Oracle B2C Service
24D Release Materials

November 2024

24D Roadmap

Customer

Customer Chat
- ❑ Conditional Chat Link to prompt in line of page context
- ❑ B2C Chat Offer Effectiveness
- ❑ Conditional Launch Button Details to allow polling on multiple queues
- ❑ Field pattern validation on chat form
- ❑ Dynamic fields on chat form
- ❑ Control attachments on agent side
- ❑ Sensitive Information detection in the subject
- ❑ Improved cross site scripting prevention and form security
- ❑ Post conversation message link
- ❑ Longer text field for icons

Customer Portal
- ❖ Calendar Date Picker Widget
- ❖ KA - multi-facet support for OR
- ✓ KA - content grid support
- ✓ KA - link to search results from suggestions widget

Agent

Agent Chat
- o Additional reporting on Chat Agent Preferences
- ➤ Option to Send a Zoom Link During a Live Chat

Incidents and Agent Insights
- o Incident Thread Translation
- o Execute Agent Insights by Default
- o Workspace Control Enhancements

Analytics
- o Scheduling reports as XLSX Excel attachment
- o Column header Auto-filter criteria
- o Move reports out of deferred execution from BUI

Administrator

Enhanced Business Rules
- ❖ Outbound SMS via Responsys

Element Manager
- ❖ Customizable menus support
- ❖ Product, category, and disposition support

Data Lifecycle Management
- ❖ Customer defined retention period for transactions

Job Scheduler
- ❖ Job Scheduler

Administrative User Interfaces
- o Hot Topics*

Knowledge Foundation
- ❖ Editor anchor support
- ❖ Editor color coding support

Knowledge Advanced
- ✓ Require remove after date

Developer

Event Delivery Service
- o Admin UI for OSS credentials

External Objects & Integrations
- o Allowed API Methods

Service Health Metrics
- o Chat Service Support

Legend
- ❑ Web Chat for Service Upgrade Required
- o Pushed in bi-weekly builds
- ❖ Requires 24D Upgrade
- ➤ Requires Engagement Panel Update

Roadmap Strategy

Customer Experience

Agent Experience

Administrator Experience
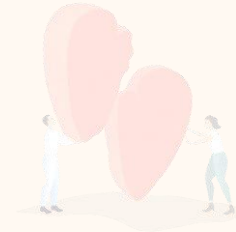
Developer Experience

Roadmap Strategy

Customer
Experience

Agent
Experience

Administrator
Experience

Developer
Experience

Conditional chat link
24D: Web Chat for Service 24.10.0

Capability Highlights

- **Conditional chat link:** When defined conditions are met show a chat link instead of the launch button in an Element Id on your web page. This is an extension of the Conditional Launch Button feature.

- **Consistent styling:**
  - You can apply classes and / or styles to the link with the Conditional Chat Link Css setting key.
  - The link text and aria label can be changed using custom text keys.

Key Benefits

- **Design user experiences:** You can have a chat button on a page or offer a conditional chat link embedded in another page where you feel visitors should read the text before seeing the chat link.

- **Business agility:** Easily meet personalized business requirements with Engagement Engine.

B2C Chat offer effectiveness
24D: Web Chat for Service 24.10.0

Capability Highlights

- **Write events to Visitor Events table:** Report on how many times the chat was accepted or declined. No EE settings are required for this feature.

- **Chat offer effectiveness:** WCFS now supports recording the Visitor Service offer and accept events for Proactive Chat and Conditional Chat Link with Engagement Engine.

- **B2C Visitor Service:** When invoking WCFS using Engagement Engine with Proactive Chat or Conditional Chat Link enabled, the Visitor Service events offer and accept are recorded in the *visitor_sessions* and *roi_conversion_offer_stats tables*.

Key Benefits

- **Improved reporting:** Analyze whether customers accept or decline the chat invitation.

- **Measure channel adoption:** Investigate how Web Chat is being used including features such as Proactive Chat Invitation or Conditional Chat Link.

