Quick Guide: Understanding the Syndicated Conditional Chat Link widget (SCCL) with the Engagement Engine

This document is specifically for those using the Engagement Engine to deploy the Syndicated Conditional Chat Link.

This document provides helpful insight to deploying the Syndicated Conditional Chat Link widget with the Engagement Engine, and answers the following questions:

- *What is a Syndicated Conditional Chat Link widget?*
- *Where would I place the Syndicated Conditional Chat Link on my website?*
- *Are there any requirements for deploying the Syndicated Conditional Chat Link?*
- *Which Rule Evaluation Cycle is best for the Syndicated Conditional Chat Link?*
- *Do you have any hints for configuring the available Syndicated Conditional Chat Link options?*
- *Is there a common use case that we can reference?*
- *Where can I go for more information?*

What is a Syndicated Conditional Chat Link widget?

The Syndicated Conditional Chat Link widget (SCCL) is a link to chat that is deployed on an external web page when defined conditions are met.

Common ways to display the SCCL include displaying a chat button, a chat link, or a combination of both:
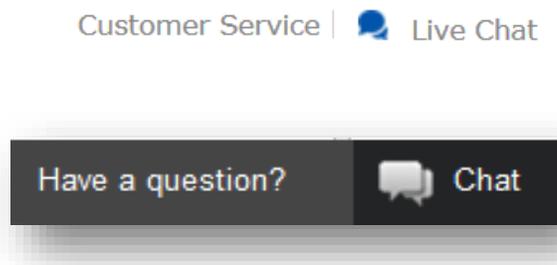
Most often, the conditions associated with the SCCL, (these conditions must be true in order for the chat button or link to show), are:
- The operating hours of the contact center
- Agent availability
- Wait time

Where would I place the SCCL on my website?

Companies tend to use chat as an alternative communication channel to a phone call, so for that reason the option to chat is often placed next to a phone number on a website (or altogether replaces the phone number). Placement of the SCCL tends to be in a universal header or footer of the site, also common on the *Contact Us* page, or where a phone number and email link are provided.

Common use cases for the SCCL are:

- Chat button or link on the banner of the web site
- Chat button or link across the bottom of the web site
- Chat button or link on the *Product* or *Contact Us* pages
- Replace phone numbers with chat buttons
- Alongside the option to send an email

Are there any requirements for deploying the SCCL?

- **Chat:** Oracle Service Cloud Chat must be enabled for your CX site
- **Engagement Engine:** The Engagement Engine Editor should be enabled for your CX site. Best practice is to deploy and manage the SCCL through the Engagement Engine when using Oracle Service Cloud Chat. If there are concerns with embedding a ubiquitous JavaScript tag on the customer's web site, reference the documentation on customer portal which explains how to deploy the SCCL directly on the external site.
- **External Web Pages:** The SCCL is only available for use on non-customer portal pages, so it can be deployed on your company's website. For example:

  - The SCCL **can** be deployed on *//www.oracle.com*
  - The SCCL *cannot* be deployed on *//custhelp.oracle.com*

Which Rule Evaluation Cycle is best for the SCCL?

When creating a rule that deploys a SCCL widget, the Rule Evaluation Cycle is a required field.

The Rule Evaluation Cycle is used to define when the rule should evaluate, and whether further rules should be processed while the current page is loaded. There are three options available.
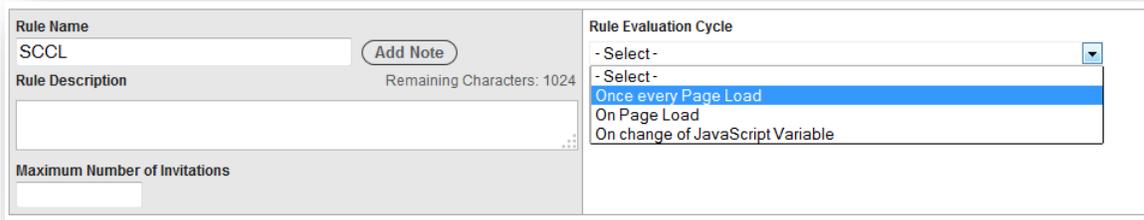
When deploying the SCCL, select *Once Every Page Load*. Meaning, the rule evaluates when the page loads and will not evaluate again until a new page loads, or the current page reloads. The *Enable Polling* option, can also be used as a polling mechanism with the SCCL widget. This ensures a good end-user experience with the chat request button being available as soon as the page loads and a consistent presentation to the visitor while they browse the page.

