

ORACLE

Digital assistant as an agent

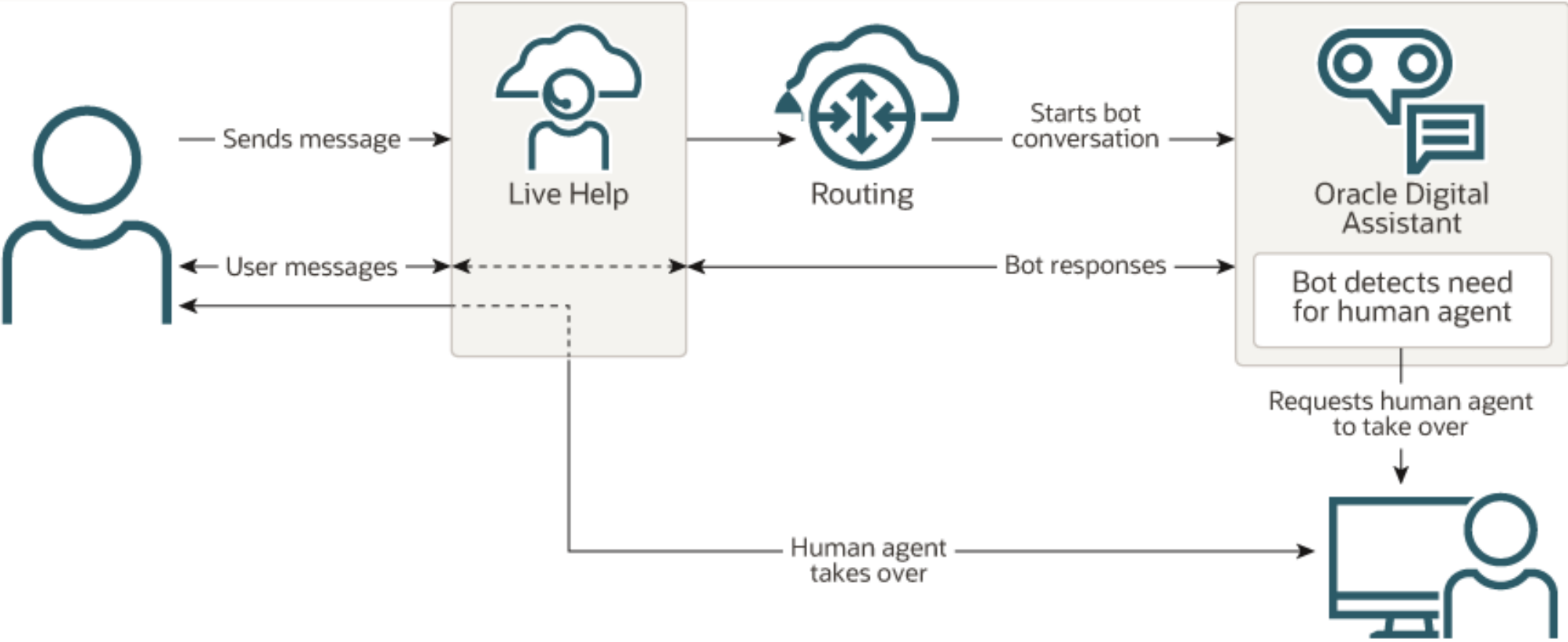
Program Agenda

- 1 Digital assistant as an agent
- 2 Steps to build a DA-as-agent for B2C/Fusion

Program Agenda

- 1 **Digital assistant as an agent**
- 2 Steps to build a DA-as-agent for B2C/Fusion

Digital assistant as an agent



Digital assistant as an agent

How it works

Customer submits chat request

- Pre-chat form

Oracle B2C/Fusion determines request routing

- Define process rules to determine chat queue and profile
 - Profile associated with human agent or digital assistant as agent

