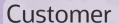
Oracle B2C Service

24B Roadmap



Web Chat for Service

- Page Peek and Visitor Browser History support
- Custom icon support for avatars and system messages
- Agent name customization for privacy
- Allowed file types can now be customized for file sharing
- No inline CSS

Knowledge Advanced

 View attachment from recommendation

Documentation



Agent

Agent Chat

- Suggestions for agents in the engagement panel
- Report on Agent Preferences
- o Report on *Not in Focus* Chat Time
- Create custom Action Buttons for the chat panel
- Language translation for Chat Agents Workspace
- Agent Insights ODA Integration for Response Suggestions
- Mentions support for private notes
- Disable parent node in menu fields if not selectable
- Attachment Image Viewer
- Custom Config to make all attachments private by default

Analytics

 Honoring of chart data label formatting in BUI

Knowledge Advanced

- Filter search results for accounts by content type privileges in BUI
- Get to more facets in BUI

A

Administrator

Enhanced Business Rules

- Deployment time reduction
- Execute Task Object Events
- Export usage statistics to CSV file

Admin UI

- New Enhancement Alert
- Config Assistant Card

Element Manager

- Limit maximum package size
- Modify config verbs and msg base values at import
- Import progression indicator
- Elem type in dependencies view
- Notify of Export Completion

Data Lifecycle Policy

- o Enforce range filters in a DLP
- Purge chat transcripts Custom policy

SPM/CPM Framework

Support Async CPMs for Tasks Service Usage Metrics

Relative threshold based alerting for sessions usage

Knowledge Advanced

Report on access type in more tables

Integrator

External Objects & Integrations

- Custom Parameters for authentication
 Service Health Metrics
- API for returning health metrics

Event Delivery Service

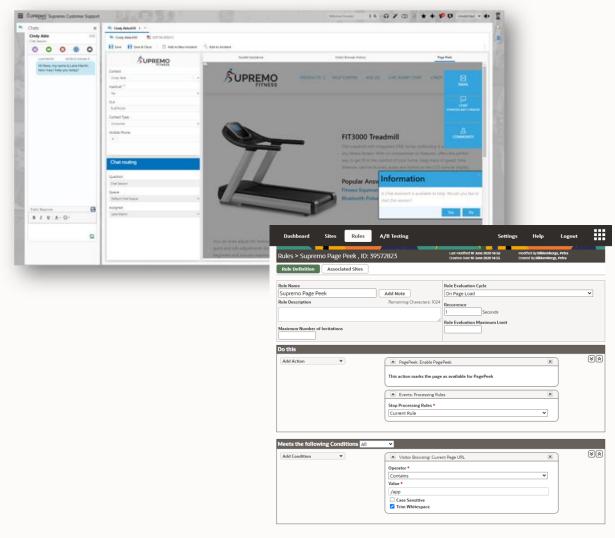
- Microsoft Azure Event Hub support
 Accelerators
- Share Your Feedback about Accelerators

Legend

- ☐ Web Chat for Service Upgrade
- Pushed in bi-weekly builds
- Requires 24B Upgrade
- Requires Engagement Panel Update

Visitor Browser History and Page Peek

Web Chat for Service





Capability Highlights

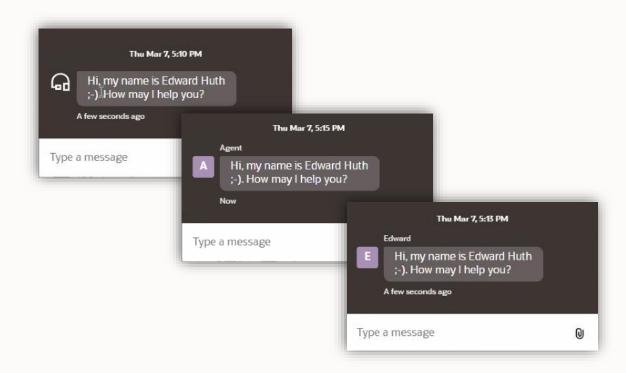
- Visitor Browser History: Allows a Chat Agent to see which URLs the end-user has visited, prior to chatting with the agent, within a current browser session.
- Page Peek: Allows agents to see the page the end-user was viewing when they requested a chat.

- Agent context: Give the agent a wider context in his desktop during the chat interaction to give a quicker and more accurate response.
- **Improve customer experience:** Better agent insight leads to reduced chat handle times.
- Business Agility: Easily meet changing business requirements while enabling highly personalized user experiences with Engagement Engine rules.



Agent Name Customization

Web Chat for Service



- · noName The name of the agent is not shown
- fullName The name received from the chat server (default value)
- firstName First 'word' of the name received from the chat server
- lastName Last 'word' of the name received from the chat server
- defaultName Value from the custom text key agent (See ODA Native Client SDK for Web)



Capability Highlights

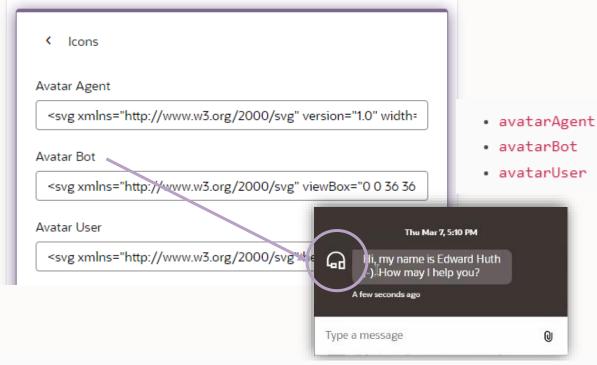
- New agentNameMode attribute: The name of the agent can be removed or customized in the conversation.
- Personalize according to desired service process: Ability to copy an Embedded Service component and make changes to the new version.

