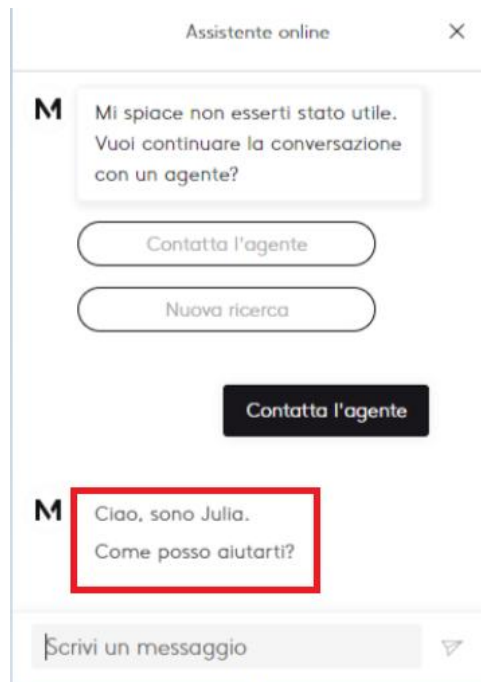
USER: survey.byeKo

BOT: I'm sorry I could not help you. Could you state the reasons? Your opinion will help us improve.

USER: test

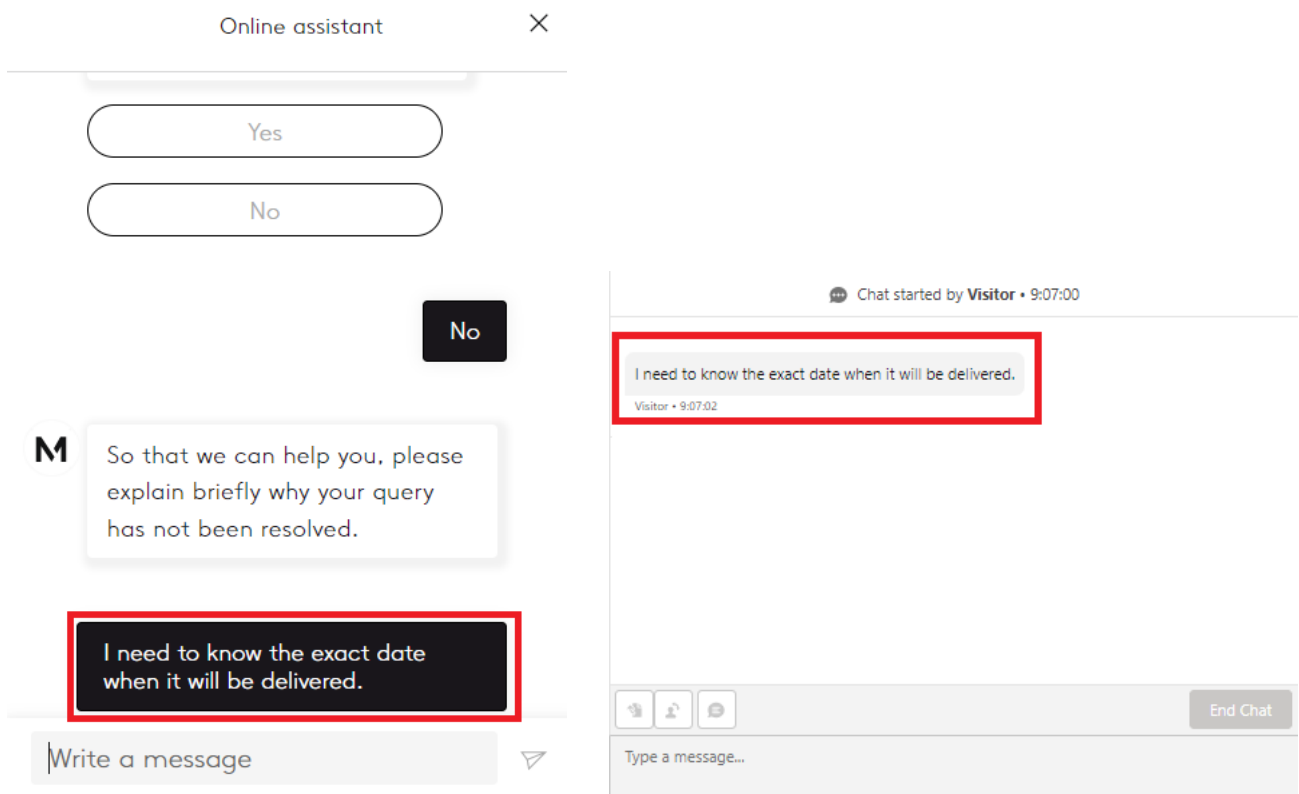
BOT: I'm sorry I couldn't help you. Our customer service is available. Would you like to continue the conversation with an agent?

