

# 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

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

### Incidents and Agent Insights

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

### Analytics

- Scheduling reports as XLSX Excel attachment
- Column header Auto-filter criteria
- 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

- Hot Topics\*

### Knowledge Foundation

- ❖ Editor anchor support
- ❖ Editor color coding support

### Knowledge Advanced

- ✓ Require remove after date

## Developer



### Event Delivery Service

- Admin UI for OSS credentials

### External Objects & Integrations

- Allowed API Methods

### Service Health Metrics

- Chat Service Support

## Legend

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



# Roadmap Strategy



Customer Experience



Agent Experience



Administrator Experience



Developer Experience





# Roadmap Strategy



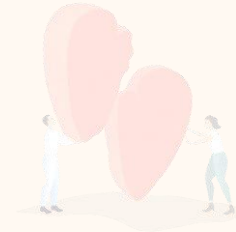
Customer Experience



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.

```
<div id="chatDiv">chatDiv</div>
```





# B2C Chat offer effectiveness

## 24D: Web Chat for Service 24.10.0

**Table Information - visitor\_pages**

**Table Label** Visitor Pages

**Table Description** URLs of pages visited

**Tbl** 667

**Visibility** Chat

**Primary Key** visitor\_page\_id

**Columns** Date Created (created)  
Title (title)  
URL (url)  
URL Title Hash (url\_title\_hash)  
Visitor Page ID (visitor\_page\_id)

**Indexes** visitor\_page\_id (Unique)  
url\_title\_hash  
created

**Live Chat**

An agent is available to chat.

Would you like to start a chat session?

No Yes

**Column** Proactive Chat Offer Effectiveness

Start Time	Visitors Offered Chat	Offer Acceptances	Invitations Accepted Rate
03/07/2024 02:00 AM	1	0	0.00 %
03/07/2024 04:00 AM	3	0	0.00 %
03/07/2024 06:00 AM	1	0	0.00 %
03/07/2024 07:00 AM	248	7	2.82 %
03/07/2024 08:00 AM	339	6	1.77 %
03/07/2024 09:00 AM	419	9	2.15 %
03/07/2024 10:00 AM	458	8	1.75 %
03/07/2024 11:00 AM	476	7	1.47 %
03/07/2024 12:00 PM	470	9	1.91 %
03/07/2024 01:00 PM	458	16	3.49 %
03/07/2024 02:00 PM	435	8	1.84 %
03/07/2024 03:00 PM	422	8	1.90 %
03/07/2024 04:00 PM	405	6	1.48 %
03/07/2024 05:00 PM	430	8	1.86 %
03/07/2024 06:00 PM	425	10	2.35 %
03/07/2024 07:00 PM	448	7	1.56 %
03/07/2024 08:00 PM	427	5	1.17 %
03/07/2024 09:00 PM	294	11	3.74 %
03/07/2024 10:00 PM	5	0	0.00 %
03/07/2024 11:00 PM	1	0	0.00 %
<b>Total</b>	<b>6165</b>	<b>125</b>	

## 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

## 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.

The screenshot shows a chat pre-launch form with the following fields:
 

- First Name \***: Contains "Namita1234 Goyal0987654321". A red error message box is overlaid on this field: "No numbers and max 15 characters".
- Email \***: Empty.
- Birth Date**: Contains "1111111111".

 Buttons for "Cancel" and "Start Chat" are at the bottom.

The configuration panel shows settings for a custom field:
 

- Custom Field Type**: <select>
- Dependency**: >
- Name \***: firstName
- Options**: > x
- Pattern**: [a-zA-Z]{1,15} (highlighted with a blue box)
- Relaunch Value \***: default
- Required

The screenshot shows a chat pre-launch form with the following fields:
 

- First Name \***: Contains "test".
- Last Name \***: Contains "test".
- Email \***: Contains "a@a.com".
- Birth Date**: Contains "1111111111". A red error message box is overlaid on this field: "Date format: YYYY-MM-DD".

 Buttons for "Cancel" and "Start Chat" are at the bottom.