- **Agent privacy:** Options to show a custom agent name in the chat conversation.
- Business agility: Easily meet changing business requirements while enabling highly personalized user experiences with Engagement Engine.



Default Icon Values

Web Chat for Service



- infoMessage icon shown when the system user posts an information message
- warningMessage icon shown when the system user posts a warning message
- errorMessage icon shown when the system user posts an error message
- downloadMessage icon shown when the system user is downloading an attachment
- offTheRecordOff menu icon that indicates that off the record is disabled
- offTheRecordOn menu icon that indicates that off the record is enabled

Capability Highlights

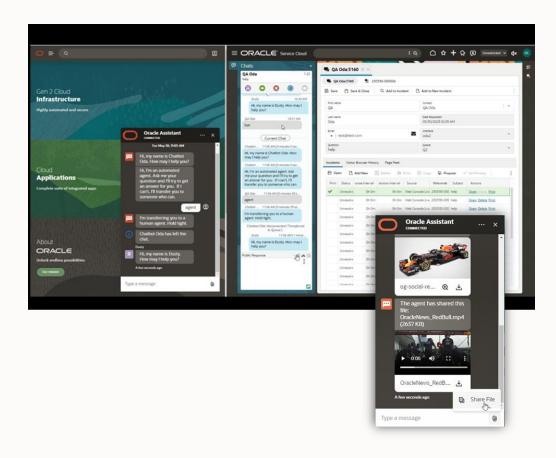
- Default icon links: Default values for the existing icons such as avatars and system messages
- Personalize according to desired service process: Ability to customize the icons according to your company brand identity.

- Flexible branding: Option to use the default values or your own icon strings.
- Business agility: Easily meet changing business requirements while enabling highly personalized user experiences with Engagement Engine.



Allowed File Types Can Now be Customized for File Sharing

Web Chat for Service



Capability Highlights

- New attachmentSettings attribute in Engagement Engine: To set file upload and download settings depending on your service. To avoid server side validation when uploading invalid file types, make sure that WCFS is configured with those that the server will accept or with a subset of them.
- Define supportedFileTypes to allow or restrict file types: The B2C default files types for WCFS 24B and higher are: png jpg txt gif pdf docx bmp doc csv xlsx xls jpeg odt odm ods odp odf msg eml rtf ppt pptx htm html zip wav mov mp4 mp3

- Optimized Engagement: An end-user or agent can exchange files during a chat conversation to resolve the issue.
- Share context in allowed file formats:
 Avoid uploading invalid file types in Web Chat for Service.

No Inline CSS

Web Chat for Service





Capability Highlights

 No inline CSS: WCFS now has a setting to turn off the inline CSS insertion.

- **Security:** This allows you to have a tighter content-security-policy.
- **Business agility:** Easily meet changing business requirements while enabling highly personalized user experiences with Engagement Engine.



View Attachments on Recommendation in CP

Knowledge Advanced

Account Overview

RE: What is Globalization Testing?

Status New

Date Added 01/24/2024

Requested By Joe Bloggs

Recommendation

Could you add screenshots of the steps, see attachment for examples.

Attachment

ScreenShots.docx

MAL Coverites

Capability Highlights

- View the fact that your recommendation has an attachment
- Download the attachment from your recommendation

Key Benefits

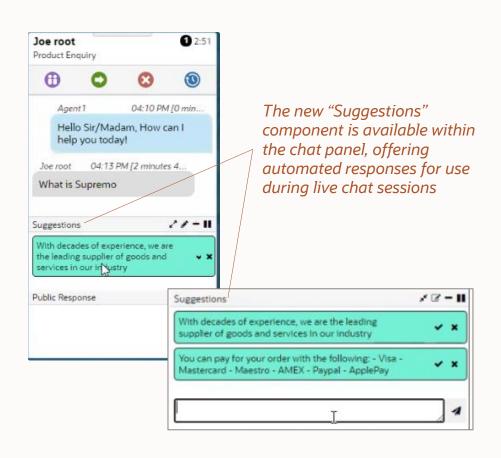
Reassurance that your attachment is intact on your recommendation



Suggested Chat Responses*

Agent Chat





Capability Highlights

 Oracle Digital Assistant automatically suggests chat responses to agents during live chat sessions

Key Benefits

 Employee Optimization: Enhance usability efficiency and personalization for agents handling chats in the browser user interface

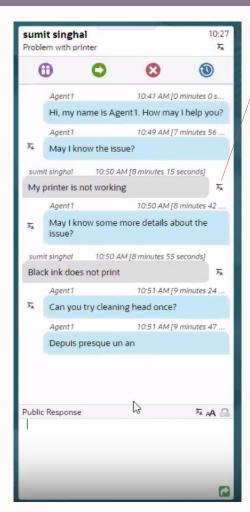
> *Early Adopter phase - If you are interested in being an early adopter of this feature, please contact <u>jessica.bradley@oracle.com</u> to learn more



Automatic Translation*

Agent Chat



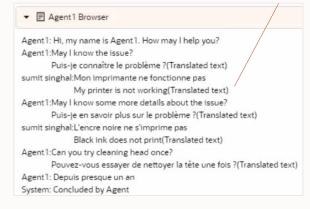


Agents can easily enable & disable translations within live chat

Customers chat in their preferred language

Agent1 (Listening)
 Agent1: Hi, my name is Agent1. How may I help you?
 Agent1: Puis-je connaître le problème?
 sumit singhal: Mon imprimante ne fonctionne pas
 Agent1: Puis-je en savoir plus sur le problème?
 sumit singhal: L'encre noire ne s'imprime pas

Translated text is shown on the incident



Capability Highlights

- OCI Language Translation is now available during live chat sessions
- Agents receive messages in the language set on the interface, also enable/disable the feature within a new Preferences option
- Customers receive messages in their preferred language

