

ORACLE

Live agent transfer

Program Agenda

- 1 Live agent transfer
- 2 Steps to build a live agent transfer B2C
- 3 Other Oracle B2C features
- 4 Examples
- 5 B2C Incident Creation

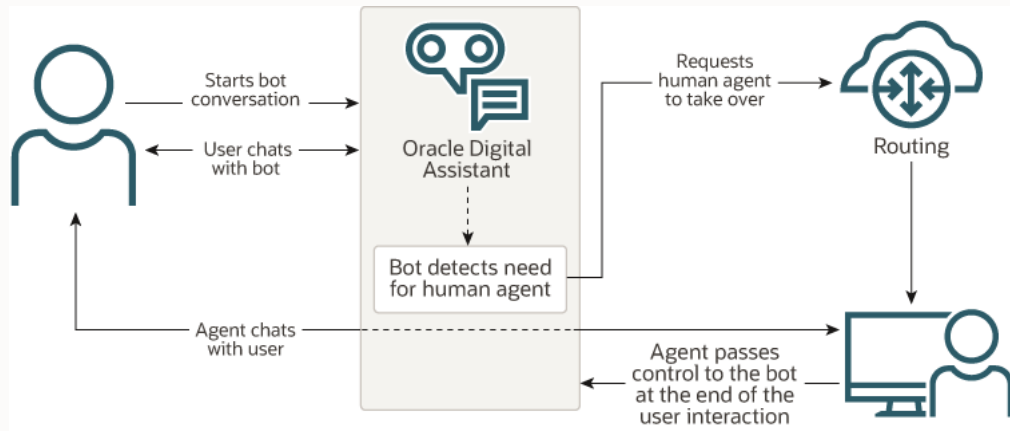
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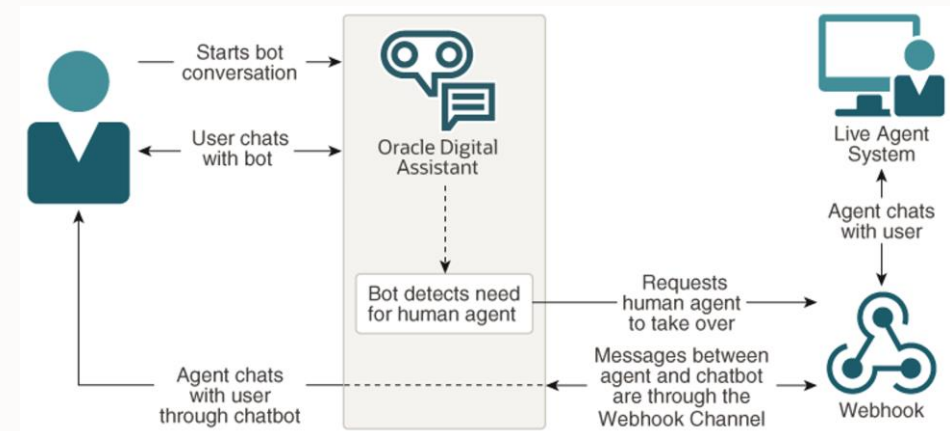
Live agent transfer