Conditional launch button: Polling on multiple queues
24D: Web Chat for Service 24.10.0

Conditional Launch Button ⓘ   x

custom   ▼

‹ Conditional Launch Button Details

Category Id

☐ Enable Polling
Max Queue Size

Max Wait Seconds

Min Agent Sessions

Product Id

Queue Id

6,8

Capability Highlights

- **Support multiple queues for polling:** When defined conditions are met show the launch button or a chat link. This is an extension of the Conditional Launch Button feature.

- **Queue Id parameter:** Supports a comma separated string of queue IDs instead of just a single queue ID.

Key Benefits

- **Improved polling:** Show the launch button based on availability conditions across multiple queues.

- **Simplified administration:** You can now handle polling across queues from the same Web Chat component setup.

Pre-launch form: Field pattern validation
24D: Web Chat for Service 24.10.0

Capability Highlights

- **Field Pattern Validation on Pre-Launch Form:** Check that the correct field format or pattern is entered.

Key Benefits

- **Correct data entry:** Validate input before starting chat.
- **Data completeness:** Show dynamic fields when relevant for the agent or routing.
- **Faster issue resolution:** Agents get correct and complete information so they can more efficiently answer the customer's question.

Pre-launch form: Dynamic field visibility
24D: Web Chat for Service 24.10.0

Capability Highlights

- **Dynamic Field Visibility on Pre-Launch Form:** You can make the visibility of the fields dynamic by adding dependencies.

- You can either **hide or show a field** when another one matches a **value or a regular expression**. E.g.

  - Show a language field when the country is Other, and when the selected language is Spanish ask if it is Latin Spanish

  - A ZIP code field is shown when the tracking ID starts with either 123 or 321.

Key Benefits

- **Correct data entry:** Validate input before starting chat.

- **Data completeness**: Show dynamic fields when relevant for the agent or routing.

- **Faster issue resolution:** Agents get correct and complete information so they can more efficiently answer the customer's question.

Control attachments on the agent side
24D: Web Chat for Service 24.10.0

Capability Highlights

- **Enable Agent attachment:** You can now control if the agent can send files to WCFS.
- This is **enabled by default**, and you can disable the attribute.

Key Benefits

- **More control:** Define who can't send files based on your business requirements.

Sensitive information detection in subject
24D: Web Chat for Service 24.10.0 t

Capability Highlights

- **Sensitive information detection:** The subject connection data field is also checked for sensitive information. No setting needs to be done in EE.

- **Masking subject field:** WCFS is sending masked string on the chatAuthenticate API call.

- **Masking patterns for Subject:** Next to the built-in regular expressions like Credit Card Number or Social Security Number you can now define your own ones for masking, and they also work for the Subject

Key Benefits

- **End-user security compliance:** By not storing personal information to the transcript or incident.

- **Agent efficiency:** By giving agents visibility on data that is needed to resolve the ticket but not storing it as part of the transcript or completely hiding it from the agent's view.

Improved cross site scripting prevention and form security
24D: Web Chat for Service 24.10.0
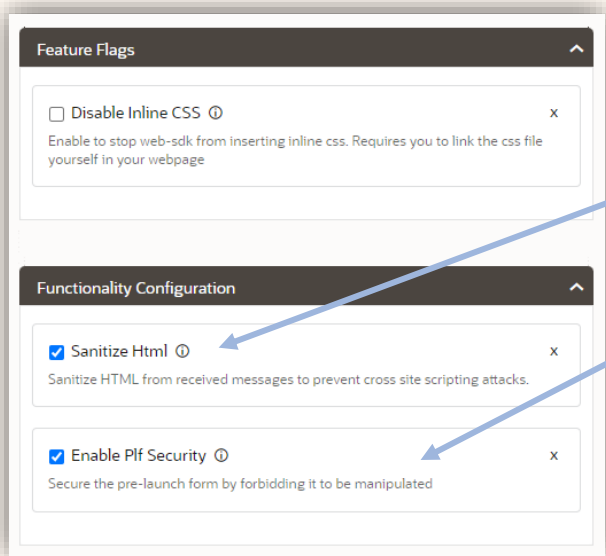
Capability Highlights

- **Content Security Policy (CSP):** CSP is an added layer of security that helps detecting and mitigating certain types of attacks, including Cross-Site Scripting (XSS) and data injection attacks. WCFS supports the use of CSP.

- **Cross-Site Scripting (XSS):** We have improved security by adding extra algorithms to prevent cross site scripting.