Key Benefits

Employee Optimization: Enhance usability efficiency for agents handling chats in the browser user interface

*Early Adopter phase - If you are interested in being an early adopter of this feature, please contact <u>jessica.bradley@oracle.com</u> to learn more







Chat Agent Personal Profile Settings Search Staff Accounts Staff Account Name Staff Account Display Name Maximum Active Chats Stagger Incoming Chats Time(seconds) 10 Bruce Parker Bruce Parker 2 5 Luke Edwards LukeEdwards David 2 10 David Navara Ryan Reed Ryan Reed 20 2 10 Charles Robson Charles Robson 7 Simon Haves Simon Haves

Capability Highlights

 Understand personal agent settings for the max chats & stagger chat settings

Key Benefits

 Efficiency: Admins can easily understand agent settings when troubleshooting frequently asked questions







Total Chat Duration(s)	Total Not In Focus Duration(s)	Not In Focus Interval(s)
244	56	46,10
285	63	27,36
77	34	23,11
82	42	12,22,8
39	13	13
38		12,10

This sample report was created using custom reports, to illustrate how the new chat data can be used

Capability Highlights

 Understand "not in focus" details for chat sessions handled within the Browser UI

Key Benefits

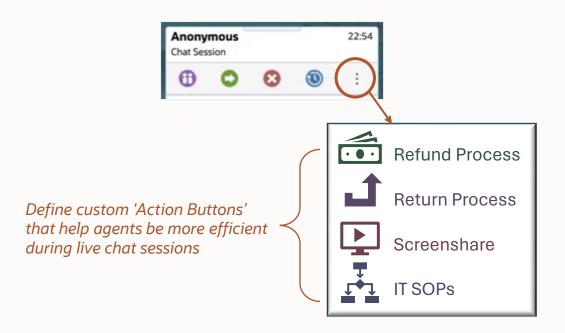
 New Chat Metrics: Admins have more data related to active chat sessions, for improved reporting on when a chat is not in focus



Crate custom 'Action Buttons' for the Chat Panel



Agent Chat



Capability Highlights

Implement custom buttons within the chat panel for agents to utilize during active chats

Key Benefits

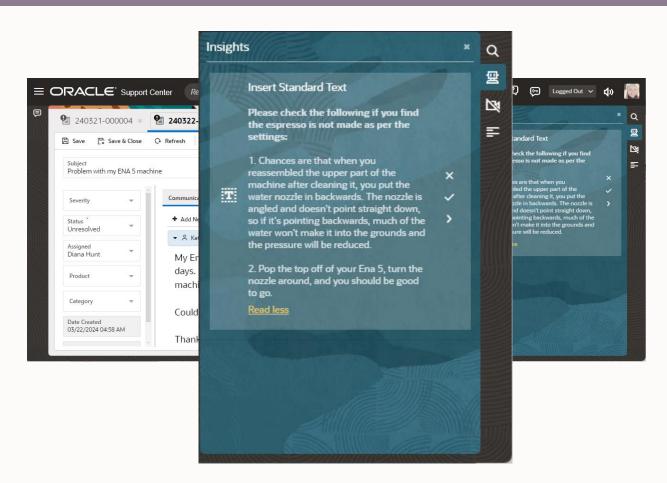
Employee Optimization: Enhance usability & efficiency for agents handling chats in the browser user interface



Realtime Response Suggestions*

Agent Insights





Capability Highlights

Oracle Digital Assistance integrated with Agent Insights will auto suggest Standard Text Responses

Key Benefits

Employee Optimization: ODA will improve efficiency and help agents get operational tasks done faster using the Agent Insights Panel

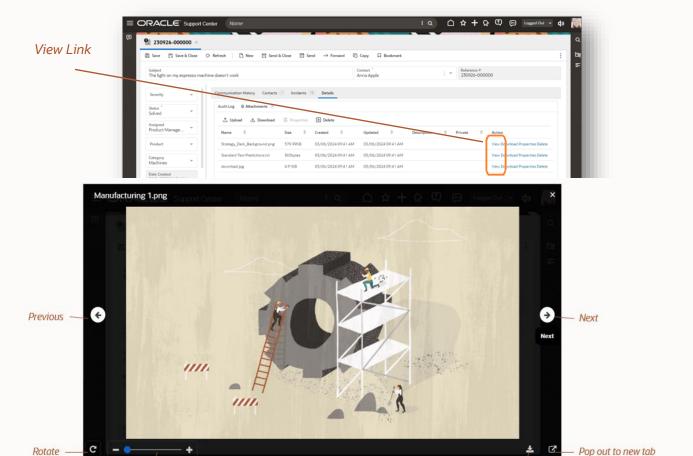
*Early Adopter phase - If you are interested in being an early adopter of this feature, please contact <u>diana.hunt@oracle.com</u> to learn more



Attachment Image Viewer

Workspaces





Capability Highlights

 Preview all attachment files with Next and Previous arrows

Key Benefits

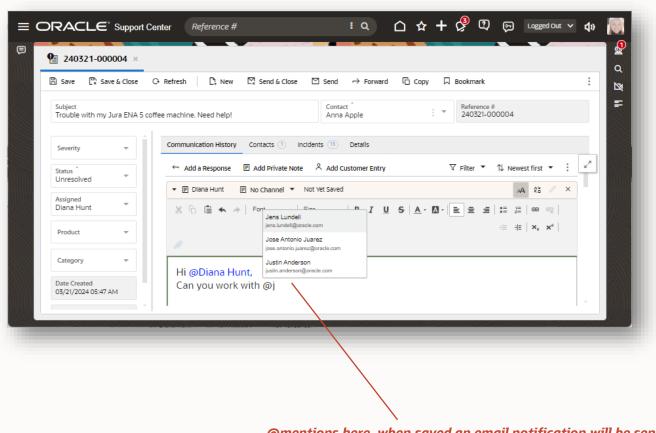
• **Employee Optimization:** Enhance usability efficiency and personalization for agents handling chats in the browser user interface



Download

Zoom

@Mentions Workspaces



Capability Highlights

 Agents can @mention staff accounts to incident response threads and the mentioned agent will receive an email notification.