Immediately afterwards, an automatic greeting message is sent to the customer to initiate the conversation with the agent:

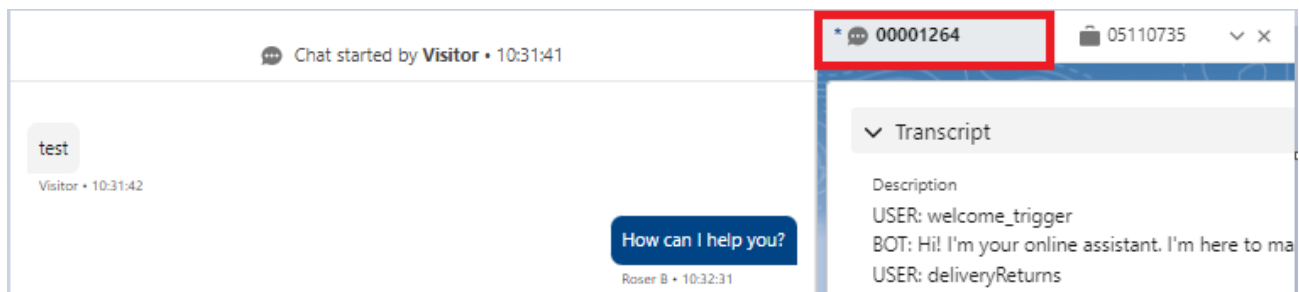


*** When a chat comes in, we must not introduce ourselves, say our name or ask the customer how we can help** because these sentences are already sent to the customer automatically by the bot when the conversation is transferred to a human agent (see image above). We should follow the conversation directly by answering customer's queries.

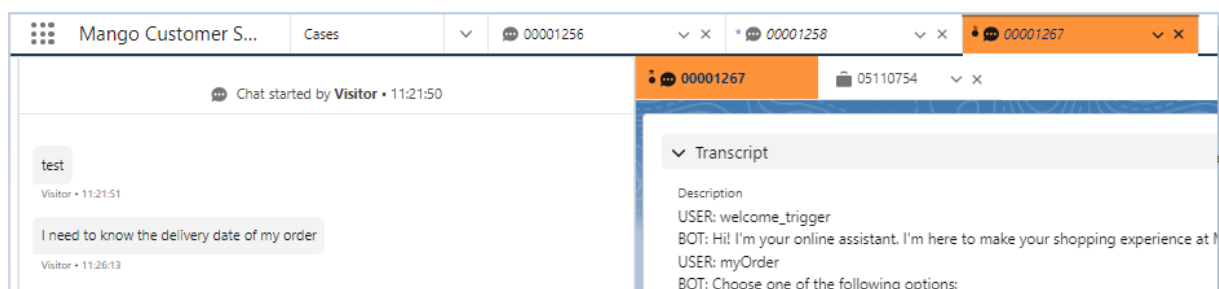
The first message that appears in the "Conversation" tab when the chat comes in is the reason written by the customer as to why the bot has not been able to help them.



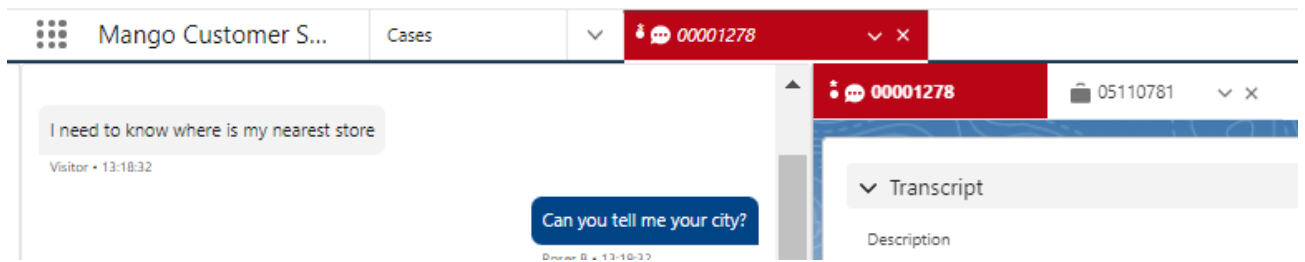
And the chat tab shows in grey:



When the customer types of an additional message, the chat tab changes to orange to alert the agent that an interaction is pending a response:

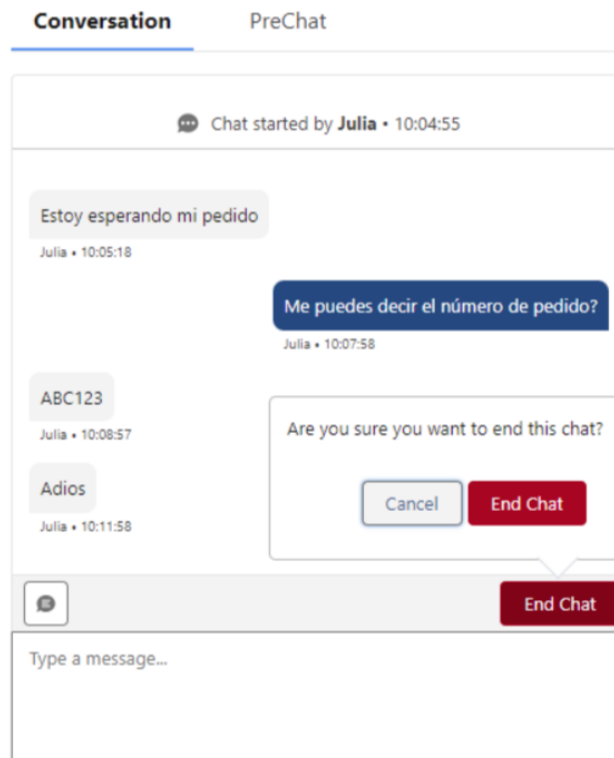


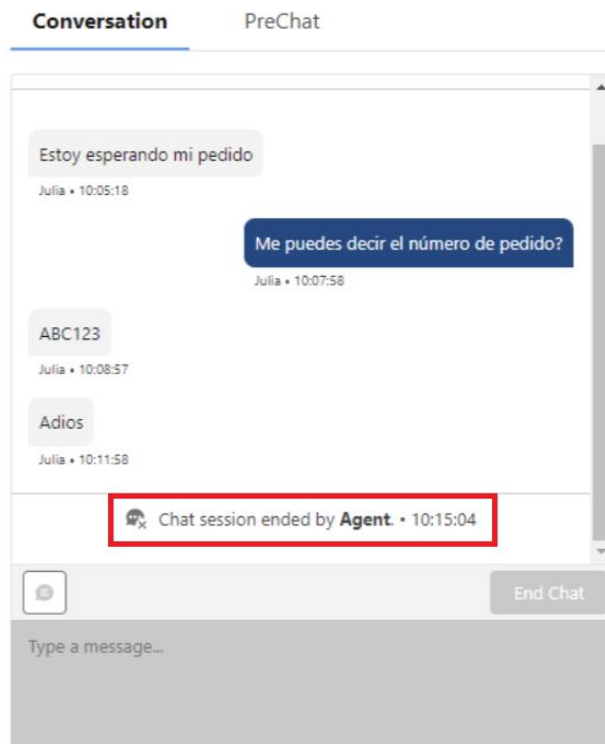
If the agent does not respond after 1 minute, the tab turns **red**.



AGENT CLOSES THE CHAT AFTER ANSWERING ALL QUERIES:

The "End Chat" button is only used when the conversation with the customer is finished, and we want to close the chat window.