- **Sanitize Html setting:** Sometimes these algorithms can be too strict, you can use the setting Sanitize Html to turn it off.

- **Pre-launch form security:** Use the Enable Plf Security setting to turn off the restriction to manipulate the form

Key Benefits

- **Improved security:** This allows you to have a tighter content-security-policy.

- **Business agility:** Easily meet changing security requirements while enabling highly personalized user experiences with Engagement Engine.

Post conversation message link
24D: Web Chat for Service 24.10.0

Capability Highlights

- **Post conversation message link:** You can now customize the survey URL with parameters.

- **Add parameters:** You can customize the URL with substitution strings to add parameters that can be replaced by field values.

- **Supported keys:**

  - Connection Data standard fields

  - Connection Data custom fields

  - System keys: engagementId; timestamp

Key Benefits

- **Survey analytics:** Add additional attributes in the survey URL for reporting purposes.

- **3rd party survey tools:** Ability to send e.g. Interaction ID, Contact ID and Time stamp to e.g. Eloqua for reporting.

# Longer text field for icons
24D: Web Chat for Service 24.10.0

Capability Highlights

- **Removed field size limit** Text fields for defining the icons are no longer limited to 124 characters
- **Resizable text area:** The text area can be made bigger or is scrollable for very long strings.
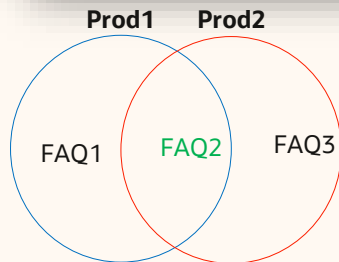
Key Benefits

- **Improved branding:** This allows you to add icons with very long SVG strings.
- **Business agility:** Easily meet changing business requirements while enabling highly personalized user experiences with Engagement Engine.
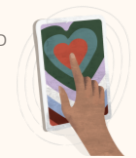
Multi-facet Supports OR in Customer Portal

24D: Knowledge Advance in Customer Portal

Prod1 **Prod2**

FAQ1 FAQ2 FAQ3

multiSelectionCondition=AND

- Returns FAQ2
- Default

multiSelectionCondition=OR

- Returns FAQ1, FAQ2, and FAQ3
- New

Capability Highlights

- The **multi-facet support** in knowledge that was limited to using AND, now supports **OR** as well.

Key Benefits

- **Increased success rate** for users when looking for answers since filtering can include all possible related products.

Content Grid for Customer Portal
24D: Knowledge Advance in Customer Portal

Capability Highlights

- Display image from **article in a grid** instead of a table of links when browsing specified content types

Key Benefits
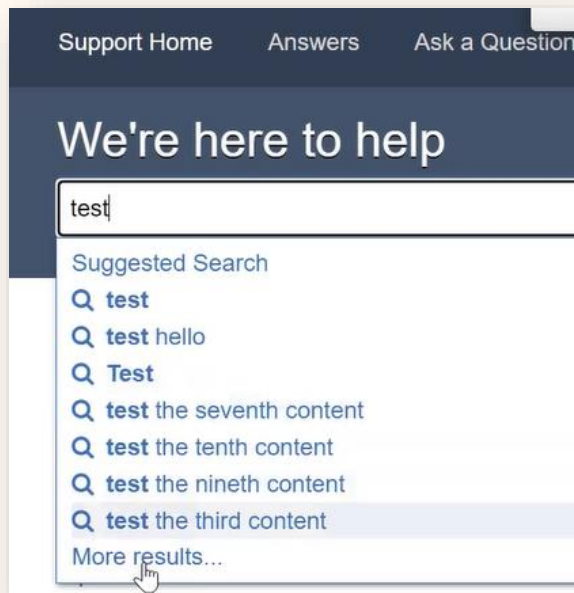
- More **visual experience** for small record-sets such as News or Alerts

Link to Search Results from Suggestions

24D: Knowledge Advance in Customer Portal

Capability Highlights

- When there are more suggestions than configured threshold a link to search results is returned at the bottom of the list of suggestions

