

# Phone Operation Manual

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## DESCRIPTION

Before reaching an agent, phone calls are pre-filtered through an integrated virtual assistant or callbot internally called "Iris Voice". This assistant offers the client several query options via an Interactive Voice Response (IVR) system that helps pre-filter the reason for contact.

There are certain queries that the callbot responds to directly with automated answers, such as:

- **Order status and Estimated delivery date**
- **Order cancellation**
- **Request for return label or QR code**
- **Return conditions**
- **Change of shipping address**
- **Information about promotions**

The automated responses provided by the callbot vary depending on the country from which the client is calling.

## HOW DOES IT WORK

It works similarly to the integrated virtual assistant in conversations through chat (see Chat Operation Manual for more information), creating cases in Salesforce for a human agent to handle certain queries (especially if the order has an issue, requires a request to be logged in the CRM, or if the client indicates that the response was not useful). For other questions, mainly when the client indicates that the response was satisfactory, no case is created in the CRM.

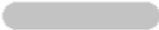
For order status inquiries, when the assistant is unable to correctly detect the client's phone number, calls from an anonymous number or from a phone not registered in the system for a specific order, or does not show purchases, Iris asks the client for the phone number of their order to resolve the inquiry.

If Iris detects that the queried order has a reported issue, does not understand the client, or still cannot find orders after repeating the phone number a second time, the call is transferred directly to a human agent.

# VIEW OF CASES IN SALESFORCE

## 1.1. CASE RESPONDED BY AN AGENT

This is how the upper fields of the case are displayed:


Channel / Origin	Commercial Area / Language	Sender / Brand
Phone	Canada / English	Customer / Mango
Final Classification	Contact Reason	Contact Reason Subdetail
<a href="#">Return-Exchange</a>	<a href="#">General information (FAQs)</a>	<a href="#">How to return</a>
Resolution		
<a href="#">Information provided</a>		
Owner		
		

- **Channel:** Phone.
- **Owner:** Agent's name.
- The interaction with the callbot can be seen in the first activity of the Feed:



## 1.2. CASE RESPONDED WITH AN AUTOMATIC TEMPLATE

The fields are displayed in the same way as in the previous case, except for the Owner field, which will always show "Integrator Mulesoft".

Channel / Origin	Commercial Area / Language	Sender / Brand
Phone	Canada / English	Customer / Mango
Final Classification	Contact Reason	Contact Reason Subdetail
<a href="#">Cancel order</a>	<a href="#">Cancellation request</a>	
Resolution		
<a href="#">Successful by automation</a>		
Owner		
Integrator Mulesoft 		

Additionally, in the Feed, the sender of the automated responses is always “Integrator Mulesoft”.

**Integrator Mulesoft** 🤖

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To: Internal

📞 Inbound Call [Call-04077102](#).



USER: CancellationRequest

BOT: Hi! Sana. I'm Iris. I see there is an order associated with this phone number. Are you sure you wish to cancel the order placed on thursday, 2024-10-10 for 255.36 CAD?

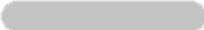
USER: yes

BOT: OK. We're going to review your request. Don't worry, we will send you an email shortly, letting you know if your order can be cancelled.

**Integrator Mulesoft** 🤖



To:



# MANGO

Hi Sana,

We thank you for getting into contact with us. Your case number is 15419542.

We would like to confirm that your request has been passed to the relevant department. We will get back in touch in the upcoming days.

Best regards from all the Mango team.

Mango Customer Service

## MANAGEMENT OF CASES IN SALESFORCE

The classification selected in the case by Iris purely depends on the option chosen by the client when calling. It is important to **review if the classification + contact reason + subdetail is correct and change it if necessary.**

We must always review the data recorded in the "Customer" field and modify or add it if necessary.

**In the call comment, we must always write a summary of the conversation with the customer, ensuring that all relevant information about the case is indicated in a comprehensible and clear manner and in English so that most agents can understand it without needing to use a translator.**

It is very important to always check if there are related cases with the same order number and classification + contact reason to provide the most updated information, not contradict information provided from another case, and not request information that has already been provided previously.

If the inquiry is related to an order and it is not registered in the case, we must search in Salesforce by the phone number.

If the order has already been delivered when Omnichannel assigns the case to us, we do not need to contact the customer; we simply need to close the case by adding a comment with the delivery date.

In the first incoming contact of the Feed, we can see the transcript of the conversation held with Iris Voice Assistant, and by clicking on the ID, we can see which phone they called to and the phone from which the call was made:

The screenshot displays a Salesforce case record for an inbound call. The case ID is **d451604cb23f43f69ffa332a8bc2a31c**. The contact is **Integrator Mulesoft**. The call is categorized as **Inbound Call** with a call ID of **Call-04077102**. The transcript shows a conversation about a cancellation request. A pop-up window provides detailed call information:

Field	Value
Input Flow	Source Phone
Destination Phone	+1289
IVR Options	Type: Inbound
	Iris: <input checked="" type="checkbox"/>
	CancellationRequest

The transcript includes the following messages:

- USER: CancellationRequest
- BOT: Hi! Sana. I'm Iris. I see there is a cancellation request for your order.
- USER: yes
- BOT: OK. We're going to review your request. Don't worry, we will send you an email shortly, letting you know the status.

\* Cases registered with the phone number 34938602222 (this is the phone number of the reception of Mango's headquarters in Spain). We should never call this number or save it in any case. Either we select NO CUSTOMER if it is not necessary to call the customer again later, or we request the name and phone number and create a Guest Customer.

**MANGO**