Integrate a skill or DA with a live agent system in two ways

You can integrate with version 18C (and later) of **Oracle B2C**



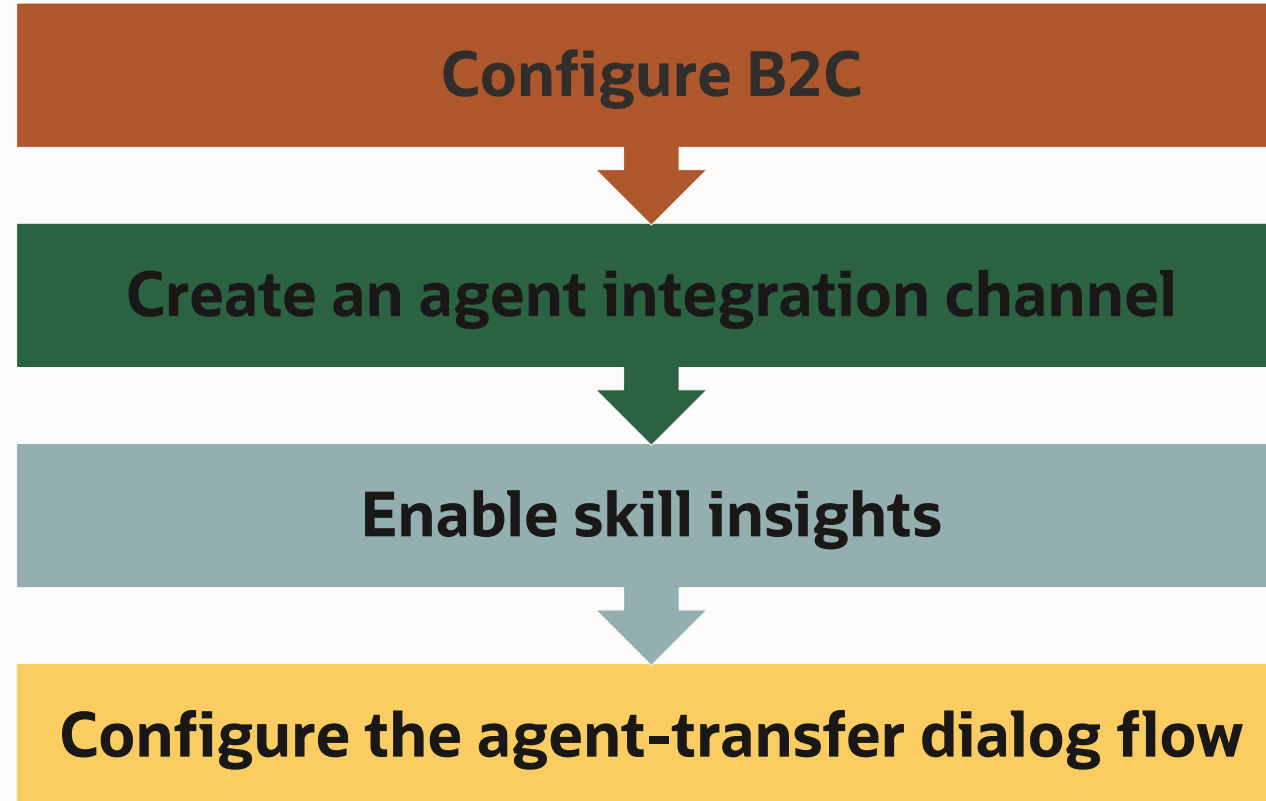
You can integrate with a webhook channel for **3rd Party** platforms



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Steps to build a live agent transfer B2C



