Customer Complain Routing Agent – User Manual

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1. Executive Summary

This solution demonstrates an **agentic automation** that continuously monitors customer survey feedback collected through **SurveyMonkey** and analyzes it using AI to determine complaint severity. Based on the classification, the agent intelligently routes actions, ensuring that normal and non-critical feedback is handled automatically without manual effort.

For **critical customer complaints**, the agent enforces a **human-in-the-loop approval** step before escalating the issue. Once approved, the agent sends a real-time alert via **Twilio SMS**, ensuring immediate visibility and faster response to high-impact customer issues. This approach improves customer experience, reduces response time, and provides a governed, enterprise-ready automation framework.

2. Solution Overview

The Customer Complaint Routing Agent is built using **Automation Anywhere Agentic Automation** to intelligently handle customer feedback in real time. Customer survey responses are collected through **SurveyMonkey** and retrieved using secure API tasks. The agent consolidates survey feedback and uses an **AI Skill** to classify each response as **Normal**, **Complaint**, or **Critical Complaint**.

Based on the severity, the agent follows deterministic routing logic. Normal and non-critical complaints are logged for tracking and analysis, while critical complaints trigger a **human-in-the-loop approval** to ensure governance and control. Once approved, the agent sends an instant notification through the **Twilio SMS gateway**, delivering the severity and customer feedback details to a verified mobile number. This solution enables faster response to critical issues, reduces manual monitoring, and ensures a controlled, scalable approach to customer complaint management.
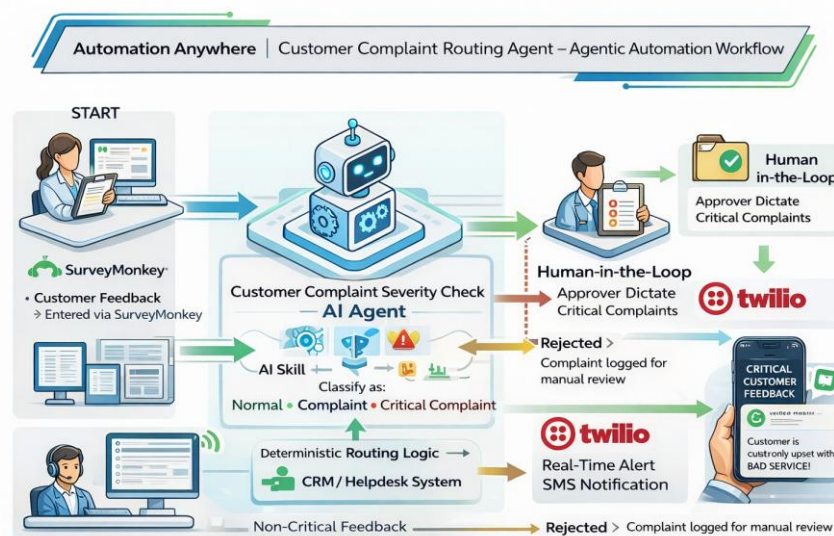
3. Key Benefits

- **Real-Time Complaint Detection:** Automatically analyzes customer survey feedback and identifies critical complaints as soon as they are submitted.
- **Faster Response Time:** Instantly escalates approved critical issues via **Twilio SMS**, reducing delays in addressing customer concerns.
- **Reduced Manual Effort:** Eliminates the need for continuous manual monitoring of survey responses by using AI-driven classification.
- **Governed Escalation:** Ensures control and accountability through a **human-in-the-loop approval** process before critical alerts are sent.
- **Improved Customer Experience:** Enables proactive issue resolution, helping organizations respond quickly to negative feedback and improve service quality.

4. Core Components

1. SurveyMonkey Integration (API Task)
Retrieves customer survey responses in real time using secure REST APIs.

2. Twilio SMS Gateway (API Task):
Sends real-time SMS alerts with severity and feedback details for approved critical complaints.