Key Benefits

- Encourages users to **move beyond the auto-complete** and submit their search

Calendar View Date Picker Widget
24D: Customer Portal

Capability Highlights

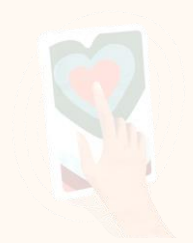- **Date Picker:** Calendar view widget using which end-users can pick a date and time as part of form filling

Key Benefits

- **Usability:** Enhances user experience of end users while inputting dates with intuitive UI
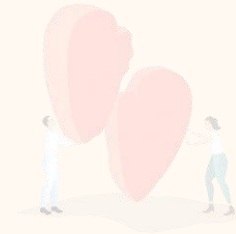
Roadmap Strategy

Customer
Experience

**Agent
Experience**

Administrator
Experience

Developer
Experience

Additional Reporting on Chat Agent Preferences

24D: Agent Chat

Max Chats for Profile	Max Active Chats	Last Modification
4	3	May 7, 2023 (11:00 AM)
4	4	June 1, 2023 (04:15 PM)
2	1	July 9, 2023 (09:54 AM)

Capability Highlights

- **Understand personal agent settings** for the max chats set on the profile & the last time the agent modified their personal max chat setting

Key Benefits

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

Option to Send a Zoom Link During a Live Chat
24D: Agent Chat
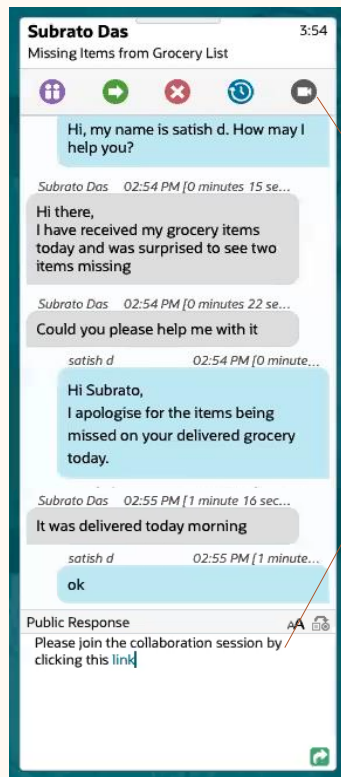
Send a Zoom meeting link during a live chat session

Capability Highlights

- **Agents can create Zoom meetings** from within the chat panel

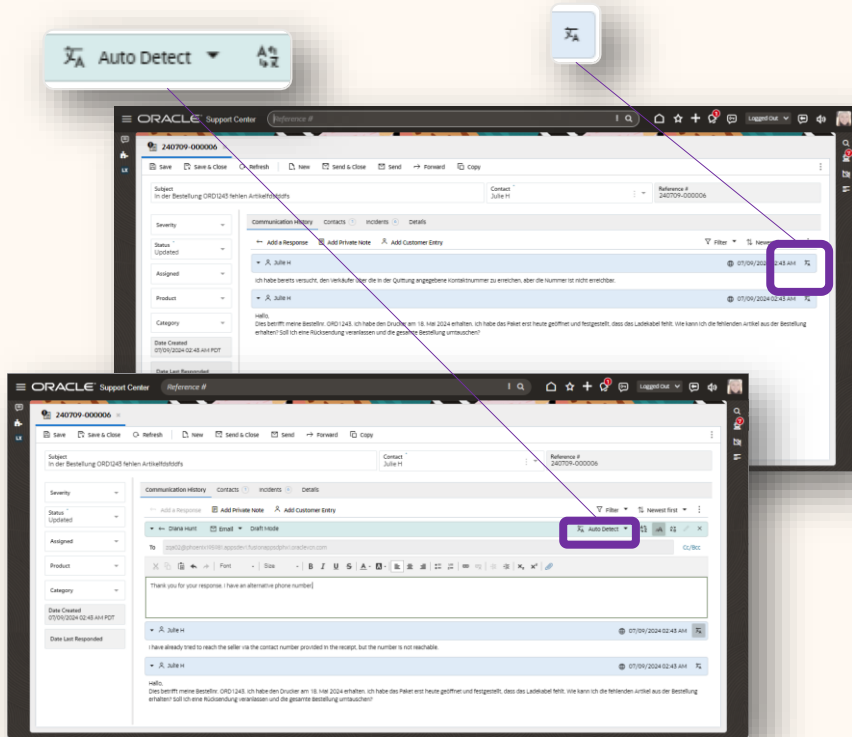- **Requires an integration with Zoom** is in place for the interface

