



UiPath ICCA

Intelligent Customer Communication Automation

Submission to #UiPath #PowerUp 2019

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About UiPath ICCA

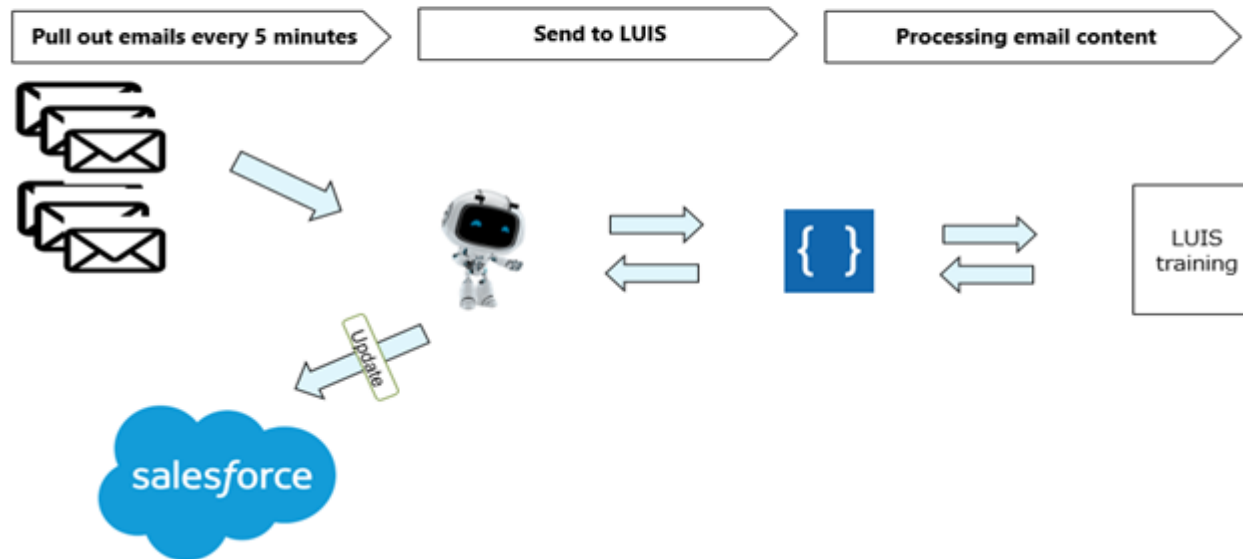
INTELLIGENT CUSTOMER COMMUNICATION AUTOMATION

- **Automation First:** smoothen the communication with customers.
- **Artificial Intelligence:** using state-of-the-art Language Understanding Intelligent Service (LUIS).
- **Salesforce Integration:** facilitating Open Cases in Salesforce Lightning Platform.
- **Automatic Classification:** new cases and existing cases in Salesforce.