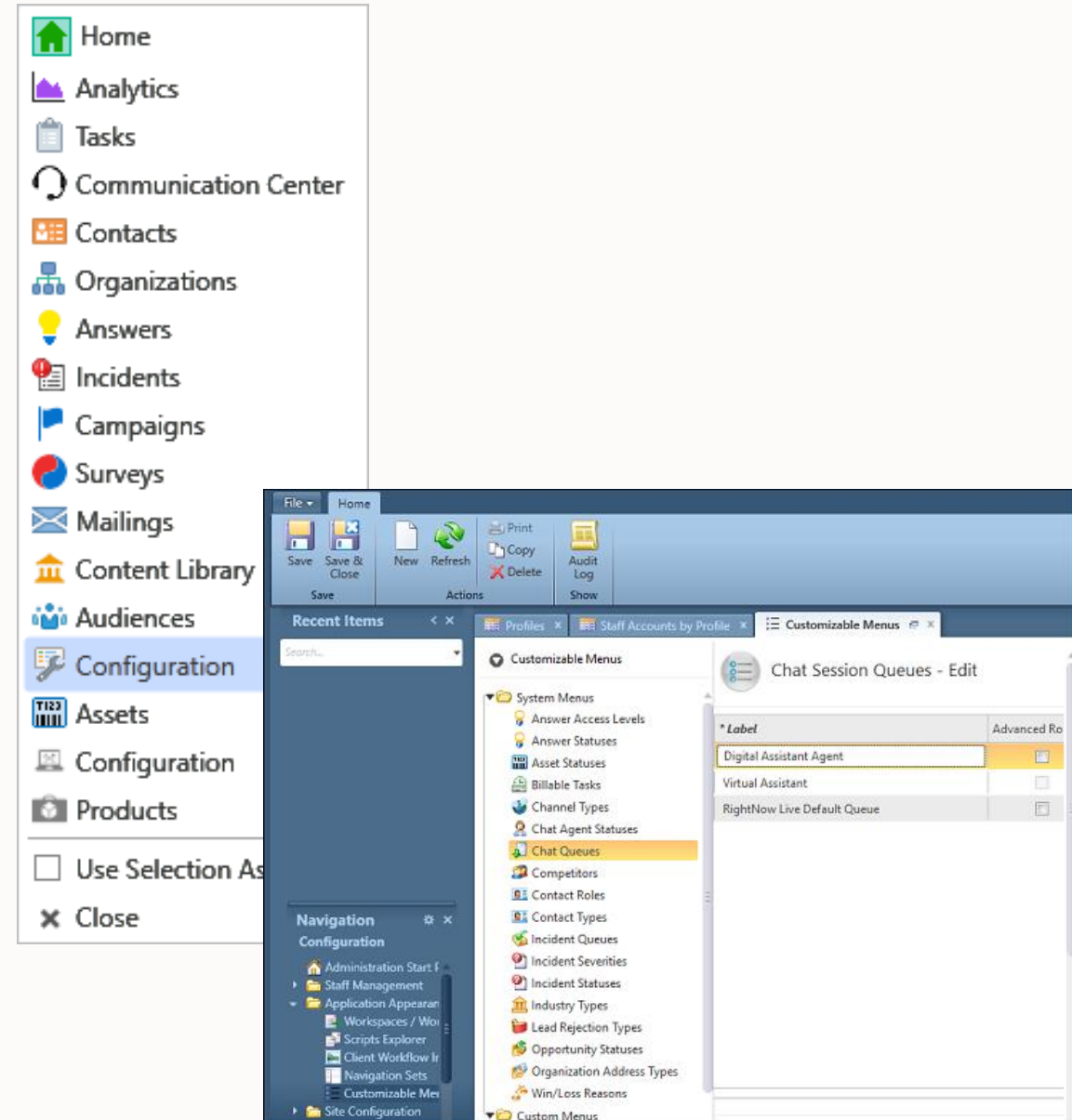
Configure B2C

Before you start you should have credentials provided by the Oracle B2C administrator

Those credentials should have permissions for:

- Access to the desired Oracle B2C Service interface
- Account Authentication and Session Authentication for Public SOAP API
- Account Authentication for Agent Browser User Interface

You also need to confirm that your Oracle B2C Service Account Manager has enabled the Chat Custom Interface API and the Chat Third-Party Queue Integration API



Create an agent integration channel

On the ODA side we create and configure an agent integration channel to access Oracle B2C

Agent integration is one of the many types of available channels under **Development > Channels**

The B2C URL is composed by hostname and domain name

The screenshot displays the Oracle Agent Integrations configuration interface. At the top, there are tabs for 'Users', 'Agent Integrations', and 'DA as Agent'. The 'Agent Integrations' tab is active, showing a list of integrations with a 'B2C' entry highlighted. A red arrow points from the '+ Add Agent Integration' button to the 'Create Agent Integration' form below. The form contains the following fields:

- Name: Integration name
- Description: Optional short description for this integration
- Integration Type: Service Cloud
- Domain Name: Domain name for the selected integration type (Required)
- Hostname Prefix: Hostname prefix for the selected integration type (Required)
- User Name: someone@company.com (Required)
- Password: Password for the user (Required)
- Session Expiration (minutes): 15 (Required)

A second red arrow points from the 'Password' field to a separate 'B2C' configuration panel on the right. This panel shows the following configuration for the B2C integration:

- Interaction Enabled:
- Name: B2C
- Description: Optional short description for this integration
- Integration Type: Service Cloud
- Domain Name: rightnowdemo.com
- Hostname Prefix: rnowgse11331
- User Name: Admin1
- Password: [Redacted]

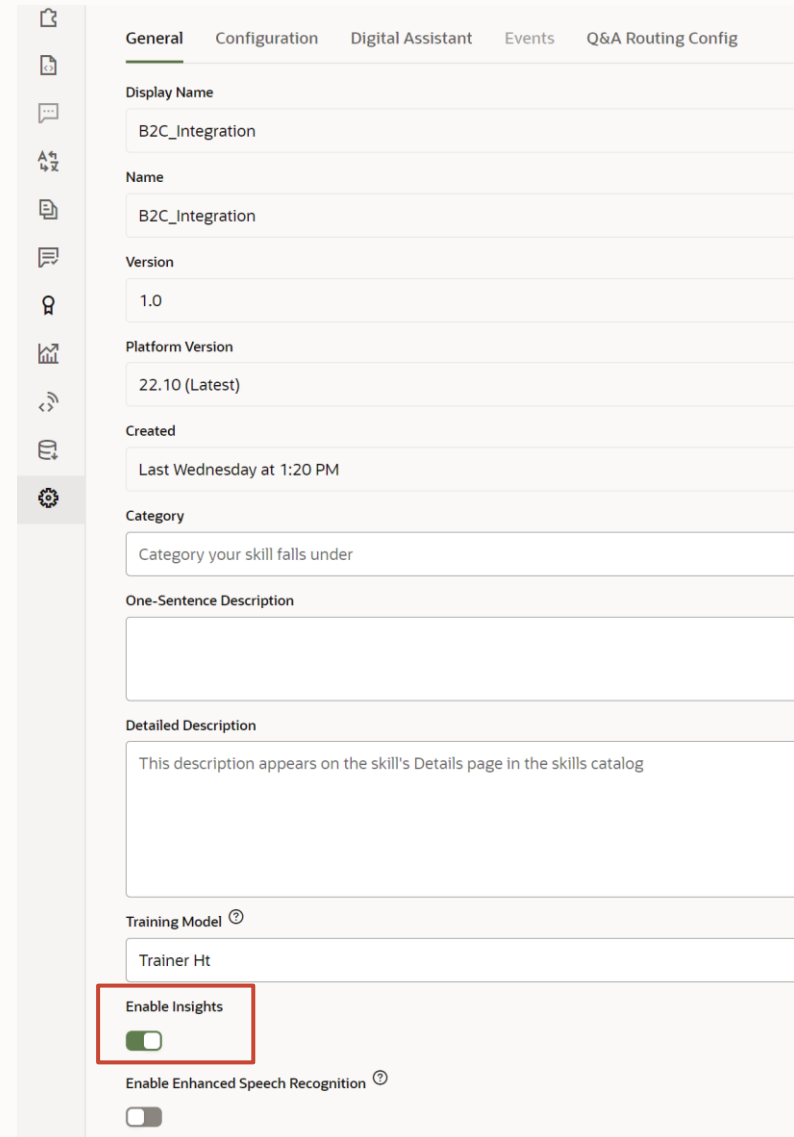


Enable skill insights

Enable insights for your skill

In the skill's settings page, switch the **Enable Insights** option to **On** to enable the framework to pass the conversation history to the live agent

This switch allows the handover of conversation history to Oracle B2C chat



The screenshot shows the 'General' tab of a skill's settings page. The page has a sidebar with various icons, and the main content area contains several fields and toggles. The 'Enable Insights' toggle is highlighted with a red box and is currently turned on. Below it, the 'Enable Enhanced Speech Recognition' toggle is turned off.