The configuration panel shows settings for a custom field:
 

- Custom Field Type**: text
- Dependency**: >
- Name \***: birthDate
- Options**: >
- Pattern**: [0-9]{4}-[01]{1-2}-[01]{1-2} (highlighted with a blue box)
- Relaunch Value \***: default
- Required







# 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

The image displays the Oracle Service Cloud interface. On the left, the 'Functionality Configuration' window is open to 'Attachment Settings'. The settings include:

- Max File Size Mb: 120
- Standard Download:
- Supported File Types: png jpg txt gif pdf docx bmp doc csv xlsx xls jpe
- Enable Agent Attachment:
- Attachment Mode: agent

On the right, two chat windows are shown. The top chat window shows a conversation where a user named 'aa aa' sends a message, and the agent 'Namita 1 Goyal1' responds with 'Hi, my name is Namita 1 Goyal 1. How may I help you?'. The agent then shares a file '1.5MB.pdf (2MB)'. The bottom chat window shows a similar conversation where the agent shares a file '1.5MB.pdf (1625 KB)'.

### 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

The screenshot displays the Oracle Service Cloud interface. On the left, a 'Chats' sidebar shows a chat with 'aa aa' and a masked subject field '\*\*\*\*\*7415'. The main chat window shows a conversation with 'aa aa:219' (ID: 241007). The chat history includes a message from 'Namita1 Goyal1' at 07:00 PM asking for help, and a response from 'aaa'. The 'Current Chat' section shows the same message and response. Below the chat, there is a 'Public Response' section. On the right, a 'Chat' window shows a form with fields for 'First Name' (aa), 'Last Name' (aa), and 'Email' (aa@a.com). The 'Question' field contains the masked subject '\*\*\*\*\*7415'. Below the form, there is a table with columns 'Pr', 'Stat', and 'ie Interval', and a row with 'Unresolved' and 'Oh On'. At the bottom, there is a 'Type a message' input field.

## 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

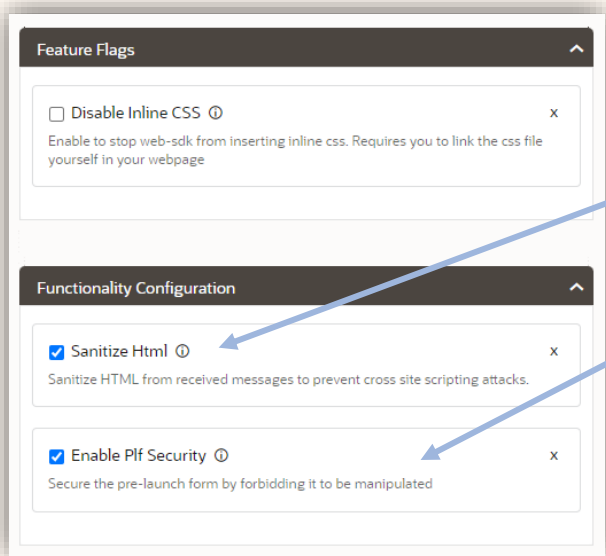
- **End-user security compliance:** By not storing personal information to the transcript or incident.
- **Agent efficiency:** By giving agents visibility on data that is needed to resolve the ticket but not storing it as part of the transcript or completely hiding it from the agent's view.





# 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

Settings Help Logout

Advisor Web Chat

Post Conversation Message Options > Url Parameters

Add Url Parameter

Url Parameter x

Field Name \*

engagementId

Substitution String \*

{ENGAGEMENT\_ID}

Close Save Save a

## 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

The screenshot shows the 'Settings > Web Chat > Edit Component' interface. The 'Web Chat' tab is selected, and the 'Functionality Configuration' window is open to the 'Icons' section. Three text areas are visible, each containing an SVG string for an avatar icon.