Key Benefits

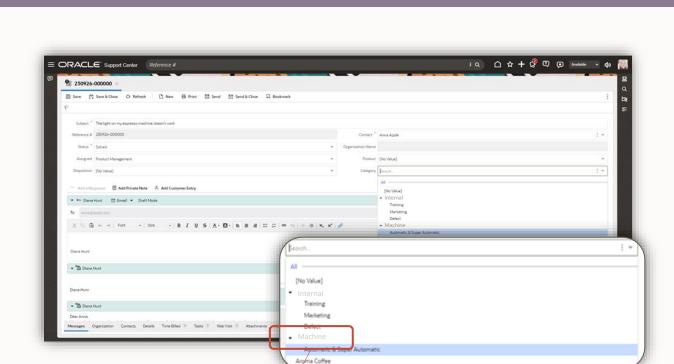
 Employee Optimization: Enhance usability efficiency and personalization for chat agents working in the browser user interface

@mentions here, when saved an email notification will be sent to the tagged account



Disable Parent Node

Workspaces



Parent node is disabled



 Parent Node in menu hierarchy fields will be disabled when it is not a valid value

Key Benefits

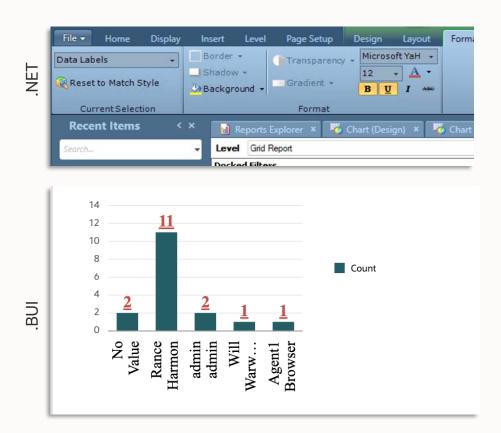
Employee Optimization: Enhance usability efficiency for agents working in the browser user interface



Honoring Chat Label Formatting and Hiding Grid Lines



Analytics



Capability Highlights

- **Data Label:** Honors chart data label formatting in BUI
 - Exception Text Box Outline & BG color.
- **Hide Grid Lines:** Honors hide chart grid lines in BUI
- **Secondary Axis:** Displays secondary axis except for sync scale formatting

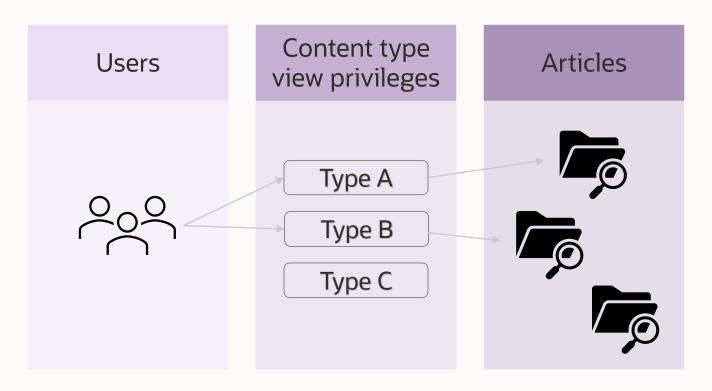
Key Benefits

Visibility: This enhancement provides better visibility as the report admins design a report with formatting to make the data more visible, which will be honored in BUI to make it more visible in BUI as well



Filter Search Results for Accounts by Content Type

Knowledge Advanced



Capability Highlights

Control which content types users get search results from in Browser UI

Key Benefits

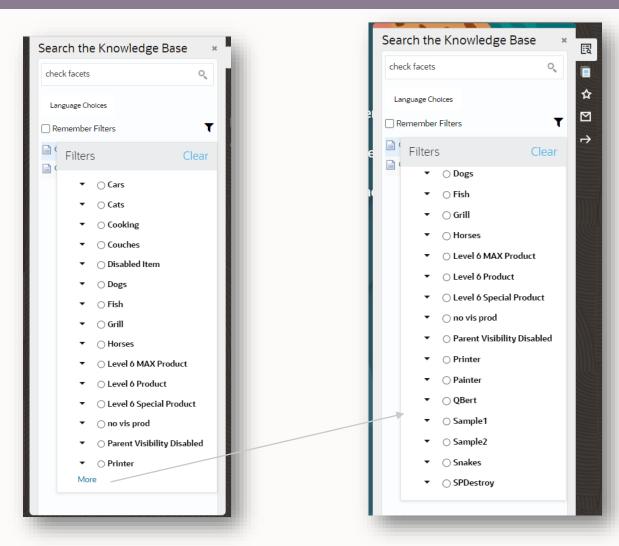
[Date]