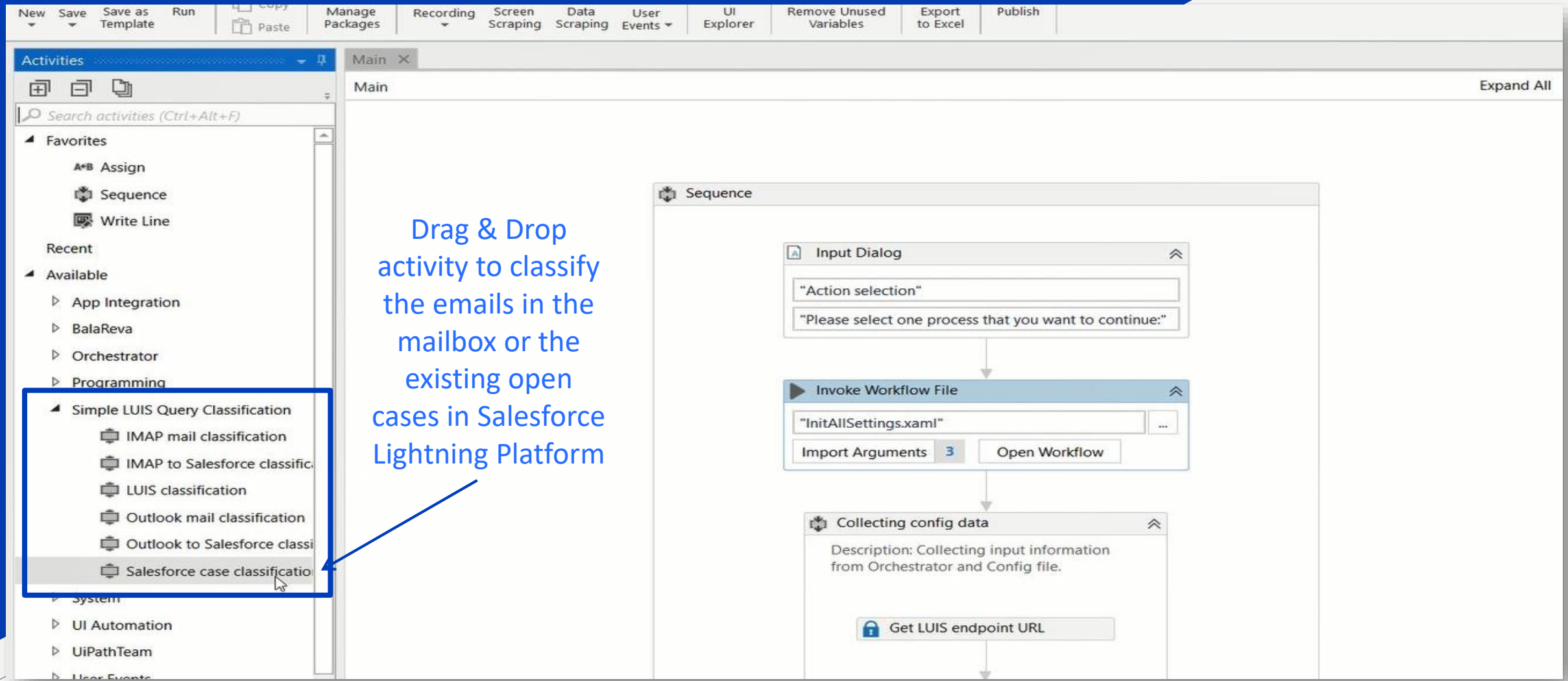
ICCA OVERVIEW

INTELLIGENT CUSTOMER COMMUNICATION AUTOMATION

Using UiPath combines with LUIS (Language Understanding Intelligent Service) to create a robot who can understand emails content and separates them to related categories in Salesforce or CRM Database.



ICCA: UiPath Custom Activity (1/2)



ICCA: UiPath Custom Activity (2/2)

The screenshot displays the UiPath Studio interface for a custom activity named "Simple_LUIS_Query_Classification". The main workspace shows a workflow diagram with the following steps:

- Case 2:** Contains the activity "IMAP_to_Salesforce_classifi".
- Case 3:** Contains the activity "Salesforce_case_classificati", which is currently selected.
- Add new case:** A button to add a new case.
- Write Line:** A step that outputs the text "ResultListText".
- Output Data Table:** The final output of the workflow.

On the right side, the **Properties** pane is visible, showing the configuration for the selected activity. The properties are organized into sections:

- Common:** Includes "DisplayName" (Simple_LUIS_Query_Classification).
- Input:** Includes "ExcelOutput", "ExcelOutputPath", "LUIS_URL", "SalesforceConsumerKey", "SalesforceConsumerS...", "SalesforcePassword", "SalesforceSecurityToken", and "SalesforceUsername".
- Misc:** Includes "Private" (checked).
- Output:** Includes "CaseList".

A blue arrow points from the text "Configure the settings to connect to Salesforce Lightning Platform" to the **Input** section of the Properties pane.