**Avatar Agent**

```
<svg xmlns="http://www.w3.org/2000/svg" version="1.0"
width="32.000000pt" height="32.000000pt" viewBox="0 0
32.000000 32.000000" preserveAspectRatio="xMidYMid meet"><g
transform="translate(0.000000,0.000000)"><rect width="32.000000"
height="32.000000" fill="#000000" stroke="none"><path
d="M0 160 10 -160 160 0 160 0 160 -160 0 -160 0 -160z
m209 86 c67 -35 65 -143 -4 -174 -51 -23 -107 -7 -131 39 -47 91 44 182
135 135z"/><path d="M110 220 c-25 -25 -35 -63 -22 -86 14 -26 130 -27
144 -1 22 43 -21 107 -72 107 -17 0 -39 -9 -50 -20z m86 -11 c17 -19 17
-23 -9 36 -21z"/><path d="M129 203 c-13 -15 -12 -15 9 -2 19 12 25 12 45
0 20 -13 21 -13 8 2 -7 10 -21 17 -31 17 -10 0 -24 -7 -31 -17z"/><path
d="M145 180 c-7 -12 2 -30 16 -30 6 0 7 5 4 10 -3 6 -1 10 5 10 6 0 8 5 5
10 -3 6 -10 10 -15 10 -5 0 -12 -4 -15 -10z"/><path d="M135 90 c3 -5 15
```

**Avatar Bot**

```
<svg xmlns="http://www.w3.org/2000/svg" viewBox="0 0 36 36"
fill="none"><path d="M0 0h36v36H0v0z" fill="#C74634"/><path
fill-rule="evenodd" clip-rule="evenodd" d="M7.875 8.625a2.25 2.25 0
00-2.25 2.25v16c0 .621504 1.125 1.125 1.125h2.25c0 2.25 0
.585-119.796-3312.761-12.76a2.25 2.25 0 011.59-.66h15.944a2.25 2.25 0
002.25-2.25v10.875a2.25 2.25 0 00-2.25H8.875a2.25 2.25 0 11-4.5 0
2.25 0 100-4.5 2.25 0 000 4.5zm-4.5-2.25a2.25 2.25 0 11-4.5 0
2.25 2.25 0 014.5 0zm-9 2.25a2.25 2.25 0 100-4.5 2.25 2.25 0 000
4.5z" fill="#FF7"/></svg>
```

**Avatar User**

```
<svg xmlns="http://www.w3.org/2000/svg" height="20" width="20"
viewBox="0 0 24 24"><path fill="black" d="M12 2c5 5 25 10 4 7 10
10a9 9 9 9 2 0 1-3.804 7.851 18 20a9 9 9 9 2 0 1-6 2c6 4 7 2 2
17.523 2.175 6 4 7 2 2m2 16h-4a2 2 0 0 0-1.766 1.06c1.123 6 2 4.05 94
```

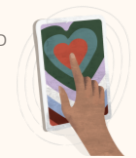
### Capability Highlights

- **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

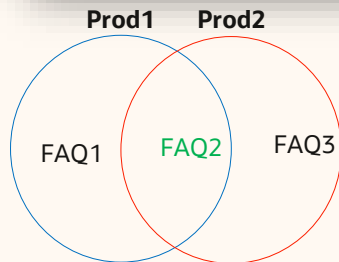
- **Improved branding:** This allows you to add icons with very long SVG strings.
- **Business agility:** Easily meet changing business requirements while enabling highly personalized user experiences with Engagement Engine.





# Multi-facet Supports OR in Customer Portal

## 24D: Knowledge Advance in Customer Portal



### 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

Filter by product

- Health
- Home
- Pet

Filter by category

- Billing
- Claims

<p>How can Insurance Repository provide fre...</p>	<p>Multiple e Insurance Accounts</p>	<p>Can policy holder have chosen both...</p>
<p>Paper electronic policies</p>	<p>HST rebates calculated</p>	<p>Accounts Payable transactions</p>

Next >

### Capability Highlights

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

### Key Benefits

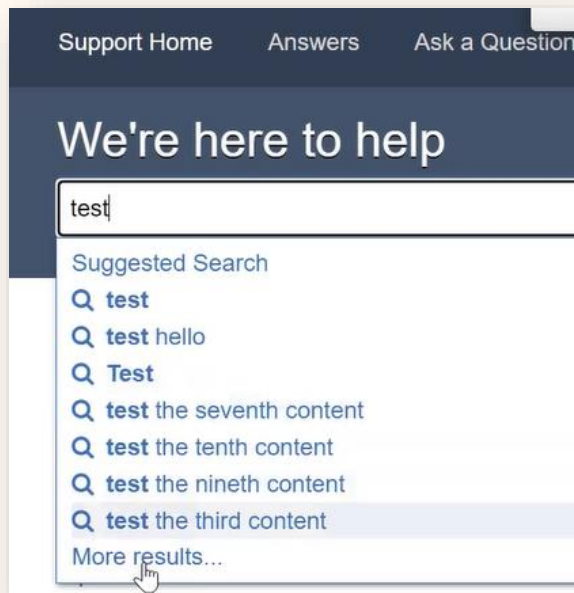
- More **visual experience** for small record-sets such as News or Alerts