Do you have any hints for configuring the available SCCL Rule options?

There are many attributes that can be configured within the SCCL widget. A brief explanation of each attribute is provided, as well as helpful tips.

> NOTE: When passing in custom data to the SCCL widget, the RightNow Custom Data action must be placed before the RightNow CX: Display Syndicated Conditional Chat action in order for those values to be used by the widget. When setup like this, the values supplied by the Custom Data actions will override the corresponding values specified in the SCCL action.

- **Category** – The ID of the CX category to use. Only a single category may be used with chat. Category is used in conjunction with Product for chat advanced routing and reporting. The Category defined here can be overridden with a custom field action in the rule. Even if the chat pre-routing is not used for this widget (i.e. visitor input of Product/Category from the chat login page is used for routing), define the Product/Category for the SCCL widget so they can be used for the chat reporting.

- **Chat Login Page** – When an end-user opts to chat by clicking the chat button or link, the chat login page is displayed to the end-user. If this field is left blank the default chat login page (*/app/chat/chat_launch)* is used. If you prefer to bypass the chat login page, meaning you do not want the end-user to fill out the form and you are fine with taking anonymous chats, set this attribute to */app/chat/chat_landing*. If the chat login page is not used, after the end-user opts to chat they are immediately placed into the chat queue. The product/category defined for the widget is passed to the chat login page and used for routing.

- **Chat Login Page Height** – The height, in pixels, of the window to display. If *open_in_new_window* is set to false, setting this value has no effect. The default is 686 pixels.

- **Chat Login Page Width** – The width, in pixels, of the window to display. If *open_in_new_window* is set to false, setting this value has no effect. The default is 700 pixels.

- **Container Element ID** – The ID of the HTML element on the page that represents the container for the entire widget. This is not a required attribute. If present, a CSS class *rn_ConditionalChatLink* will be added to it. Customers may customize the css for this element to use their own look and feel. If a value is not entered, this field sends through a default value of *myChatLinkContainer.*

- **Custom Fields** – This attribute should be used if you want a default value for a custom field sent in with the chat request. JSON parsed array of custom fields. The array should be in the form of a key-value pair where the key is the custom field ID and the value is the value of the custom field. Ex: {"ID1":"VALUE1","ID2":"VALUE2"}

  Custom fields are defined in the CX console and then visible for chat. Chat visibility needs to be checked to become active. The following Incident custom field types are available for passing information within a chat:

  Text Field
  Date Field
  Integer
  Menu
  Text Area
  Yes/No
  Date/Time

  > **Custom Field Examples:**   You may wish to present the agent with the value of the consumers shopping cart or other information within the incident or chat pane. The Product/Category settings can also be changed using the custom field option (which will override the widget settings for these values).

- **Enable Availability Check** – Determines whether to check for agent session availability to display the SCCL. If set to *Yes*, the SCCL will display only after the agent session availability is evaluated. The *Minimum Sessions Available* option is described below and used in this evaluation. If a value is not selected the default value of *Yes* is used. For example:

  o If set to *Yes*, the available agent sessions are evaluated and the chat link displays if the defined number of *Minimum Sessions Available* is met

  o If set to *No*, the option to chat is available at all times regardless of agent availability or hours of operation. If there are no agents available to handle the session, the chat waits in the queue until an agent becomes available. You can inform the end-user of expected wait time by using *Available With Wait Time Label Template.* The option for *Wait Threshold* can also be used to control whether chat is offered. The *Default Message Label* is used when this option is set to No

- **Enable Polling** – If *Yes*, the widget will continually check for agent session availability, after the initial page has loaded. The default value of *Yes* will be used if a value is not selected. Customers should have polling enabled if they want to have the SCCL widget be available to customers as much as possible when agents are available or based on the widget attributes for their particular implementation. If the customer does not want the widget changing from showing chat is available and then not available (or vice versa) while the end user is viewing a page, then polling should not be enabled.