General	Configuration	Digital Assistant	Events	Q&A Routing Config
Display Name				
B2C_Integration				
Name				
B2C_Integration				
Version				
1.0				
Platform Version				
22.10 (Latest)				
Created				
Last Wednesday at 1:20 PM				
Category				
Category your skill falls under				
One-Sentence Description				
Detailed Description				
This description appears on the skill's Details page in the skills catalog				
Training Model ⓘ				
Trainer Ht				
Enable Insights				
<input checked="" type="checkbox"/>				
Enable Enhanced Speech Recognition ⓘ				
<input type="checkbox"/>				

Configure the agent-transfer dialog flow

In the visual flow designer, the state template **Agent Communication** has two states which will implement the handover to the live agent.

The state **Agent Initiation** initiates contact and establishes connectivity

The state **Agent Conversation** requests and manages the conversation

Add State

Preceding State: agentInitiation1 Agent Initiation

Transition: Next

Search: []

Service Integration

- Custom Component: Invoke a custom component service
- Agent Communication**: Transfer from skill to a human agent
- Agent Transfer: Transfer from DA as agent to a human agent
- Agent Transfer Condition: Evaluate whether DA-as-agent transfer conditions can be met
- Knowledge Search: Search a knowledge service

State Transition Diagram:

```
graph LR; A[agentInitiation1 Agent Initiation] -- accepted --> B[agentConversa... Agent Conversation]
```

Name: agentInitiation1

Description: Optional short description.



Configure the agent-transfer dialog flow

Agent Initiation

Initiates contact with Oracle B2C

- References name of configured agent integration channel

Component can pass information to agent

- Action strings to return the chat to a specific state in the bot
- Custom properties to pass custom field information

Allows developers to configure messages for when a chat request is accepted or rejected by an agent, or when the bot conversation gets resumed

- Use resource bundles for the messages

agentInitiation

General **Component** Transitions

Agent Integration Channel ⓘ
B2C

Agent Actions ⓘ

Action	Label	Description	
rejected		agent rejects the call	

Subject ⓘ

1 [Redacted]

Chat Response Variable ⓘ Create
Not Defined

Custom Properties ⓘ

1 [Redacted]

agentInitiation

General Component **Transitions**

Next Transition
End Flow (implicit)

Action ⓘ

Action Name	Transition To	
accepted	agentConversation	
error	incidentCreation	
rejected	IncidentCreation	



Configure the agent-transfer dialog flow

Agent Conversation

Requests and handles agent conversation

- References agent integration channel name

Exit keywords allow users to end conversation with agent

- Otherwise, agent too can end conversation

You can override the B2C Wait message where you can access the 'position' and 'waitTime' variables

- Use `${system.message.messagePayload.position}` to determine position in queue
- Use `${system.message.messagePayload.waitTime}` to determine the expected waiting time

Action transitions allow the bot to resume conversation

agentConversation

General **Component** Transitions

Agent Integration Channel [?]

B2c

B2C Wait Message Override [?]

1

I want to talk to an agent

Agent chat session established, Waiting for agent to join.

You are in position 1 in our queue. Expected wait time is 0 minute(s) 14 second(s).