# 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

Test Calender Date (Month-Day-Year) \*

25 July 2024 00:00

July 2024

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

04 : 04

Attach Documents

Choose file No file chosen

Test Calender with TIME & DATE

18 July 2024 03:00

### Capability Highlights

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

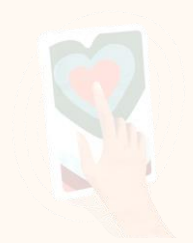
### Key Benefits

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





# Roadmap Strategy



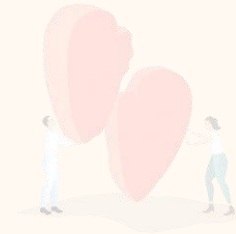
Customer Experience



Agent Experience



Administrator Experience



Developer Experience



# Additional Reporting on Chat Agent Preferences

## 24D: Agent Chat

Pushed in Bi-weekly Builds



### 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

Chat Agent Personal Profile Settings			
Staff Accounts <input type="text"/> Search			
Staff Account Name	Staff Account Display Name	Maximum Active Chats	Stagger Incoming Chats Time(seconds)
Bruce Parker	Bruce Parker	1	10
Luke Edwards	LukeEdwards	2	5
David Navara	David	2	10
Ryan Reed	Ryan Reed	2	20
Charles Robson			
Simon Hayes			

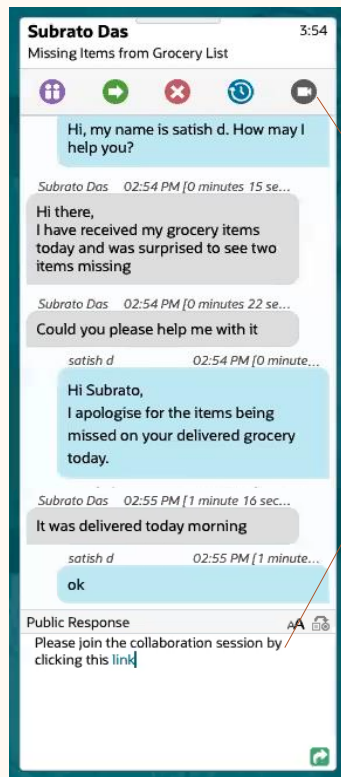
Max Chats for Profile	Max Active Chats	Last Modification
4	3	May 7, 2023 (11:00 AM)
4	4	June 1, 2023 (04:15 PM)
2	1	July 9, 2023 (09:54 AM)