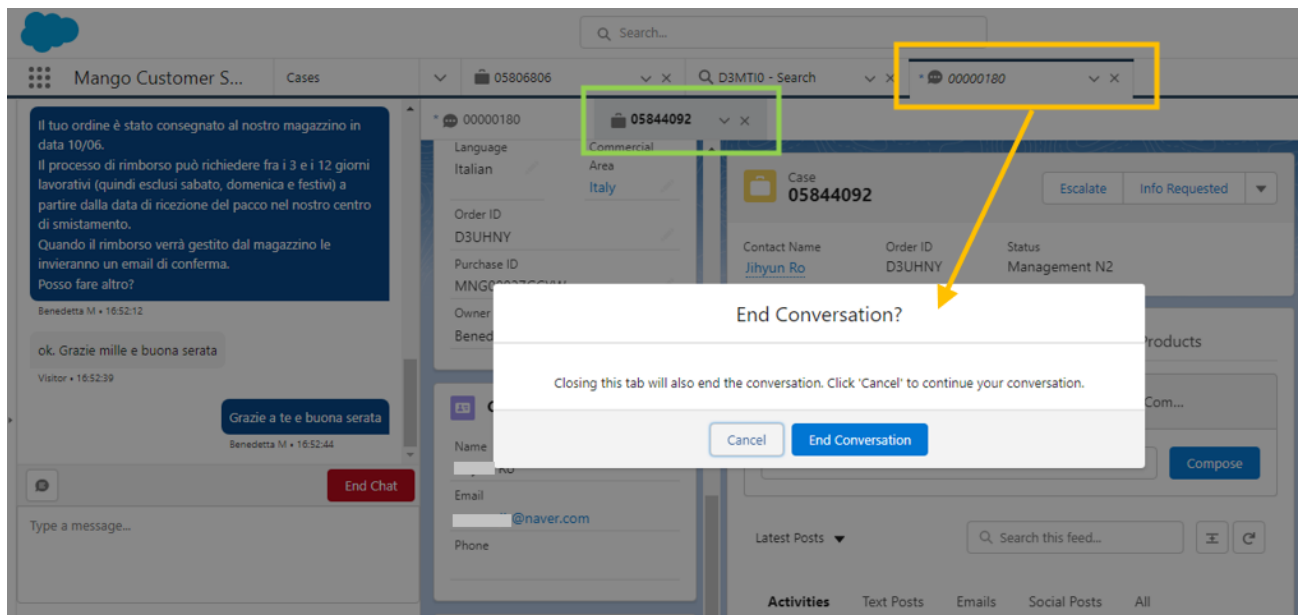


➤ **IF THE AGENT CLOSES THE CHAT TAB WITHOUT HAVING CLICKED ON END CHAT**

(marked in orange in the image below), a message appears notifying that closing the window will end the chat so that the agent can confirm whether he/she really wants to end the chat or not.

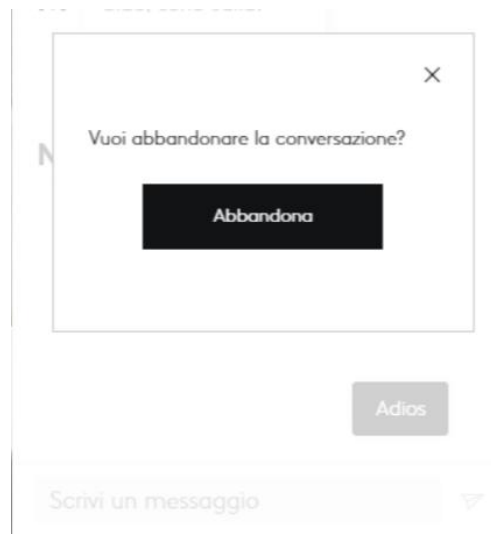
➤ **IF WE CLOSE THE CASE WINDOW**

(marked in green), the agent can retrieve the case in "My Cases" but the chat is not closed and remains on the main screen.

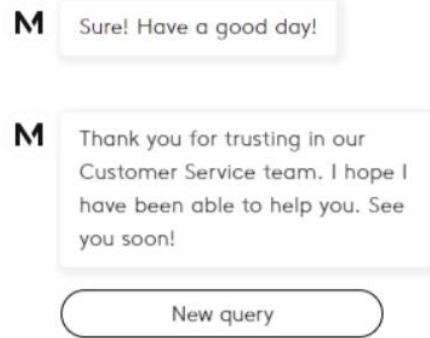


IF IT IS THE CUSTOMER WHO LEAVES THE CHAT:

When the customer decides to close the chat, a confirmation screen appears:



When customer confirms that she/he wants to end the conversation, the following message appears and the chat is no longer active in Salesforce with the message "Chat ended by Customer's Name":