Key Benefits

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

Incident Thread Translation

24D: Incidents and Agent Insights

Capability Highlights

- **Language Translation for OCI and Third-Party** will be available for Customer Entries, Response Threads, and Private Notes

- **Agents** receive messages in the customer's language and can translate to their preferred language

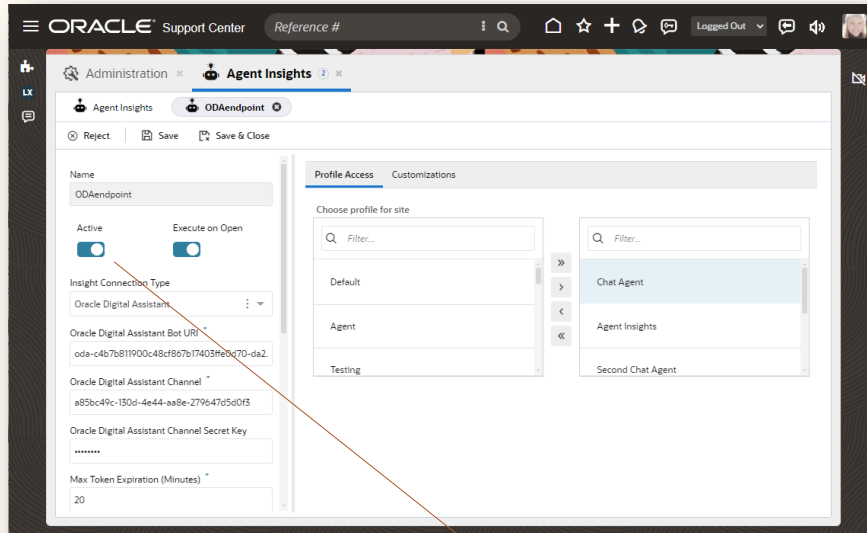- **Customers** receive messages in their preferred language

Key Benefits

- **Employee Optimization:** Enables agents to communicate effectively with a diverse and global customer base

All dates are subject to change based on Oracle's legal process

Execute Agent Insights by Default
24D: Incidents and Agent Insights

Options to Execute Endpoint on New or on Open when the Workspace renders

Capability Highlights

- **Set up Agent Insights** endpoint to execute by default

- **Workspace Rules Action** to include executing an Agent Insight Endpoint

Key Benefits

- **Increase Control** of when information is displayed to the Agent

Workspace Control Enhancements
24D: Incidents and Agent Insights

Capability Highlights

- **The maximize and minimize icon** for the thread control is now in the Thread Header and the icon is now in the Report Header in the reports control

- **Maximize and minimize** is now supported in the browser control in BUI

- **Text on Workspace Tab** label now supports text color

Key Benefits

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

Scheduling Reports as XLSX Excel Attachment
24D: Analytics

Capability Highlights

- **XLSX Format for Scheduling:** Schedule reports in XLSX Excel format attachment

Key Benefits

- **Supports Latest Excel Format:** Xlsx is less susceptible to corruption and is a lightweight format, which reduces the file attachment size of scheduled reports in Excel format

Column Header Auto Filter Criteria in BUI
24D: Analytics

Capability Highlights

- **Auto-Filter Criteria Section:** Users can now view/edit/delete the applied Auto-Filters through column headers

- **Un-select option:** users can unselect/select to remove/apply the filtering without deleting the criteria applied