With the August 2015 version of CX, optimization has been done to limit the amount of polling by the widget. Now the amount of time the visitor spends on the page and the wait times are considered before the SCCL starts to throttle.

If using Engagement Engine, the polling evaluation occurs as follows:

- o If the wait time is less than or equal to 1 minute, this check will occur every twelve seconds for the first 5 minutes, then once per minute after that

- o If the wait time is greater than one minute, this check will occur at intervals of half the expected wait time (expected wait time/2 seconds).

For Standalone (without Engagement Engine) the polling evaluation will occur every twelve seconds for the first 5 minutes, then once per minute after that. Expected wait time is not used in the polling evaluation here.

When using the agent session availability check, the SCCL might not be available to a visitor with the initial page load. Enabling polling would repeat the agent session availability evaluation at intervals and then display the SCCL if the minimum agent sessions were to become available during the visitor's time on the page and providing access to chat. If polling is not enabled in this use case, the SCCL will be only evaluated for agent session availability at page load and not present even if during the visitor's time on the page the minimum agent sessions became available.

If not using *Enable Availability Check* option, the polling option is not used and should be disabled and *Minimum Sessions Available* set to 0

- **Ignore Pre-Route** – This attribute is used to specify whether or not to ignore the chat session pre-routing for this widget. The default value of *No* is used if a value is not selected.

  - o When this attribute is set to **No**, it means the widget will determine the appropriate chat queue based upon agent availability for that queue and chat routing rules. Product/Category definitions for the widget will be used for advanced routing. Any information supplied by the visitor on the *chat_launch* page will not be used to determine routing of the chat.

  - o When this attribute is set to **Yes**, it means the widget will determine the appropriate chat queue and agent availability for that queue based on the information available to the widget and the chat routing rules. However, Product/Category information supplied by the visitor on the *chat_launch* page will then be used to determine the chat queue based on the chat routing rules.

  - o For Example: Your chat routing rule is defined to send chats to Queue 1 if Product = Lawnmower, send chats to Queue 2 if Product = Outdoor Furniture (else, send to Queue 3).

- If Ignore Pre-Route is set to **No** and the product is set on the widget t*o Lawnmowers*, even if the shopper changes the product field on the chat_launch page t*o Outdoor Furniture*, the chat will still route to th*e Lawnmower* queue (Queue 1).

- If Ignore Pre-Route is set to **Yes** and the product is set on the widget to *Lawnmowers*, if the shopper changes the product field on the chat_launch page to *Outdoor Furniture*, the chat will route to the *Outdoor Furniture* queue (Queue 2)*.*The important thing to note is that if there are available agents servicing Queue 1, the SCCL will display that there are agents available without any wait. However, Queue 2 may have a wait time so the end user could end up having to wait in queue unexpectedly.

- **Information Element ID** – The ID of the HTML element on the page that represents the information that should be displayed for the widget. The information for this element may be served from one of the *label_xx* attributes. This is not a required attribute and information will be displayed only when the element exists on the page. The default value is *myChatLinkInfo* which will be used if a value is not specified. If the service is available but there is a wait, then it would display something like:

  Chat Now
  An agent should be available in 0:23 (0 Minutes and 23 Seconds)

The element can be separated from the link element so that it does not assume the styling of its parent and display like a hyperlink. Example:

  Chat Now
  An agent should be available in 0:23 (0 Minutes and 23 seconds)

- **Widget ID** – Specify a short meaningful label for the Widget ID field. This value will be used in the Chat Offer Effectiveness and ROI Report for statistics relating to this chat offer. We suggest using the EE rule name or a shortened, meaningful version of the EE rule name here.