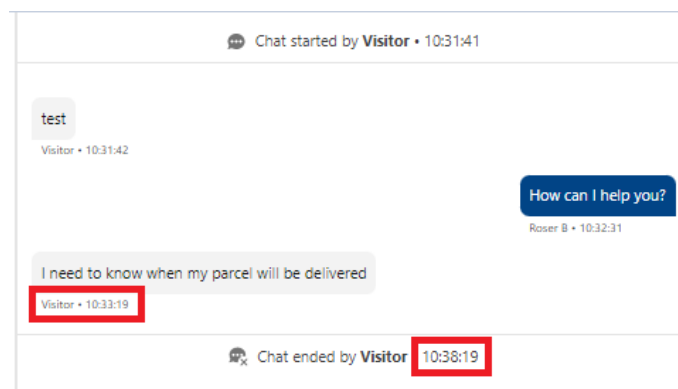


CLOSURE DUE TO CUSTOMER INACTIVITY (TIMEOUT):

There are 3 types of timeout:

- When a customer stops interacting with the **chatbot** in any flow and leaves the chat open: the chat is closed after 19 minutes.
- When a customer stops interacting with the **chatbot** in any flow and leaves the web or closes the browser: the chat is closed after 21 minutes.
- When a customer stops interacting while talking to a human agent (**live chat**): once 5 minutes pass without interaction from the customer, the chat is automatically closed.
It cannot be reopened, if the customer wishes to continue the conversation she/he will have to make a new enquiry.

The chat will be closed, the case will remain open, and the agent will have close it manually immediately.



Case
05110718

[Escalate](#)
[Info Requested](#)
[Return to Omnichannel](#)
[Close](#)

Contact Name

Order ID

Status

Management N2

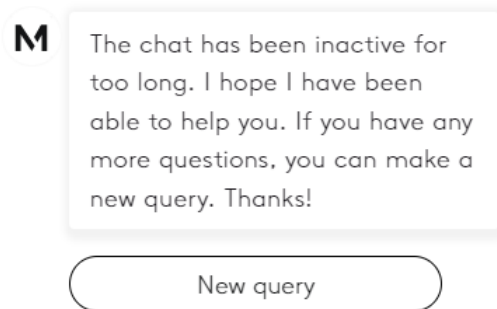
Owner

Roser Berenguer Martorell

Tracking URL Link

[Go to Website](#)

When the chat is disconnected due to inactivity, the following notice is sent to the customer:



It is VERY important to check the related cases of the same client at the bottom of the case to see if there is already a case created with the same order number and/or type of enquiry and, if so, to review all related cases in detail so that we are aware of the entire history of the case in order to:

- To provide the most up-to-date information to the client.
- Avoid possible confusion.
- Avoid contradicting information previously provided by other agents.

Customer History (5/5)
☐ Show chatbot interactions

FILTERS:

All

E8P276

>	11/10/2024, 19:20	Delivery → Lost order → No action taken	E8P276 - 15422758
>	11/10/2024, 01:58	Delivery → Order status → Information provided	E8P276 - 15413732
>	11/10/2024, 01:50	Out of scope → Incomplete message → Information provided	E8P276 - 15413722
>	11/10/2024, 01:37	Out of scope → Incomplete message → Information provided	15413705

* By **type of query** we mean the same or classification and/or contact reason.

It is not possible to add a chat conversation to an existing case.

Therefore, we must always **create a new case** by entering the order number in the field "Create Case > Order/Purchase/External ID":

Conversation

PreChat

Chat started by Julia • 10:04:55

Estoy esperando mi pedido

Julia • 10:05:18

Me puedes decir el número de pedido?

Julia • 10:07:58

ABC123

Julia • 10:08:57

Type a message...

End Chat

00003214

05273775 ...

Account Cases (4+)

Case Number	Created Date	Order	Category	Status	Owner
05273775	21/06/2023, 10:04		Measurements / Sizes	Management N2	Julia Vogt
05272146	20/06/2023, 17:05	DH80IE	Purchase Conditions / Instructions	New	Julia Vogt
05272144	20/06/2023, 16:54	DH80IE	Carrier Names and Delivery Hours	New	Julia Vogt
05272143	20/06/2023, 16:53	DH80IE	Refund OK	New	Marta Roca Pascual

View All

Create Case

Search

Complete this field.