# 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

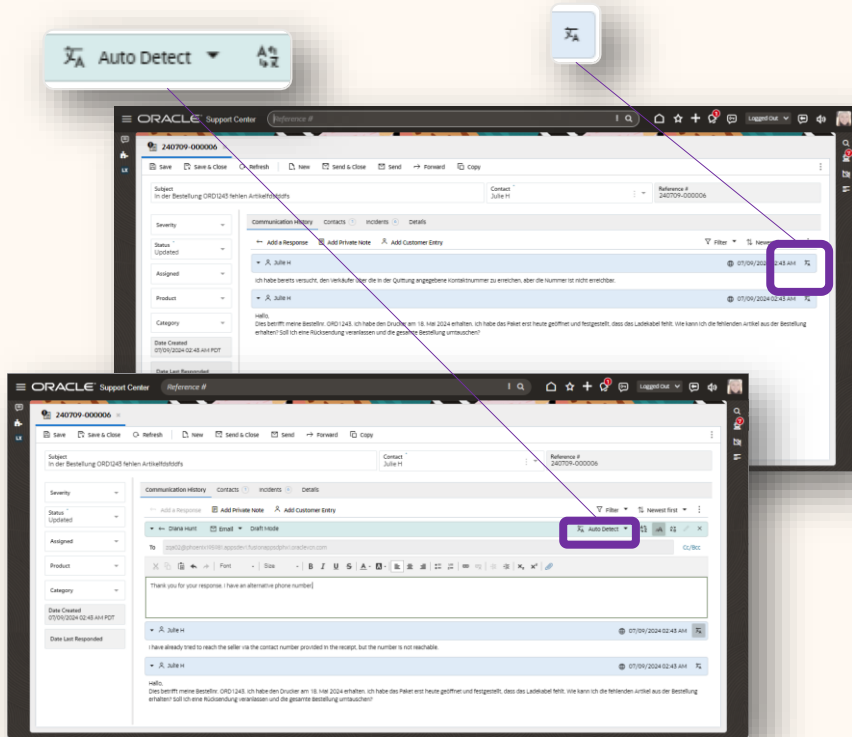
### Key Benefits

- **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

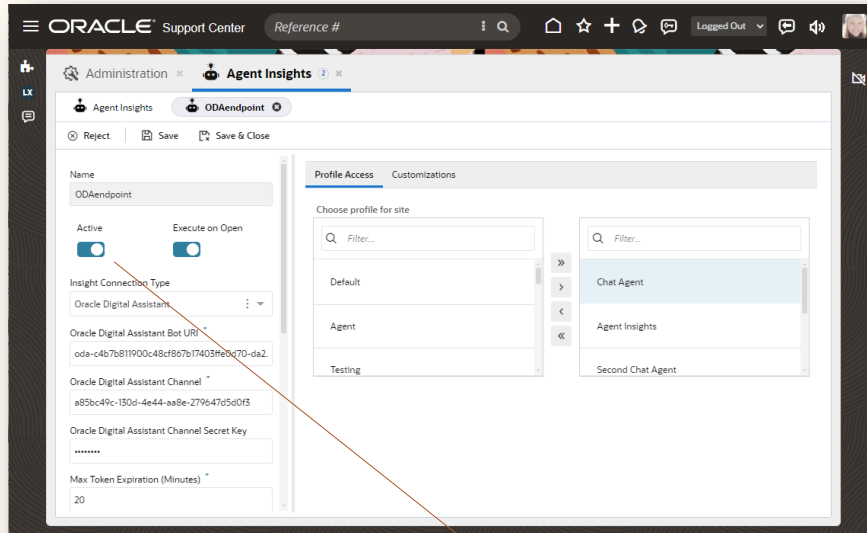
- **Employee Optimization:** Enables agents to communicate effectively with a diverse and global customer base





# 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

Messages Details Guides

+ Add New Filter Newest first

April Rein 09/14/2021 09:25 AM

hki

April Rein 09/08/2021 11:17 AM

April: Hi, my name is April. How may I help you?  
 April: You shared the following file successfully TestFileSend.pdf (25.27KB)  
 System: The end user Katara Eng has disconnected from chat 174

Tasks

File Attachments

Audit Log

Wh	Wh	Wh	Description	Client IP Address
09/14/20	April Rein	Edited	From Web Console Incident Editor	10.130.0.219
09/08/20	April Rein	Assigned	To Premium / April Rein	10.130.0.219

Browser Control

Partners Developers Company

View Accounts Contact Sales

Oracle Playbook

Messages Contacts Details Time Billed Tasks Organization Web Visit Attachments Audit Log

Contacts Contact Fields Incident History

Open Add New Delete Print Copy Assign Propose

### 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

Format	Excel (.xlsx)
Destination folder	HTML Attachment (Images/Charts stored on the server) HTML Email (Images/Charts stored on server) HTML Email (Images/Charts sent in email)
Run report as	Excel (.xls)
Recurrence	Excel (.xlsx)
Filter values	Comma Delimited Attachment (Images/Charts unavailable) XML Attachment (Images/Charts unavailable) Image Attachment PDF Attachment Published Compressed CSV File Send Report to Report Queue for Delivery as a CSV File