3. AI Agent (Agentic Automation)
Orchestrates the end-to-end workflow, coordinating tools, decisions, and execution.

4. API Tasks
Used to fetch Survey Details and notify severe feedback and responses

5. AI Skills
Analyzes customer feedback text and classifies each response as **Normal**, **Complaint**, or **Critical Complaint**.

6. Human-in-the-Loop (HITL) Approval
Ensures governance by requiring human approval before escalating critical complaints.

5. Process Flow

The following Swimlane Diagram shows interaction between the User, the Agents, and external systems.
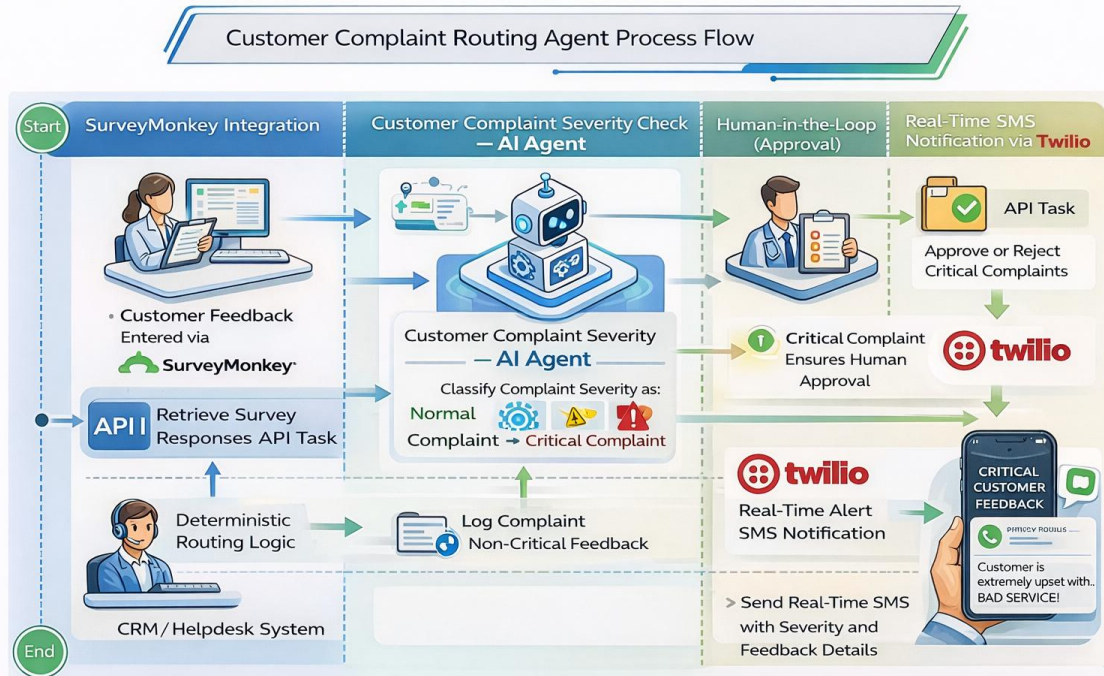