Customer Orders

Order Id	Purchase Id	Purchase Date	Total	Status
DH80IE	MNG0002LUKSD (1)	27/02/2023, 13:29	6.5 EUR	in_preparation (order_invoiced)

Description

The conversation with the bot or virtual assistant (PreChat) will be integrated directly into the case Feed:

To: Internal

Live Chat Transcript: 00953729

Comment

11 de October de 2024 at 0:03

Integrator Mulesoft

To: Internal

Inbound Chat.

11 de October de 2024 at 0:03

undefined

USER: welcome_trigger

BOT: Hi! I'm your online assistant. I'm here to make your shopping experience at Mango easier. How can I help you? During sale and promotion periods delivery times may be longer than usual. Choose one of the following options:

USER: manageOrder

BOT: Choose one of the following options:

USER: manageOrder.changeAddress

BOT: You can choose your preferred delivery method and edit your address during the purchase. Once done, it will not be possible to make changes. If you wish to cancel your order, you can make a cancellation request. To do this, start a new query and select "Managing my order" > "Cancel my order". Before I say goodbye, did you find my answer helpful?

USER: survey.byeko

BOT: I'm sorry I could not help you. Could you state the reasons? Your opinion will help us improve.

USER: I bought a product as a visitor and I can't change the address of the carullisation. Can you do that?

BOT: Thank you! We have made a note of your query. Would you like to continue this conversation now with an agent?

USER: agentTransfer

BOT: To start the conversation and follow up on your query, we need your e-mail.

USER: @gmail.com

BOT: Could you tell us your full name so we can address you?

USER:

The conversation with the human agent has to be consulted by clicking on "Live Chat Transcript":

To: Internal

Live Chat Transcript: 00953729

In the "Details > External" tab of the case, "Not satisfied" appears to indicate that the customer has chosen "Not much" or pressed the "thumbs down" button:

External			
External Contact	9cac6e82-671f-443b-9798-19de3a42e158	External Interaction	b285a6f6-d122-479c-87d9-52297ac7283c
Filled Form		External Interaction Feedback Result	Not satisfied
External Interaction Conversation		External Interaction Feedback Comments	I would like to know if you do price match?
External Interaction Not Aut. Reason			

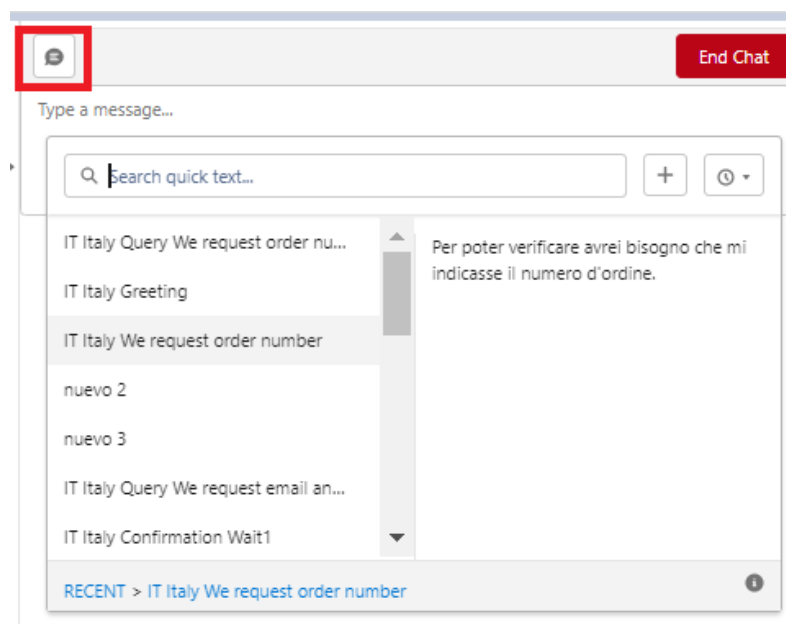
Each agent can have a **maximum of 4 chats** open at the same time or **one chat + one email/web form case**. If they are already dealing with 2 chats, Omnichannel will not be able to assign an email/web form case, only another chat.

It is not possible to send attachments in the chat. If necessary, they must be sent to or by the customer by email.