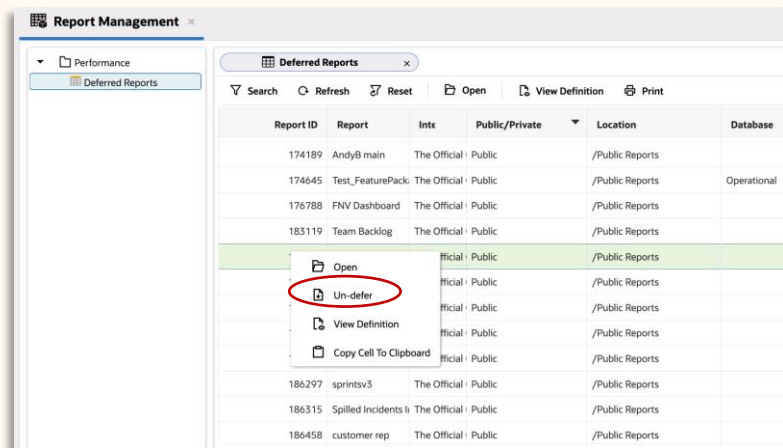- **Minimize option:** Users can minimize the section to improve real estate

Key Benefits

- **Ease of Use:** The auto-filter criteria section makes it easy to view, apply, and manage the column header auto-filters, especially when handling complex filtering use cases.

Move Reports out of Deferred Execution from BUI
24D: Analytics

Capability Highlights

- **Report Management:** View Deferred reports under Report Management tile in BUI

- **Un-defer:** Admins/Analytics Admin with report edit permission can use the un-defer option in BUI to remove report execution from BUI

Key Benefits

- **Usability:** Admins can un-defer report execution without login to the .NET console for business-critical reports
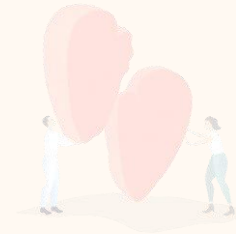
Roadmap Strategy

Customer
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Outbound SMS via Responsys
24D: Enhanced Business Rules

New action in Incident rule base to send SMS

Responsys tile

UI Configurator to provide credentials of Responsys

Capability Highlights

- **New Action:** A new action called 'Trigger SMS Message' is available to send SMS to contacts
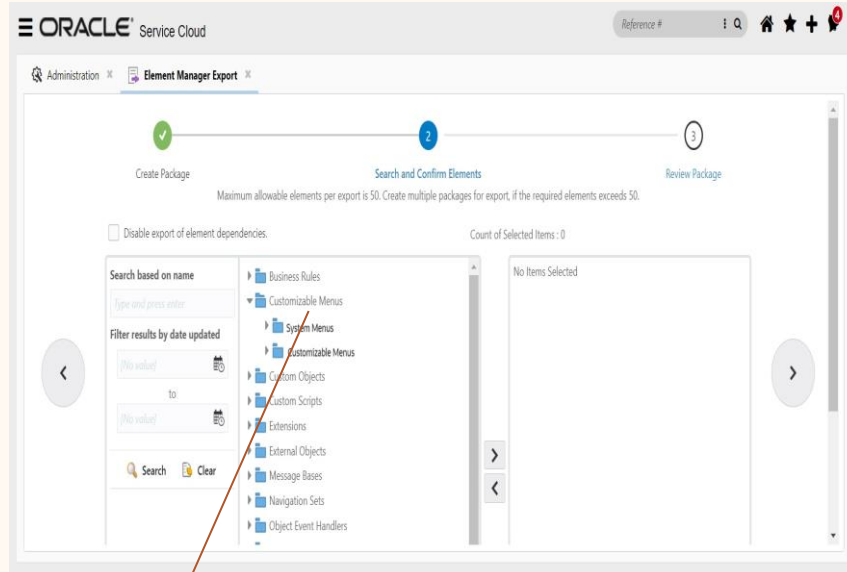- **UI for Configuration:** Provides a UI to configure the Responsys credentials

Key Benefits

- **SMS:** Send SMS to contacts when the conditions in EBR are met
- **Personalized messages:** Personalize the message using data from Service Cloud objects and variables

Customizable Menus support
24D: Element Manager

Customizable Menus in the Search page in Left panel

Capability Highlights

- **Export and Import:** Ability to export and import Customizable menus and System Menus between two OSvC instances