Consistent filtering behavior between the various Knowledge panels in Browser UI



Get More Facets in BUI

Knowledge Advanced





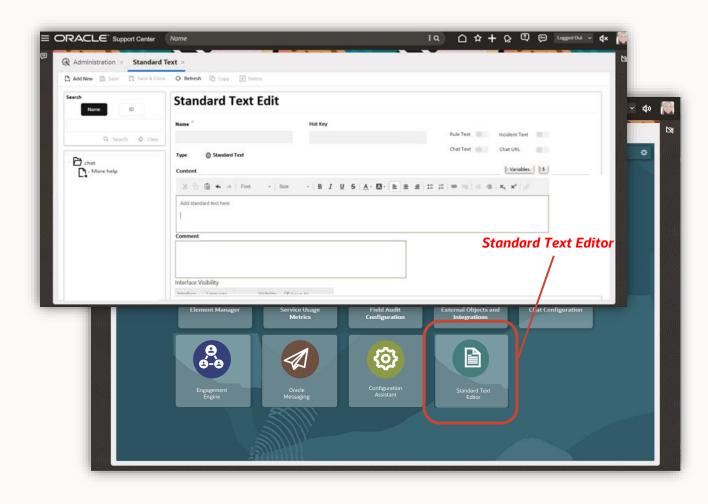
 Navigate to your full list of sibling filters fore result sets in which more than 20 are present



Standard Text Editor

Administration UIs in BUI





Capability Highlights

Standard Texts can be created in the browser UI

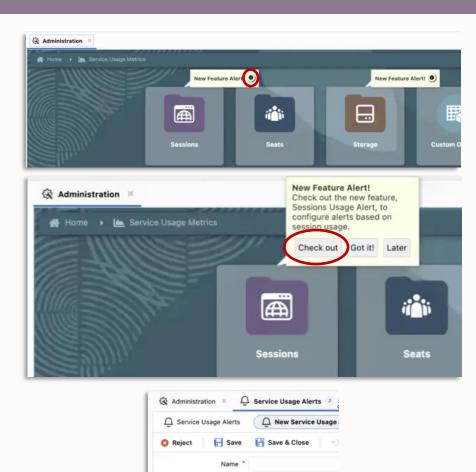
Key Benefits

Supervisor Optimization: creating content that is used multiple times to maximize agent efficiency



New Enhancement Alert

Administration UIs in BUI



Enabled Yes



Capability Highlights

- New Feature Alerts: Alerts about new enhancements under Admin tiles
- Check Out: Option to directly check out the feature
- Later: Option to review the feature later
- Got It: Option to hide the feature alert from future

Key Benefits

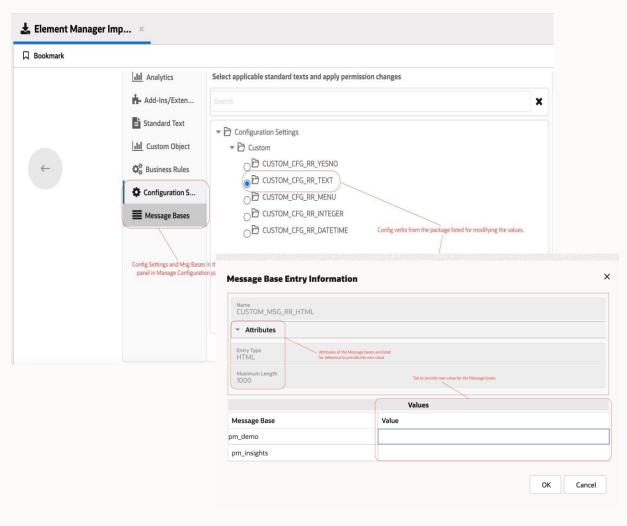
 Awareness: Heps admin to improve the awareness about the availability of new valuable features in Admin UI



Modify Config Verbs and Message Base Values during Import



Element Manager



Capability Highlights

- Modify values: The ability to modify value for Configuration Setting and Message Base elements during import.
- Support for Site and interface: The admins can modify the values for site level and interface level configuration settings.

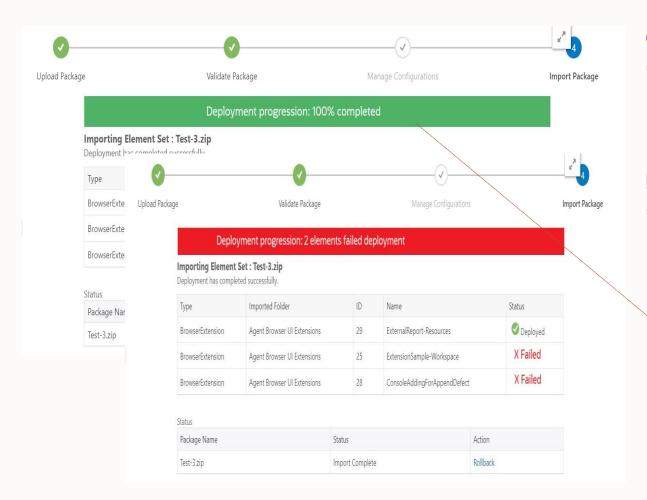
Key Benefits

 Agent productivity: Eliminates the need to change the values of configuration settings and message bases post deployment.



Import Progression Indicator During Import

Element Manager



Capability Highlights

 Progression Status: A deployment progression bar indicates the progress of import. A green bar indicates successful import and a red bar indicates deployment errors.

Key Benefits

 Intermediate Information: Provides information about number of elements deployed out of the total elements in the package, and import status.

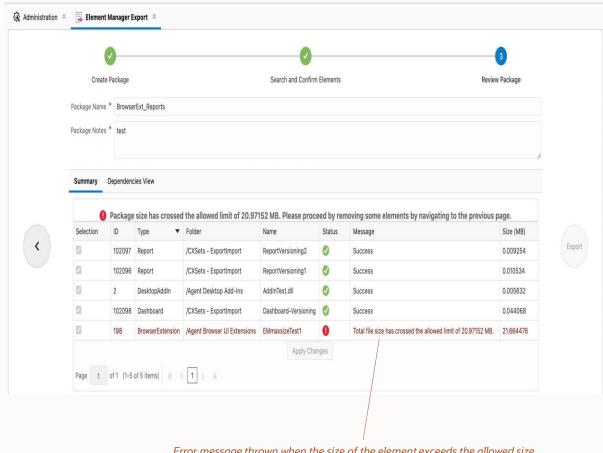
Deployment status bar indicating the progress of import. A green bar indicating success and a red bar indicating deployment errors



Limit Package Size to Prevent Out of Memory Issues



Element Manager



 $\label{lem:expectation} \textit{Error message thrown when the size of the element exceeds the allowed size limit during export}$

Capability Highlights

 Package Size: The size of the package and individual elements are displayed in 'Review' and 'Import Package' page.