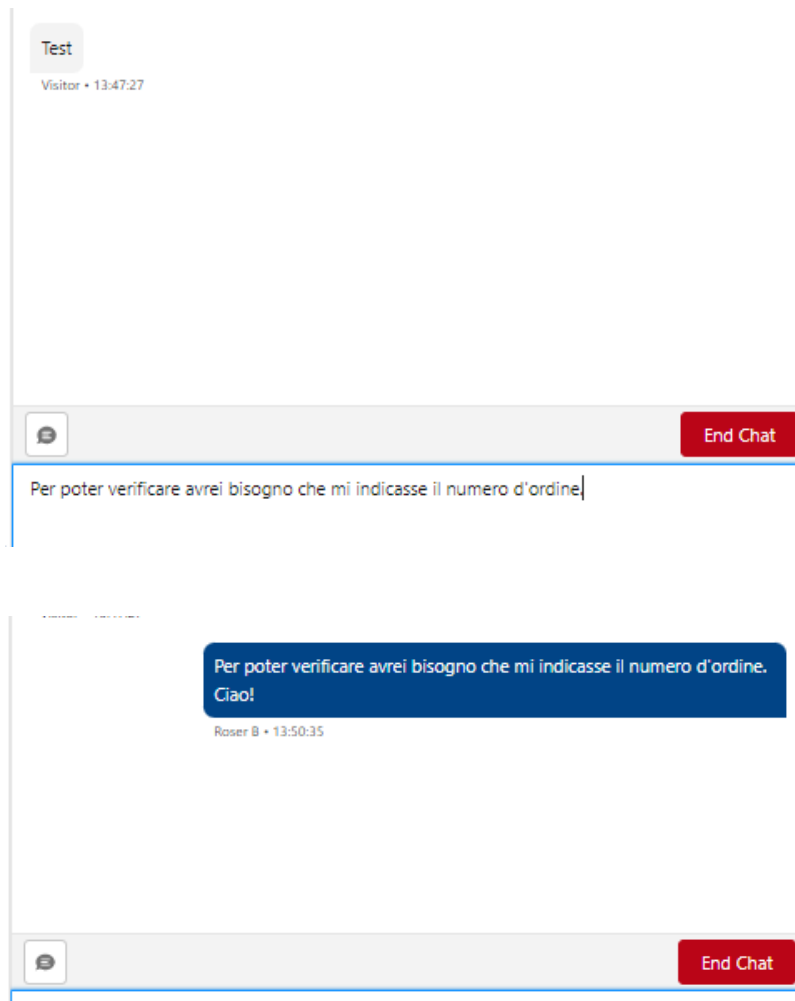
2.5. QUICK TEXTS (PREDEFINED ANSWERS)

In the chat window, we have a recurring phrases button with predefined answers to speed up agent responses.

If we hover the cursor over the phrases on the left, we can preview the complete quick text on the right.



When we click on one of them on the left, the message is copied to the chat window in case the agent wants to add information or modify something. If they do not want to modify anything, simply press Enter.



At the moment we should not use these templates until further notice. For now we must look for the templates in the following Excel:

 [Chat Templates Reviewed.xlsx](#)

Important: we must always check the spelling and style guide, to always follow Mango's formatting and writing guidelines.

2.6. TRANSFER A CHAT TO ANOTHER AGENT DUE TO LANGUAGE OF CUSTOMER

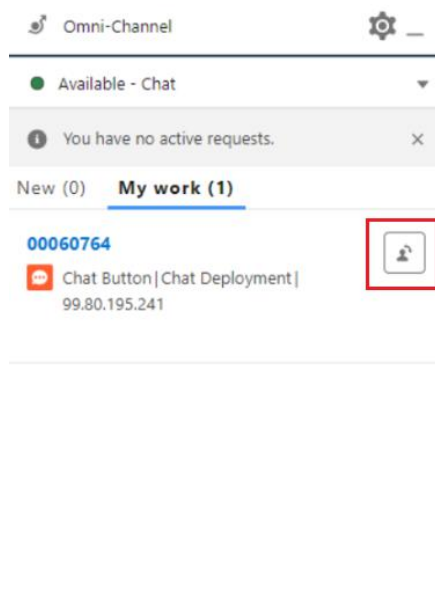
This option should be avoided as much as possible and used only for language issues and not for end of shift.

We should try to end all active chats before going offline or taking any kind of pause.