Alerts

To ->

### 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

Reference #	Subject	Status	Full Name	Que	Date La
241001-000003	Donde esta mi articulo?	Unre	ssar	Tier 1	10/01/20.
241001-000002	Donde esta mi articulo?	Unresolved	Nithin Nassar	Tier 1	10/01/20.
241001-000001	Help with membership	Unresolved	Nithin Nassar	Tier 1	10/01/20.
241001-000000	Help with membership	Unresolved	Nithin Nassar	Tier 1	10/01/20.
240828-000025	Offers for gift	Solved	Nithin Nassar		08/28/20.
240828-000024	Demo 1	Solved	Nithin Nassar		08/28/20.
240828-000001	CX100 product purchas	Solved	Nithin Nassar		08/28/20.
240713-000003	Issue with temperature	Unresolved	Nithin Nassar	Tier 1	07/13/20.
240424-000002	smartsense test	Updated	Nithin Nassar		04/24/20.
240424-000000	Smart sense test	Unresolved	Nithin Nassar	Tier 1	04/24/20.
230919-000000	Marketing Campaign	Unresolved	Nithin Nassar	Tier 1	09/19/20.
230830-000005	Repair Coffee Machine	Unresolved	Nithin Nassar	Tier 1	08/30/20.
230825-000002	Shop Machine Repair	Unresolved	Nithin Nassar	Tier 1	08/25/20.

### 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

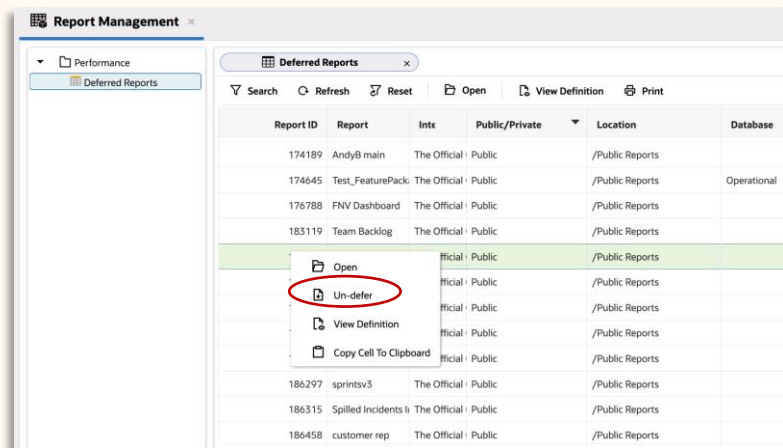
### Key Benefits

- **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



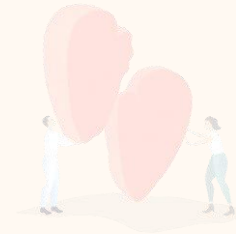
Customer Experience



Agent Experience



Administrator Experience



Developer Experience





# Outbound SMS via Responsys

## 24D: Enhanced Business Rules

**New action in Incident rule base to send SMS**

**Responsys Configuration**

Responsys API Endpoint URL \*  
 https://<responsys-instance>-api.responsys.pcs.oraclecloud.com