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Other Oracle B2C features

Pass context and user information

- Custom and primary Oracle B2C fields
- Use Agent Initiation component's "Custom Properties" property to pass an object (Map) containing key-value pairs

Sending attachments

- Users and agent can attach images, audio, video, and files to the conversation
- Requires Oracle B2C version 19A and later

Direct chat requests to specific queues

- Oracle B2C uses chat rules and queues to sort incoming chat requests

The screenshot shows the 'Custom Properties' configuration page in Oracle B2C. It features several sections:

- Custom Properties:** A large blacked-out area with a small '1' in the top-left corner, indicating a redacted value.
- Queue ID:** A dropdown menu with '1' selected and an 'Expression' toggle switch to its right.
- Allow Transfer If:** A dropdown menu with 'Agents Are Requesting New Engagements' selected.
- Transcript Date/Time Format:** A large blacked-out area with a small '1' in the top-left corner, indicating a redacted value.
- Transcript Time Zone:** A dropdown menu with 'Not Defined' selected.

How a chat session can be terminated

The agent terminates the session

The agent sends a supported action

- Skill terminates the session and transitions to state corresponding to action

The customer enters one of the specified exit keywords

The session expires after a period of inactivity

A problem occurs with the connection to Oracle B2C

- Transitions to an error state

\n Here are the available actions that you can send to transfer the conversation back to the bot. Prepend the action with a forward slash (for example, /actionName).\n /Out for a coffee break
/Wait : Agent asks to wait
/Terminate : Agent can terminate the session

John Dunbar 09:56 [0 minutes 0 ...

Hi there, my name is John Dunbar. How may I help you today?

talk to agent

Agent chat session established, Waiting for agent to join.

Hi there, my name is John Dunbar. How may I help you today?

bye

Chat session ended. Thanks for chatting with us.



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Examples

User

The user chat interface shows a sequence of messages:

- User: hello
- Assistant: Hello, how can I assist you?
- User: are you a bot?
- Assistant: I am an automated assistant that can assist you with many inquiries!
- User: I want to talk to an agent
- Assistant: Agent chat session established, Waiting for agent to join.
- Assistant: You are in position 1 in our queue. Expected wait time is 0 minute(s) 14 second(s).

Agent

The Incoming Chat notification window displays the following information:

- Incoming Chat**
- Customer: daniel.martins.teixeira@...
- Queue: Default Chat Queue
- Email: anonymous@anonymous.inv...
- Chat subject: I want to talk to an ag...
- Buttons: Accept, Decline
- Progress bar: 7

Examples - the handover

The screenshot displays a customer support interface for 'Supremo Customer Support'. On the left, a 'Chats' sidebar shows an 'Anonymous' chat window with a conversation history and a message from John Dunbar: 'Hi there, my name is John Dunbar. How may I help you today?'. The main workspace is titled 'Anonymous:1200' and contains a 'Verification Guide' with three steps: 1. Verification, 2. Discovery, and 3. Resolution. Below the guide, there are search and selection options for guides. The bottom left of the workspace shows 'Chat routing' information, including the question 'I want to talk to an agent', the queue 'Default Chat Queue', and the assigned agent 'John Dunbar'.



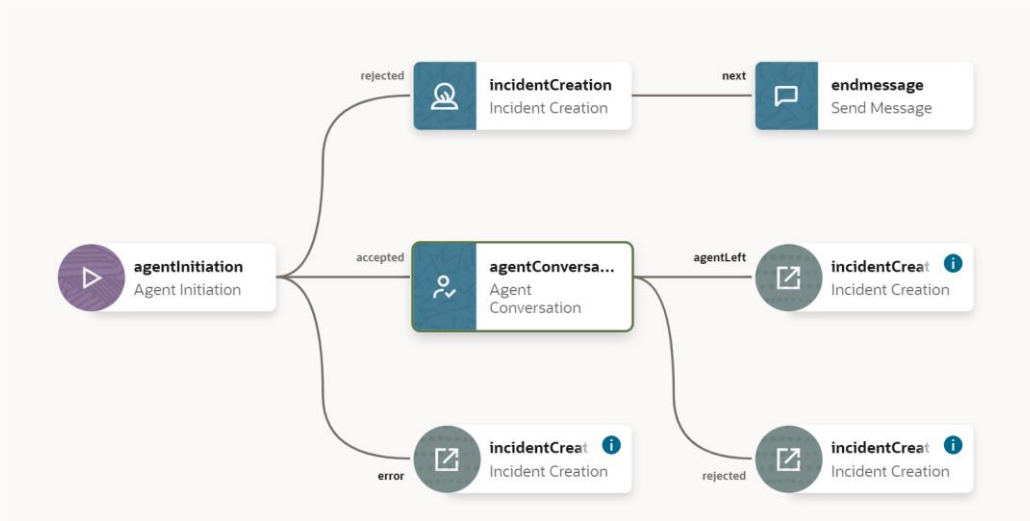
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B2C Incident Creation