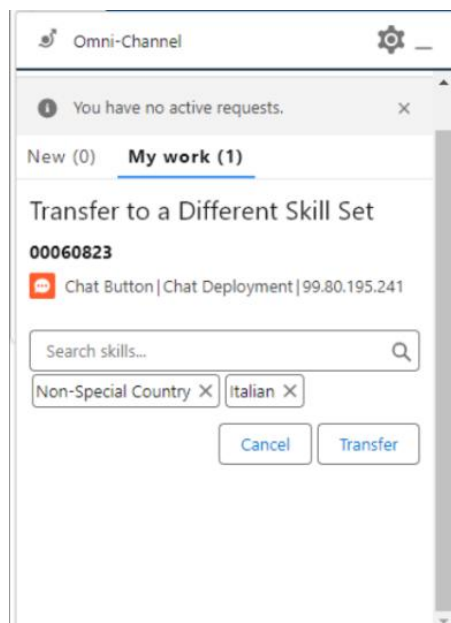
We must transfer the chat from Omnichannel > My Work.

It is important to notify the client before transferring saying “I am going to transfer you to one of my colleagues that will be able to help you further in XXX”.

Then, we must locate the chat ID that we want to transfer and then click on the icon next to it on the right:



The next screen will show the skills of that chat:



We must delete the existing skills by clicking on the X in all and add 2 skills:

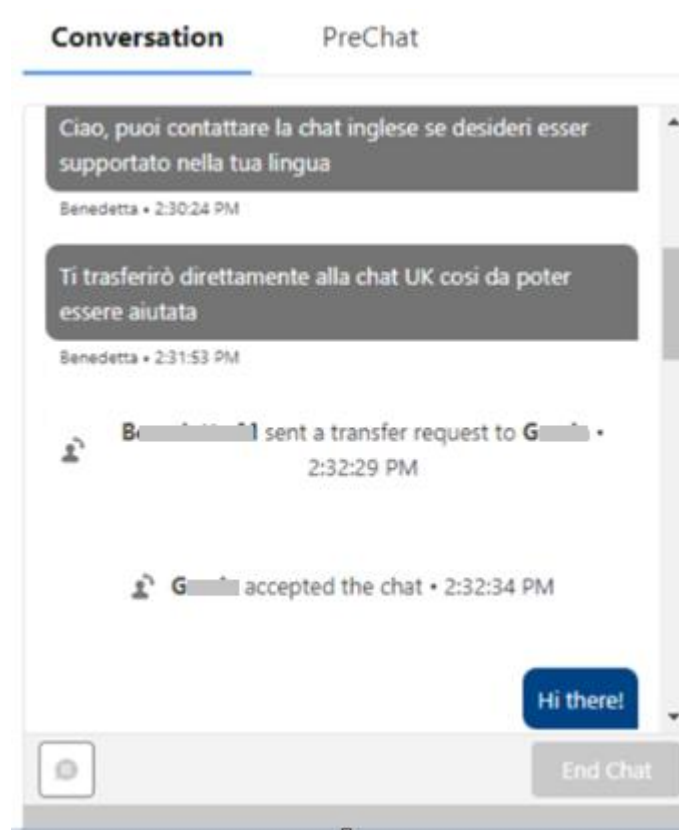
- **NAME OF OUR CONTACT CENTER**

* Note: If the chat being transferred is in a language/country not managed by our contact center, agents must enter the name of the other contact center.

- **LANGUAGE OF THE CONVERSATION**

Once the 2 Skills have been added, press “Transfer”.

This is how it appears in the Salesforce chat window.



3. DATA PROTECTION PROTOCOL

To chat with a human agent, the customer must be logged into their Mango online account, so we can automatically see their contact information.

Therefore, if a customer asks a question related to an order and the email address for the order matches the email address they used to log in to the chat, there's no need to ask the customer for their email or name.

If, on the other hand, the chat involves a customer who isn't logged in (we'll be able to identify this because the bot will have asked for their email address and name), we'll need to validate the information when we receive the case.

We only need to ask the customer for their name and order email again if the email or name doesn't match the order they provided.

WHAT INFORMATION CAN WE SHARE WITH THE CUSTOMER VIA CHAT?

We can share and request the same information as by email: ARN codes, discount codes, gift voucher numbers, etc.

EXCEPTION – PERSONAL DATA REQUESTS (such as ACCOUNT PERSONAL DATA > SUPPRESSION):

These requests cannot be accepted via chat, as it is not essential to be logged into the account to request to speak with a human agent. Therefore, all data protection requests can only be processed by sending an email to personaldata@mango.com.

MANGO