Username \*  
 Responsys Username

Password \*  
 Responsys Password

Activate

**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

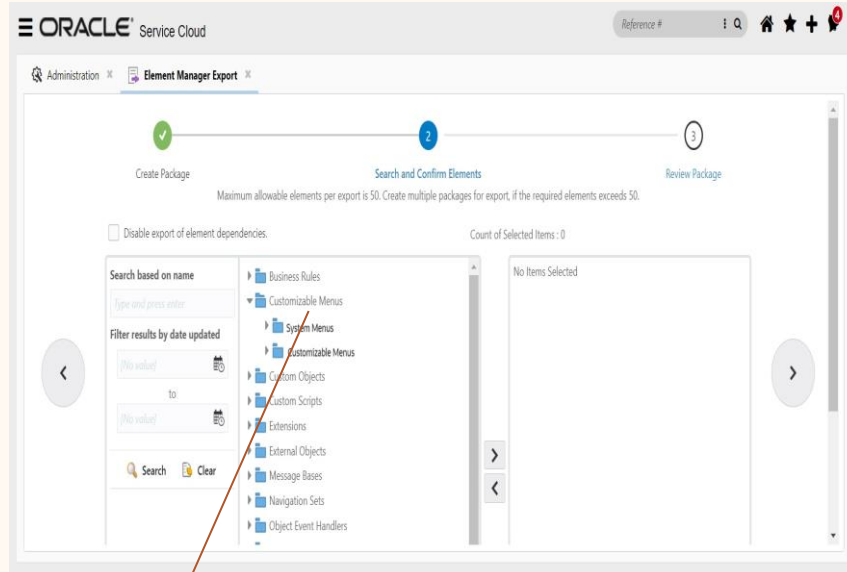
### Key Benefits

- **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

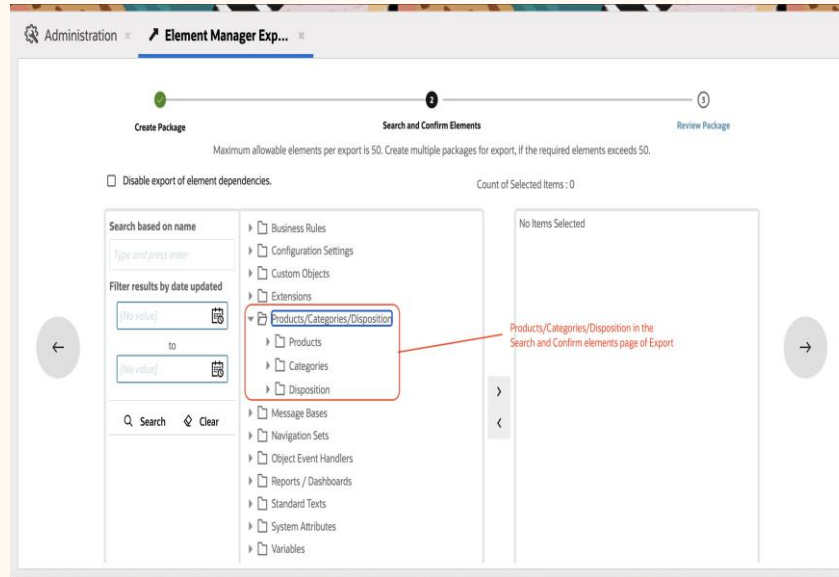
- **Agent efficiency:** Admins can migrate Customizable Menus between instances efficiently
- **Dependency Management:** Admins can choose to include the dependent elements of Customizable Menus in the export
- **Automated deployments:** Automate the deployment cycle by setting up CI/CD pipelines





# 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

ORACLE Service Cloud

Reference #

Job Scheduler

Job Scheduler New Job

Bookmark

Job Details Job Execution Details

Refresh Schedule New Job Run Now

Job Name	Job Description	Frequency	Status	Last Executed Time	Last Executed Status
Job1	Test Description for Job1	Every 2 Hour(s) and 30 Minute(s)	Enabled		Success
Job2	Test Description for Job2	Every Last Friday of every month	Disabled		Error
Job3	Test Description for Job3	Every 1st and 31st date of January and June of every year	Enabled		Terminated

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

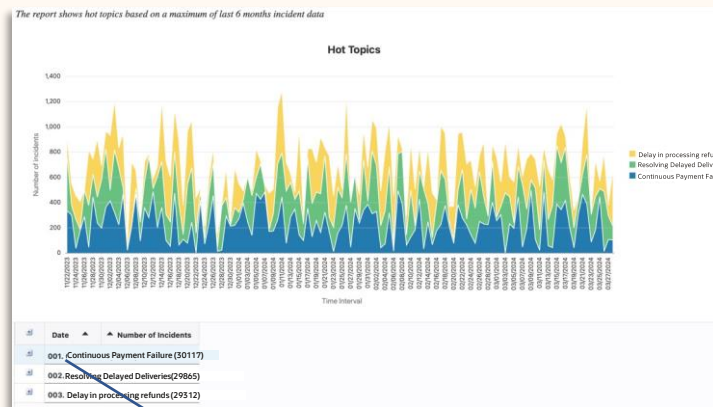
### Key Benefits

- **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



Date	Number of Incidents
<b>001. Credit Card (30177)</b>	
11/22/2023	334
11/23/2023	300
11/24/2023	38