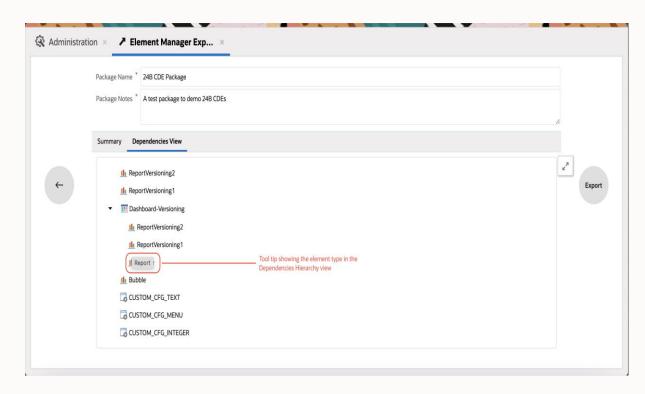
- Efficiency:
 - Export Error message: Alerts admins of the size of the elements and package and avoids creating oversized packages that will result in error during import.
 - Import Error message: A proper error message about the size of the package is provided and enables admins to retry the import with a package lesser in size.



Display Element Type in Dependencies View

Element Manager





Capability Highlights

Element Type: Displays element types in the Dependencies hierarchy view during export.

Key Benefits

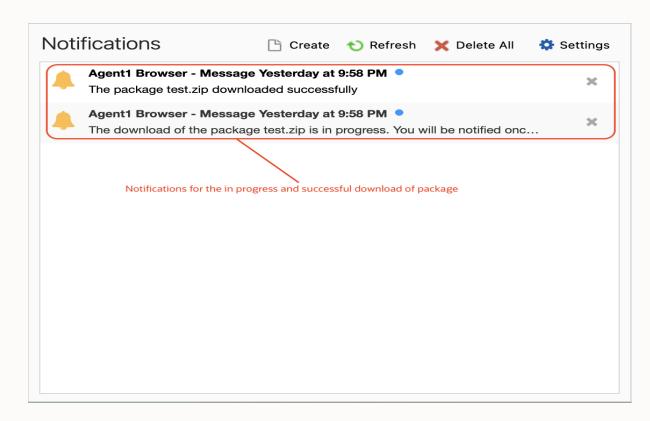
Dependent Elements: The admins can know the type of the dependent element from the dependencies hierarchy view.



Notify of Export Completion

Element Manager





Capability Highlights

 Notifications: Notification for in progress and successful download of package during export.

Key Benefits

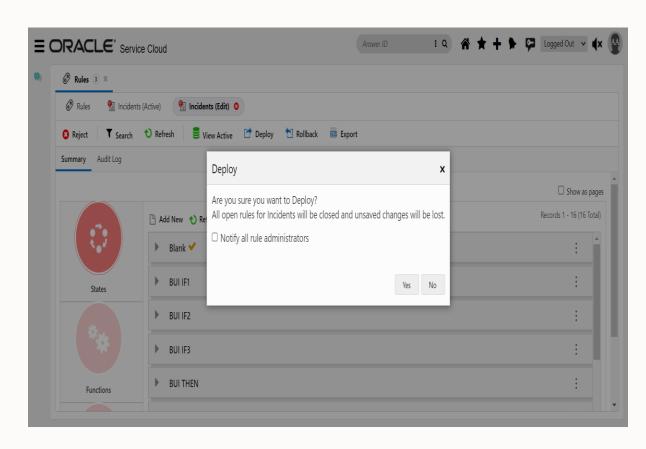
 Information: The admins will become aware of the status of the download of a package with these notifications.



Rule Deployment Time Reduction

Enhanced Business Rules





Capability Highlights

 Delta Deployment: The Rules service will deploy only the changes made to the rule base instead of the entire rule base.

Key Benefits

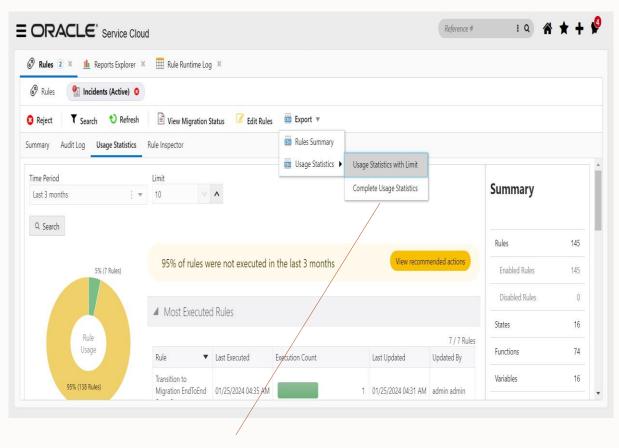
 Performance: The time taken to complete the deployment is drastically reduced and allows admin to continue editing rule base.



Export Usage Statistics to CSV

Enhanced Business Rules





Capability Highlights

- **Export stats with limits:** Ability to export the business rules execution stats of a specific time period and limit.
- Export complete Stats: Ability to export the business rules execution stats of the last year.