- **Available Immediately Label Template** – Specifies the label to display when chat is immediately available, with no wait. The default value is "*Agents are available with no wait time"* and is used if no value is specified.

- **Available with Wait Time Label Template** – Specifies the label to display when chat is available, but there is a wait. The default value is "*An agent should be available in {TIME} {NUM_MINUTES} {MINUTES} {NUM_SECONDS} {SECONDS}"* and is used if no value is specified.

  o Usable macros include:

    - {TIME}: Displays minutes:seconds

    - {NUM_MINUTES}: Displays number of minutes

    - {MINUTES}: Displays minute or minutes label

- {NUM_SECONDS}: Displays number of seconds

- {SECONDS}: Displays second or seconds label

Note: As the default would display as "*An Agent should be available in 02:00 2 minutes 0 seconds*", this value should be modified to chose either time, or X minutes and X seconds.

- **Default Message Label** – Specifies the label to display when *Enable Availability Check* is set to *No*, or if an error is encountered while fetching the chat availability information. The default value is "*Chat directly with a member of our support team"* and is used if no value is specified.

- **Unavailable Hours Label** – Specifies the label to display when chat is outside of operating hours. The default value is "*We're sorry, chat is currently unavailable"* and is used if no value is specified. Chat hours are set within the CX interface.

- **Link Element ID** – The Link Element ID is a required attribute. This attribute is used in the tag for the widget shown below the image. This tag needs to be placed on the page where you would like the widget to be displayed. If you have multiple SCCL widgets being displayed on a page, then the *Link Element ID* must be unique for each widget. The recommended value is *myChatLink*. Example of the recommended DIV's for the widget:

```
<div id="myChatLinkContainer">
    <div id="myChatLink">
        <div id="myChatLinkInfo">
        </div>
    </div>
</div>
```

- **Minimum Sessions Available** – This option is used in conjunction with the Enable Availability Check and specifies the minimum number of open agent sessions that must be available in order for the link to be actionable. If this option is to be used, it must be set to a value of 1 or greater. If set to 0, the trigger is disabled which also disables the agent availability check and polling options. The *Minimum Available Sessions* will <u>always</u> override *Wait Threshold*.   Meaning that if a value is set for the minimum number of sessions that need to be available, even if the current wait threshold is met, the chat will not be displayed until the minimum available sessions is also met.

- **Open in New Window** – If set to *Yes*, the page defined by *chat_login_page* will be displayed in a new window. If *No*, the current window will navigate to that page. Chat window height/width pixels specified will not be used if set to *No*. The default value is *Yes* and is used if a value is not specified.

- **Product** – The ID of the CX *Product* to use. Only a single product may be used with chat. Product is used in conjunction with Category for chat advanced routing and reporting. The Product defined here can be overridden with a custom field action in the rule. Even if the chat pre-routing is not used (i.e. visitor input of Product/Category from the chat login page is used for routing), define the Product/Category for the SCCL widget as it will be used for the chat reporting.

- **Wait Threshold** – Specifies the maximum wait time threshold where a SCCL widget will be displayed. If the current wait time exceeds this value, the SCCL widget will not be displayed. This trigger is disabled when set to

0. The number of available sessions will always override wait threshold; the available session criteria must also be met. The default value is 40 seconds and used if no value is specified. For example, if the wait threshold is set to 40 seconds and the current wait time is 45 seconds, the SCCL will not be displayed until the current wait time is below 40 seconds and the minimum number of agent sessions is also met.

Where can I go for more information?

For more information about the **Syndicated Conditional Chat Link** widget, refer to the latest Oracle Engagement Engine Cloud Service Online Documentation available here:

http://www.oracle.com/technetwork/indexes/documentation/engagementengine-1942670.html