ICCA: Trained using Language Understanding Intelligent Services

The screenshot displays the LUIS interface for an application named 'Customer Query Email (V 0.1)'. The 'Intents' section is active, showing a list of intents: 'Complaint' and 'Compliment'. The 'Complaint' intent is selected, and its details are shown on the right. The 'Example utterance' table lists several phrases with their corresponding scores:

Example utterance	Score
your product name toyota productName getting error	0.94
there appears to be something wrong with your product	0.92
your product is so bad	0.98
we complained that your product is very bad	0.98

- The first step is by making a list of the intents that your application can resolve
- After identifying the intents, then create sample utterances that LUIS needs to map to your intents.

ICCA: UiPath Robot updated Salesforce Cases

The screenshot shows the UiPath Studio interface with a workflow for updating Salesforce cases. The workflow log on the left indicates the process involves updating case numbers and writing to an Excel file. The main window displays the Salesforce 'All Open Cases' list, with a green box highlighting the 'TYPE' column. A blue arrow points from the workflow log to the 'TYPE' column, indicating the data being updated.

CASE N...	CASE ...	SUBJECT	TYPE	STA...	PRIORI...	LAST MODIFIED D...	
1	00001113	Web	Bargain	Compliment	New	Medium	7/17/2019 8:28 AM
2	00001114	Web	Damaged goods	Complaint	New	Medium	7/17/2019 8:28 AM
3	00001115	Phone	A good shop	Compliment	New	Medium	7/17/2019 8:28 AM
4	00001116	Web		Empty query	New	Medium	7/17/2019 8:28 AM
5	00001117	Phone	Late order	Complaint	New	Medium	7/17/2019 8:28 AM
6	00001160	Email	Test only	None	New	Medium	7/17/2019 7:03 AM
7	00001161	Email	Reasonable price	Compliment	New	Medium	7/17/2019 7:03 AM
8	00001162	Email	Low quality product	Complaint	New	Medium	7/17/2019 7:03 AM
9	00001163	Email	Over-priced product	Complaint	New	Medium	7/17/2019 7:03 AM

After getting the response from the Language Understanding Service, the Robot will update the corresponding open cases in Salesforce Lightning Platform

ICCA FEATURES

INTELLIGENT CUSTOMER COMMUNICATION AUTOMATION

CLASSIFY EMAIL & OPEN SALESFORCE CASES

- Connect to your company mailbox.
 - Get all the new emails and send requests to the LUIS.
 - Update the Type of the case in Salesforce Open Case: whether the customer sent a complaint that needs to handle with care or customer sent a compliment or question-related. Correctly categorize inquiries from the customers to help the Customer Service team to deliver better Customer Experiences.

CLASSIFY EXISTING SALESFORCE CASES

- Connect to the existing Open Cases in Salesforce Lightning Platform.
 - Send requests to LUIS to classify the cases.
 - Update the Type of the case in Salesforce Open Case: whether the customer sent a complaint that needs to handle with care or customer sent a compliment or question-related. Correctly categorize inquiries from the customers to help the Customer Service team to deliver better Customer Experiences.

ICCA - LUIS Integration

Language Understanding Intelligent Service

INTELLIGENT CUSTOMER COMMUNICATION AUTOMATION

ICCA

Robot composes the request based on email subject & email text.

Robot sends the request to LUIS.

Robot gets back the response in which the email is classified into defined categories: Compliment, Complain, Generic or Question.

The Language Understanding Service can be further trained with additional data.



References

1. UiPath ICCA Source Code: <https://github.com/tranhuynhthanglong/ICCA/>
2. UiPath PowerUp 2019 Challenge: <https://uipath2019.devpost.com/>
3. ABeam Consulting: <https://www.abeam.com/>
4. Language Understanding Service: <https://www.luis.ai/>
5. UiPath Salesforce Connector: <https://go.uipath.com/component/connector-for-salesforce-lightning-platform/>

UiPath ICCA: Customer Centric Automation Starts NOW!






Thank You.

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