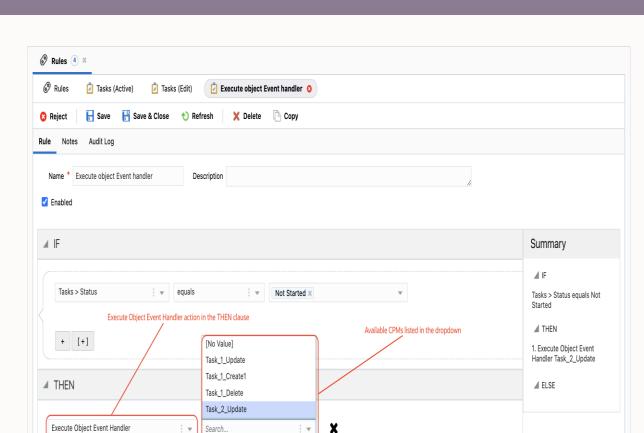
- Better Insights: Provides the ability to filter rules within a state, Last executed date, Execution count etc....
- Offline Storage: Enables customers to keep a store of the execution information offline for extended period and perform further analysis.





Execute Object Event Handlers for Tasks

Enhanced Business Rules





Capability Highlights

CPMs for Tasks: Trigger async CPMs on Tasks via Rules.

Key Benefits

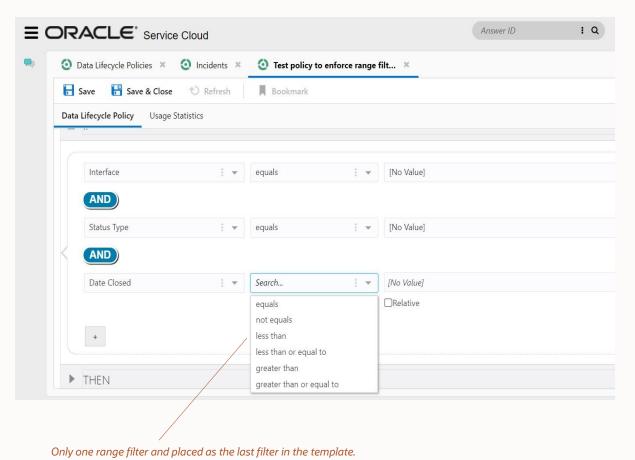
 Automation: Enables customers to automate business actions on tasks using async CPMs via Rules.



Enforce Range Filters in a Policy

Data Lifecycle Management





Capability Highlights

- **Limit on range filters:** Limit the number of range filters in a DLP to one.
- **Position of range filters:** A single range filter will be allowed as the last filter of the template.

Key Benefits

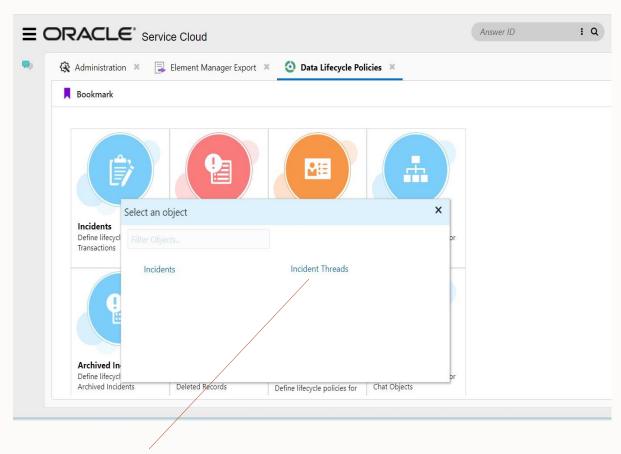
Performance: Improves the performance of the policies by limiting the number of rows to be queried for the policies.



Custom Policy to Purge Chat Transcripts

Data Lifecycle Management





Incident Threads supported in Data Lifecycle Policies

Capability Highlights

 Custom Policy: Ability to define a custom policy to purge Incident Threads of type Chat transcripts.

Key Benefits

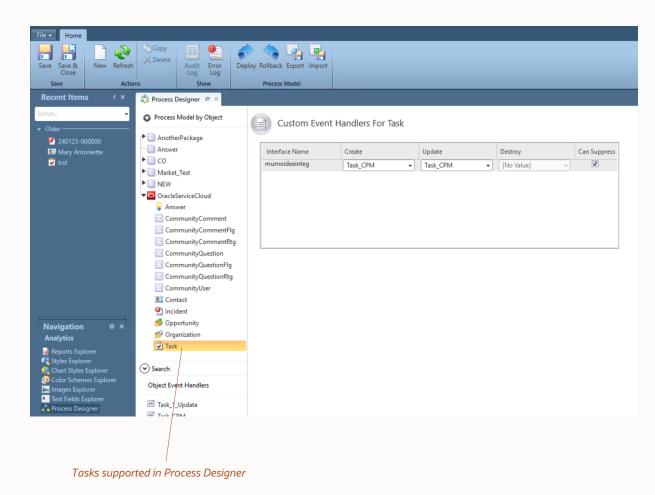
 Lean Active DB: Allows customers to maintain a lean active database by defining purge policies on Chat transcripts.



Support Async CPMs for Task Object

SPM/CPM Framework





Capability Highlights

 Async CPM: Ability to create a async CPM on Task object using Process Designer.

Key Benefits

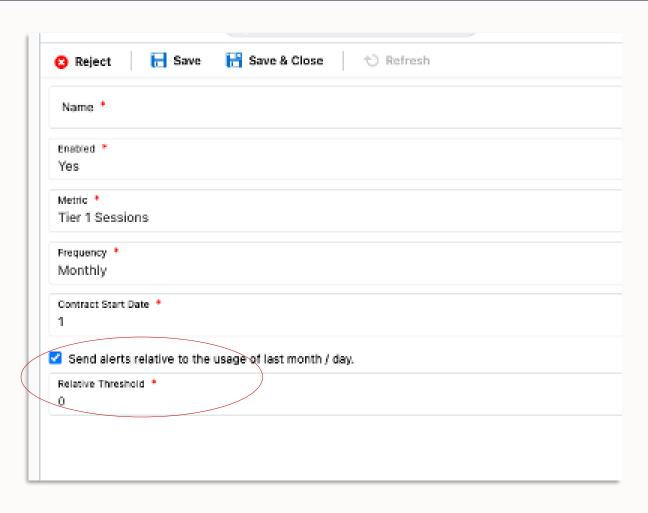
 Automation: Enables customers to automate business actions on tasks using async CPMs.