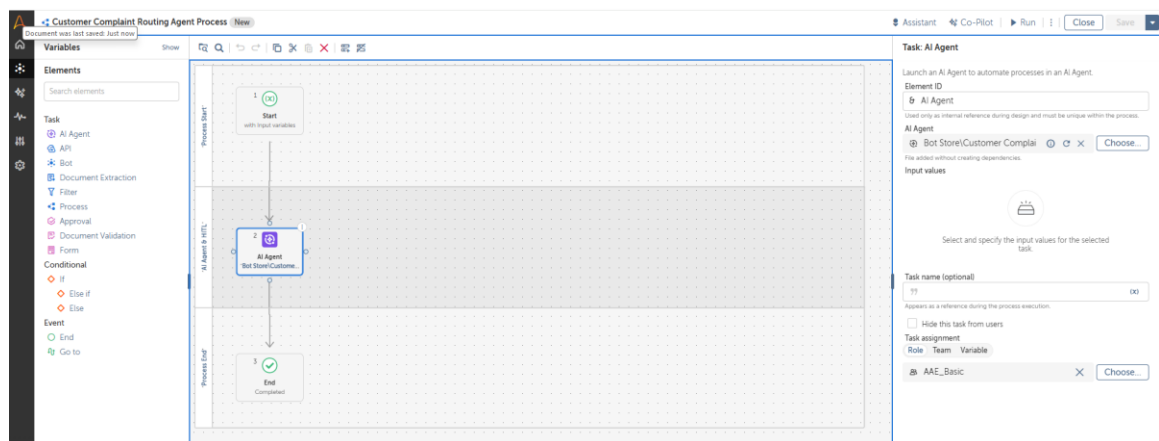Figure 2: End-to-End Process Flow

5.1 Step-by-Step Workflow

1. **Survey Submission**
   A customer submits feedback through the **SurveyMonkey** survey form.
2. **Agent Triggered**
   The **Customer Complaint Routing Agent** is triggered to start the workflow.
3. **Retrieve Survey Responses**
   The agent uses an **API Task** to fetch all available survey responses from SurveyMonkey.
4. **Consolidate Feedback**
   All text-based answers for each survey response are combined into a single feedback summary.
5. **AI-Based Severity Classification**
   The consolidated feedback is sent to an **AI Skill**, which classifies the complaint as **Normal**, **Complaint**, or **Critical Complaint**.
6. **Deterministic Routing Logic**
   The agent applies predefined rules based on the severity:
   - **Normal:** No action taken.
   - **Complaint:** Feedback is logged for reporting and analysis.

- **Critical Complaint:** Escalation path is initiated.

7. **Human-in-the-Loop Approval**

   For critical complaints, the agent requests **human approval** to ensure governance and control.

8. **SMS Notification**

   Once approved, the agent sends a real-time **SMS alert via the Twilio gateway**, including the severity level and customer feedback details.

9. **Logging and Reporting**

   All decisions, actions, and outcomes are recorded for auditability and future insights.

10. **Process Completion**

    The workflow completes after all survey responses are processed.

5.2 Prerequisites

- Automation Anywhere Control Room access – Including AI Agent & Ai Skills Access
- **SurveyMonkey account** with an active survey and API access enabled
- **SurveyMonkey API credentials** (Access Token and Survey ID)
- **Twilio account** (trial or paid) with:
  - Account SID
  - Auth Token
  - A verified phone number for SMS testing
- Survey Link as per Process for Manual submission :
  https://www.surveymonkey.com/r/N9LXXFB

6. Usage Guide

6.1 AI Agent

6.2 Tools

6.3 Tools Details

Sr No	Tool Name	Tool Description
1	Customer Complaint Routing Agent	This is the Customer complaint Routing Agent including integration of multiple tools listed below
2	Customer Complaint Routing Agent Process	This is the Customer Complaint Routing Agent process
3	Get Customer survey Tool	This is API Task to get all customer survey details
4	Customer complaint severity check Tool	This is API Task to check severity of customer feedback or responses
5	Send critical complaint sms	This is API Task to send critical survey details sms from twilio integration
6	Customer complaint severity classifier	This is AI Skills to find Severity based on customer feedback

6.4 How to Execute:

Step 1: Execute Customer Complaint Routing Agent Process Flow

Step 2: Go To AI Tools under Test to see current AI Agent Process

Step 3: Wait for Bot to process.

Step 4: Provide Approval for Severe Cases.

Step 5: Bot will be completed Automatically.

7. Troubleshooting

Issue	Probable Cause	Solution
500 Internal Server Error	JSON Parsing Error	Request "Create Issue" access for your project in Jira.

8. Important Note:

Please update the credentials before reuse. The credentials used in this process are **for demonstration purposes only** to showcase the workflow. For any commercial or production use, ensure that valid and secure credentials are configured before reusing the components.