- **API Support:** Export and import Customizable Menus via Element Manager REST APIs
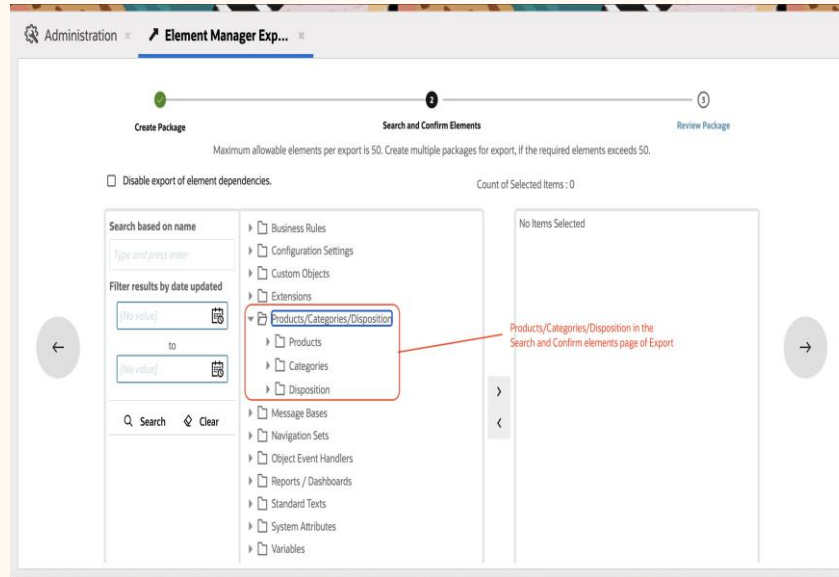
Key Benefits

- **Agent efficiency:** Admins can migrate Customizable Menus between instances efficiently

- **Dependency Management:** Admins can choose to include the dependent elements of Customizable Menus in the export

- **Automated deployments:** Automate the deployment cycle by setting up CI/CD pipelines

Product, Category and Disposition support
24D: Element Manager

Capability Highlights

- **Export and Import:** Ability to export and import Product, Categories, and Disposition between two OSvC instances

- **API Support:** Export and import Product, Categories, and Disposition via Element Manager REST APIs

Key Benefits

- **Agent efficiency:** Admins can migrate Product, Categories, and Disposition between instances efficiently

- **Dependency Management:** Admins can choose to include the Product-Categories and Product-Disposition link in the export

- **Automated deployments:** Automate the deployment cycle by setting up CI/CD pipelines

Customer Defined Retention Period for Transactions

24D: Data Lifecycle Management

Error message when the retention period is below minimum value

Ability to select duration for an Incident transaction policy

Capability Highlights

- **Retention period:** Ability for the admins to choose retention period according to their business need.

- **Minimum retention period:** The minimum retention period for each transaction will be enforced with a default value.

Key Benefits

- **Regulatory and compliance:** The admins can define policies with desired retention period to purge transactions to meet the regulatory and compliance requirements.

Job Scheduler
24D: Job Scheduler

Details of the jobs scheduled in the site.

Job Scheduler

A card in Admin page

Capability Highlights

- **Create Cron Jobs:** Ability to create a cron job using the Job Scheduler

- **Schedule Cron Jobs:** Ability to schedule a cron job using the Job Scheduler

- **Frequency:** Supported frequencies are hourly, daily, weekly, monthly, quarterly, yearly, and one time
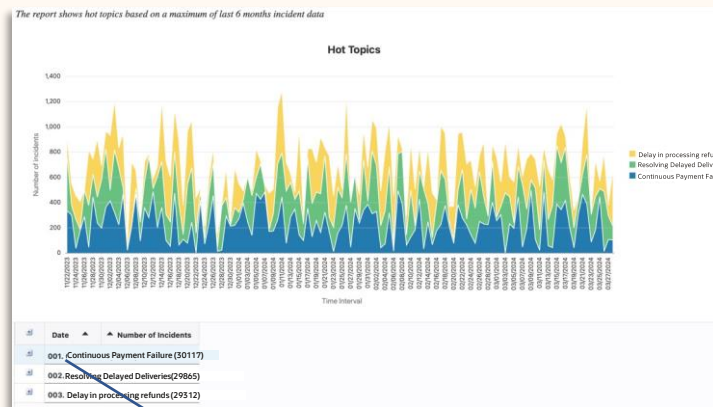
Key Benefits

- **Manage Cron Jobs:** Admins can now manage the cron jobs from the BUI and have full control on the cron jobs

- **Monitoring:** The execution details of the cron jobs will be displayed in a tabular format in the UI to monitor the jobs