Relative Threshold Based Alerting of Session Usage



Service Usage Metrics



Capability Highlights

 Relative Threshold: Configure alerts based on relative threshold which compares the current usage in relation to the previous usage

Key Benefits

 Surge-based alerting: This enhancement provides an option to receive alerts based on a sudden surge or dip



Report on Access Type in More Tables

Knowledge Advanced



Access Type	Clickthru Rate	Question Count
TeamA	81%	48523
TeamB	0	2
TeamC	75%	598
TeamD	0	2
TeamE	0	1
Record Count: 5		

Capability Highlights

- Control the access type values stored in your reporting data
- Segment your knowledge usage by access type

Key Benefits

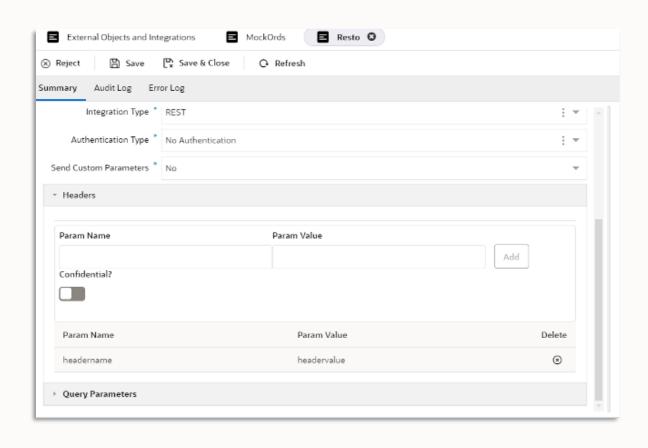
 Add a dimension to your knowledge usage data that is specific to your company



Custom Parameters for Authentication

External Objects & Integrations





Capability Highlights

- Custom Parameters: Custom parameters, like headers & query parameters, can be added to authenticate with more third-party services
- Save as Secret: Custom Parameters can be saved as secret to prevent exposure in UI, and also saves the value securely.

- Easier Integration to 3rd Party Services:
 Connections can be made to third-party external services that have unique or custom authentication parameters
- **Security:** Secrets will be saved securely in vaults



Support Microsoft Azure as a Destination

Event Delivery Service



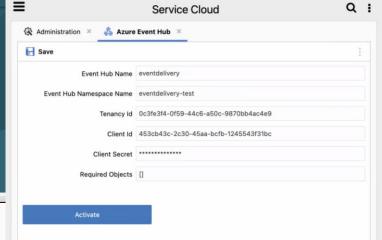


Capability Highlights

- Additional destination: Deliver OSvC events in Microsoft Azure Event Hub.
- Ul for configuration: Provides a Ul to configure the Azure Event Hub credentials.

Key Benefits

 Extensibility: The customers can process the OSvC events in MS Azure cloud platform without the need to onboard to Oracle Cloud platform.



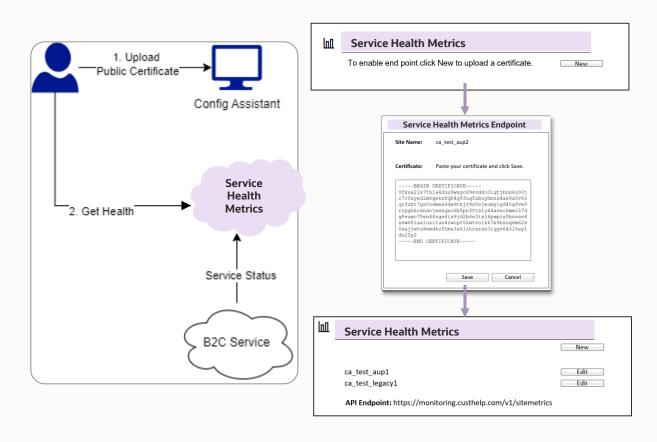


A card for configuring the credentials of Azure Event Hub

APIs for Returning B2C Service Health Information



Service Health Metrics



Capability Highlights

 REST APIs can be included in existing dashboards so that operations teams can observe the status of the CX service

Key Benefits

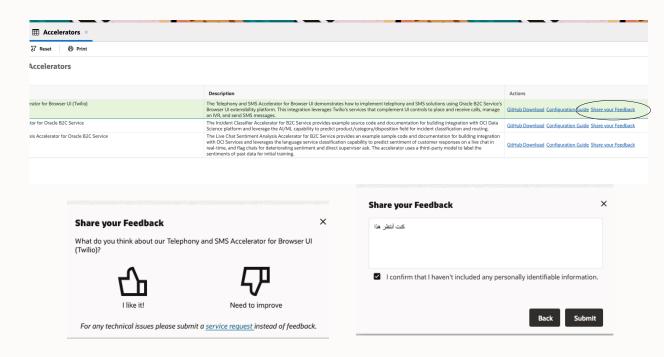
 Observability: Provides data for the overall health of the CX service, where such data was not previously available



Share Your Feedback About Accelerators

- For

Accelerators



Capability Highlights

- Feedback Collection: Admins can now provide feedback on accelerators which can be used to improve the accelerators
- Suggestion: Admins can use the feedback for suggestions to develop related accelerators

Key Benefits

 Direct Feedback: Admin can give direct feedback on accelerators making the process quicker and easier



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