### 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

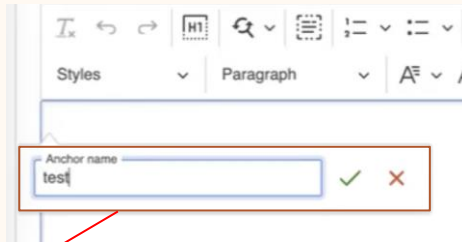
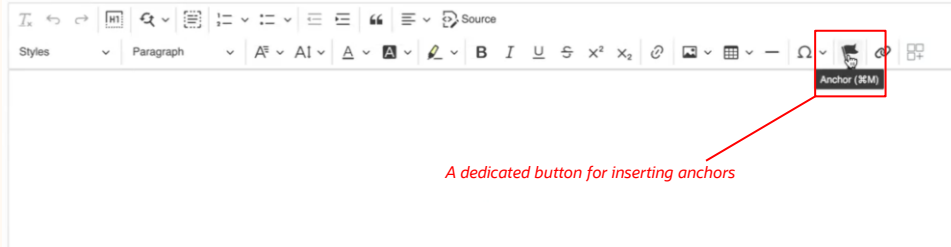
### Key Benefits

- **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



### 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

```

1 <table></table>
85 <p>
86 <span style="color:#000000;">!@#%*^&amp;#p; is sometimes yelled during a epic winter driving experience.</span>
87 </p>
88 <p>
89 &nbsp;
90 </p>
91 <p>
92 &nbsp;
93 </p>
  
```

Search and Replace

Search: nbsp| (Use /re/ syntax for regexp)

```

2 <span style="color:#000000;">!@#%*^&amp;#p;
3 </p>
4 <p>
5 &nbsp;
6 </p>
7 <p>
  
```

HTML Auto Complete

```

3 <tr>
4
5 <a
6 <abbr
7 <address
8 <applet
9 <area
10 <aside
11 <audio
12 <base
13 <basefont
14 <bdi
15 <bdo
16 <big
17 <blockquote
  
```

### 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

Default Lifespan (days)

Review Date (days)

Document ID Prefix\*  
 FA

Document ID Current Value  
 46

Warning: Resetting the current document ID value may result in multiple documents with the same Document ID.

Remove minor versions after publishing  
 Provide event start and end date attributes  
 Enable Priority/Order  
 Enable related content  
 Enable Check Out/In  
 Enable user activity logging  
 Enable Content Recommendations  
 Enable HTML Validation  
 Requires Remove After Date

**Oracle Knowledge Search Indexing Options**

Select document status for indexing by Oracle Knowledge Search

*Option to include end date for content type*

Remove styles definitions

**Repository View Selection \***

ortl\_25a\_test

**Publishing Options**

Please set a Remove After Date.

**Display On**

Remove After \*

Date  Time  AM   
 10/23/2024 07:17 AM

Review Date  
 Date  Time  AM

Display Position

*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



Agent Experience



Administrator Experience



Developer Experience





# Allowed API Methods

## 24D: External Objects and Integrations

The screenshot shows the configuration interface for an external object or integration. The 'Allowed API Methods' dropdown menu is open, showing a search field and a list of methods: GET, PATCH, PUT, POST, and DELETE. The 'PATCH' method is selected, indicated by a red dot. Below the dropdown, the 'Allowed API Method' list is shown with buttons for 'PATCH', 'PUT', 'POST', and 'DELETE', each with a close icon (X). A red oval highlights the 'Allowed API Methods' dropdown, and another red oval highlights the 'Allowed API Method' list. A red arrow points from the 'Allowed API Methods' dropdown to the 'Allowed API Method' list.

### 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



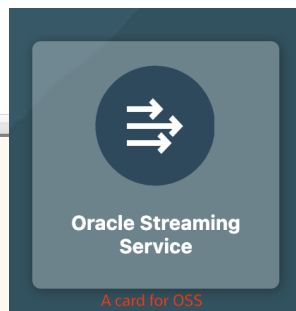


# Admin UI for OSS Credentials

## 24D: Event Delivery Service

The screenshot shows the Oracle Admin UI for configuring OSS credentials. The interface includes the following fields and controls:

- OSS Stream Name \***: A text input field with a red arrow pointing to it from the text "Tabs for OSS credentials".
- OSS Stream OCID \***: A text input field with a red arrow pointing to it from the text "A button to activate connection".
- OSS Tenancy OCID \***: A text input field.
- Tenancy Region \***: A dropdown menu.
- Required Objects \***: A dropdown menu.
- OSS Stream Pool ID \***: A text input field.
- Stream Pool ID of OSS**: A text input field.
- Activate**: A blue button at the bottom of the form.



### 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!