Hot Topic Detection
24D: Embedded AI Services

Capability Highlights

- **Clustering**: Provides top clusters of incidents with similar contexts
- **Group Identification:** Helps to mark similar/duplicate incidents and name them with verb and noun
- **Trends:** Provides insights on the trend of Hot Topics identified

Key Benefits

- **Bottleneck Identification:** Helps in planning to either increase/decrease agents supporting a specific skill
- **Process evaluation:** Helps in understanding the impact of any process changes
- **Identify new emerging topics:** Helps in identifying formulation of a new cluster of incidents

Editor Anchor Support

24D: Knowledge Foundation Authoring

A dedicated button for inserting anchors

Pop-up for inserting Anchor name
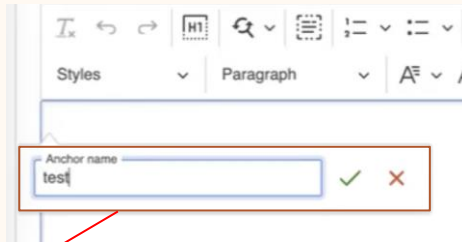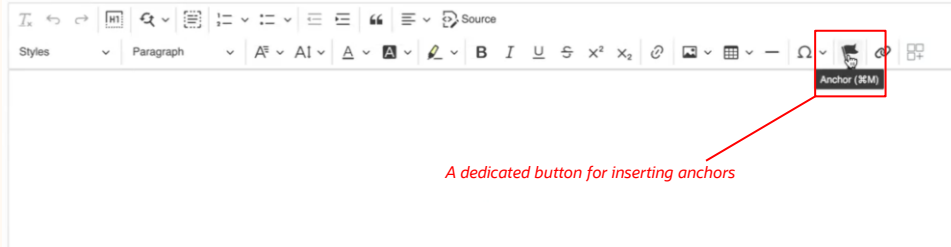
Capability Highlights

- Introduces a **dedicated button** on the toolbar to create anchors.

Key Benefits

- **Ease of use:** The authors can easily create anchors to be referred using answer links directly from design mode

Editor Color Coding Support
24D: Knowledge Foundation Authoring

Syntax and Active Line Highlighting

Line Numbers and Code Folding

Search and Replace

HTML Auto Complete

Capability Highlights

- Introduces support for the following functions in the source mode of new rich text editor:
  - **Syntax and Active Line Highlighting**
  - **Line Numbers and Code folding**
  - **Search and Replace**
  - **Auto Closing tags and HTML Auto Complete**
  - **Bracket Closing and Trailing Spaces**

Key Benefits

- **Author Ease of use:** The authors can easily edit, reference and modify content in source mode.

Require Remove after Date
24D: Knowledge Advance Authoring

Option to include end date for content type

Error message when Remove after Date is not entered for a content type where its mandatory

Capability Highlights

- **Remove after Date:** A new option field configurable as mandatory for content types.

Key Benefits

- **Fresh Content:** Maintains the knowledge content fresh by automatically expiring content after mentioned date.

Roadmap Strategy

Customer
Experience

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Experience**

Allowed API Methods

24D: External Objects and Integrations

Capability Highlights

- **Allowed API Methods:** Admins can choose the allowed API methods from the dropdown

Key Benefits

- **Control:** Admins will have more control over the connection and restrict undesired actions through the invocation.

Chat Service Support
24D: Service Health Metrics

Additional tracking for the Chat Service

Capability Highlights

- **Chat service data** is available via REST APIs

Key Benefits

- **Observability:** Provides data for the overall health of the CX service, where such data was not previously available
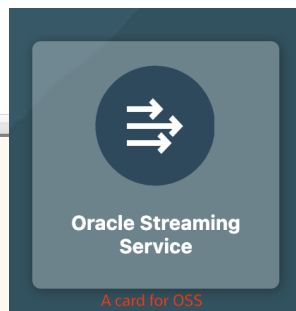
Admin UI for OSS Credentials
24D: Event Delivery Service

Capability Highlights

- **UI for configuration:** Provides a UI to configure the OSS credentials

Key Benefits

- **Ease of use:** The customers can manage their OSS instances and switch between OSS instances instead of raising SRs

Thank You!

We appreciate you being here!