You can directly create an B2C incident from the skill

Useful for cases where there is no available agent, or the handover is rejected, or an error occurs



incidentCreation

General Component Transitions

Incident Service Name [?]

B2C_Agent

Subject of Incident [?]

`\${variable_holding_the_message.value}`

Attachment URL [?]

Custom Fields ⁺ [?]

No custom field attributes are available.

Contact Properties ⁺ [?]

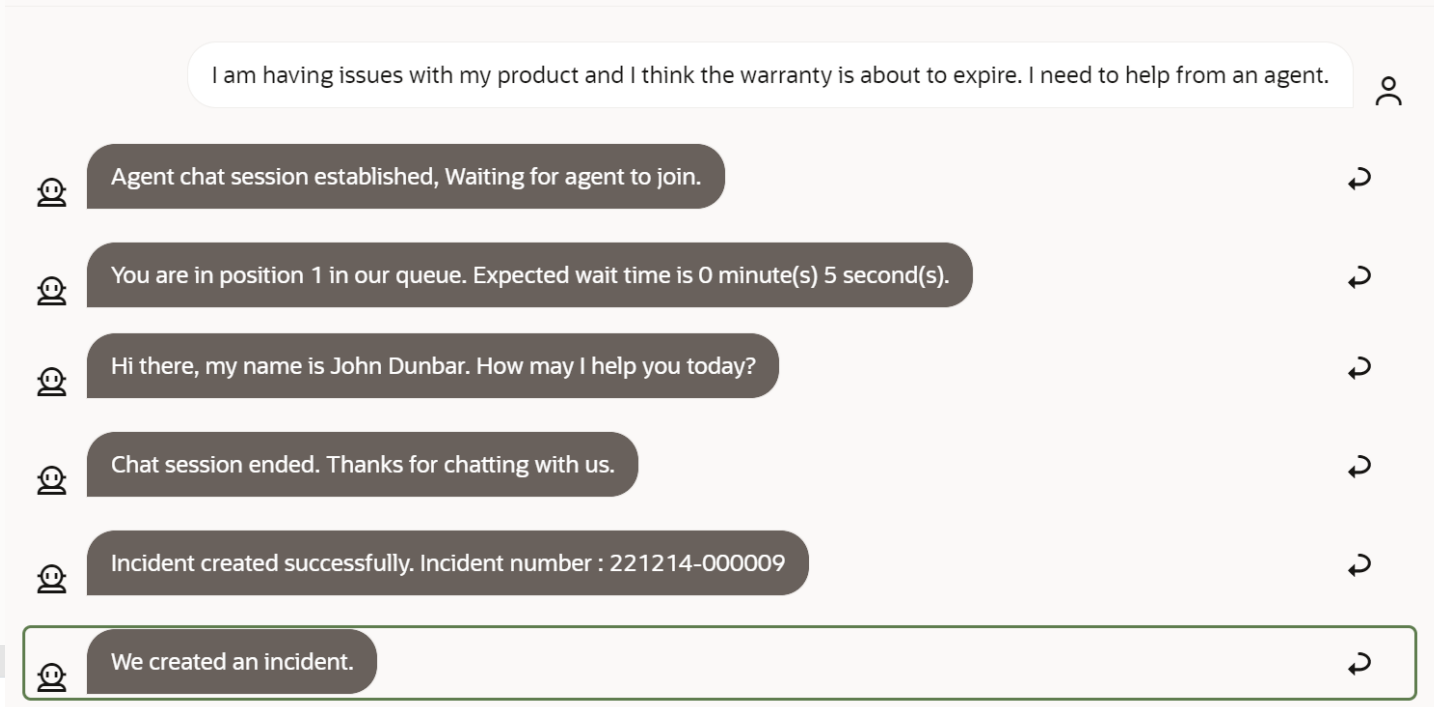
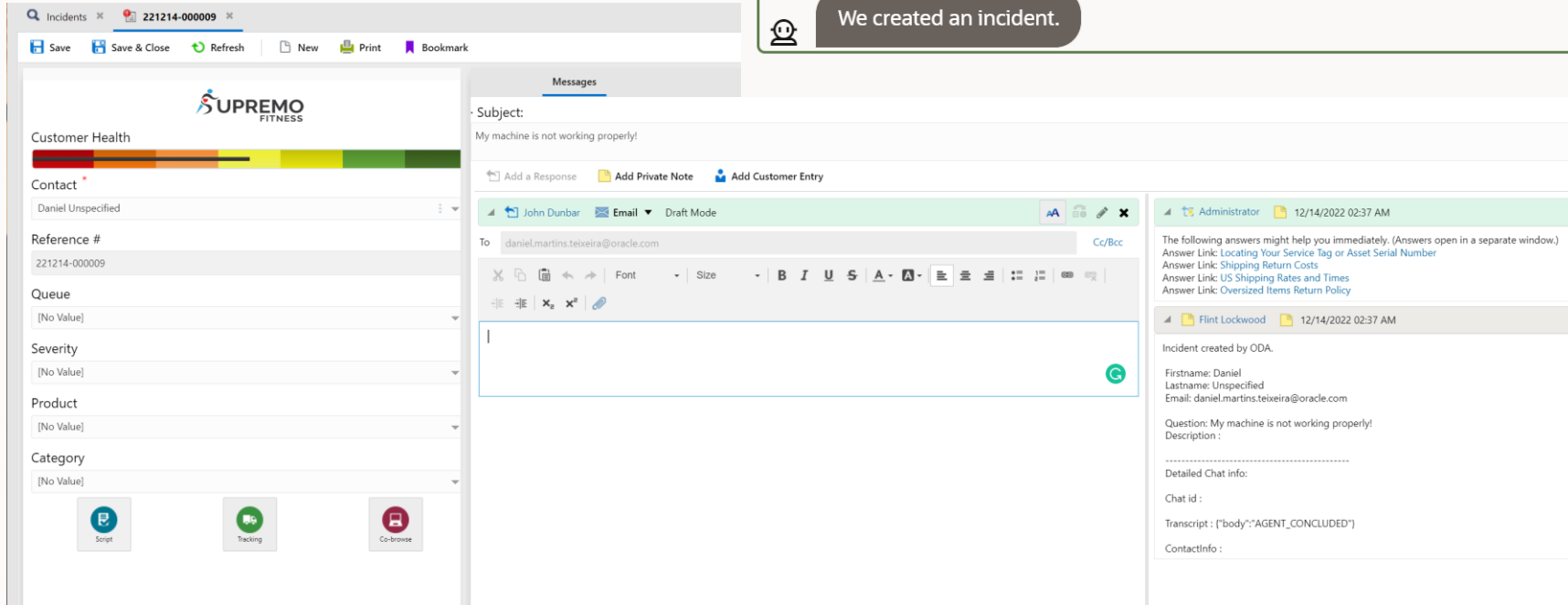
Key	Value	
firstName	Daniel	
email	daniel.martins.teixeira@oracle.com	



B2C Incident Creation

In the conversation on the left, the agent left the chat, which will lead to the transition “Incident Creation”

The transition was defined in the dialog flow



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