Chat form subject line is passed as utterance

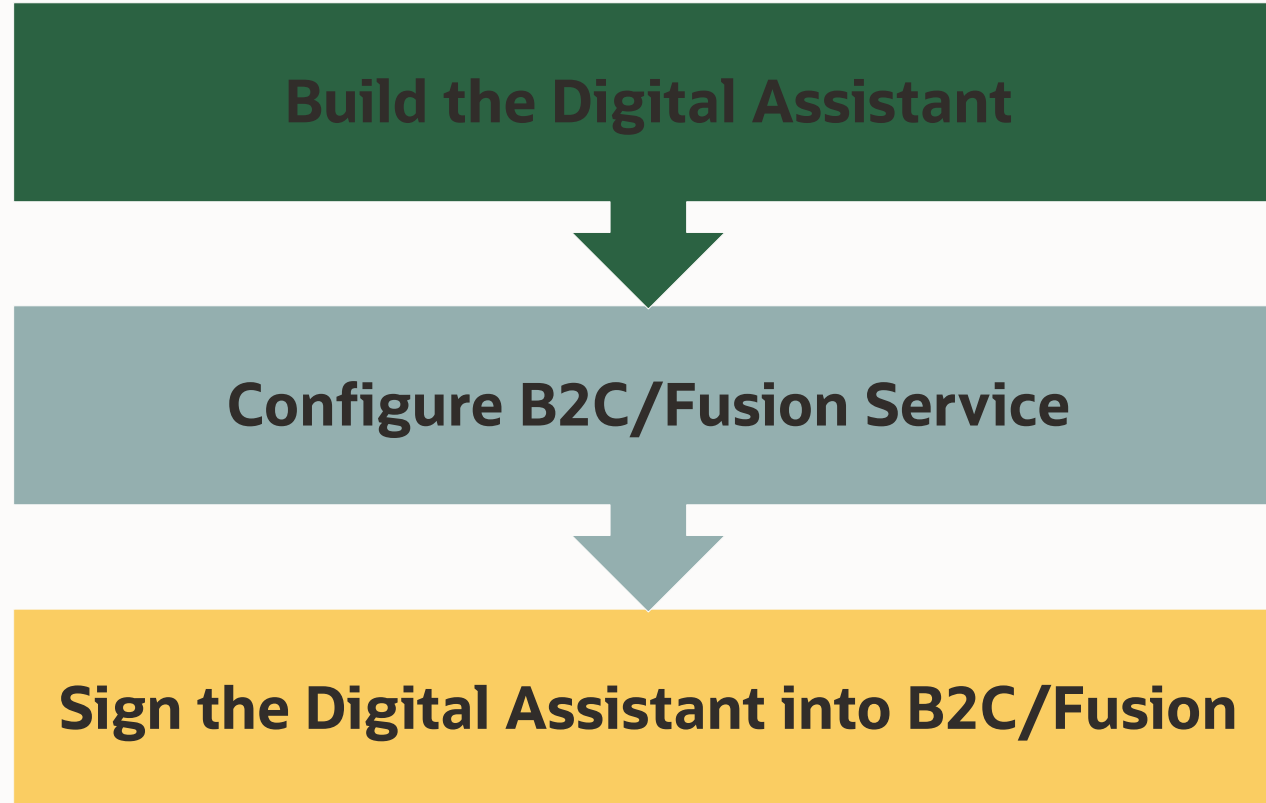
- All other chat form information is passed as custom fields

Oracle B2C/Fusion can transfer to human agent during user conversation

Program Agenda

- 1 Digital assistant as an agent
- 2 **Steps to build a DA as Agent for B2C/Fusion**

Steps to build a DA-as-agent for B2C/Fusion



Build the Digital Assistant

” The DA will act as an agent. That means it should be able to manage a variety of situations.

The DA should be able to handle:

- Small talk
- Greetings
- Requests for help
- FAQ's
- Requests to talk to a human
- Access to a knowledge base

Build the Digital Assistant

Start from template

- **CX Template***
 - Comes with greeting, small talk, FAQ, Knowledge Search, check status, and agent handover skills
 - Fast track your first release
 - Solid foundation to extend from
 - Learn from best practice examples
 - Multi-lingual ready
 - Download template from go.orcl.ai/odacxs-latest
 - Instructions at go.orcl.ai/odacxs-gettingstarted
- **Build your own from scratch**

Build the Digital Assistant Agent Transfer component

Transfers conversation to human agent

- Allows digital assistant as agent to transfer request to a human

By default, requests are routed to agent if at least one has requested to accept a chat or if one is available

- Rule ensures users don't have to wait long for agent

Use ***Allow Transfer If*** component property to change behavior

- agentsAreRequestingNewEngagements (default)
- agentSessionsAreAvailable
- agentsAreAvailable

The screenshot shows the 'Add State' configuration window for an Agent Transfer component. It is divided into two main sections: a left sidebar for component selection and a main configuration area.

Left Sidebar (Service Integration):

- Search: [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 (highlighted)
- Agent Transfer Condition: Evaluate whether DA-as-agent transfer conditions can be met
- Knowledge Search: Search a know
- Incident Cr: Create an Inc

Main Configuration Area:

- Preceding State: agentTransfer (Agent Transfer)
- Transition: Next
- Component Card: agentTransfer1 (Agent Transfer)
- Name: agentTransfer1
- Description: Optional short description.

Component Configuration Panel (agentTransfer):

- General | **Component** | Transitions
- Maximum Wait Time (Seconds) [?]: [] Expression
- Maximum Engagements in Queue [?]: [] Expression
- Agent Availability Status Variable [?]: [Create] Not Defined
- Allow Transfer If [?]: Agents Are Requesting New Engagements
- Custom Properties ⁺: No custom properties are available.



Build the Digital Assistant

Get agent availability and wait time

The DA has a component that allows to get the agent availability and wait time

The **Agent Transfer Condition** component will find out the estimated wait time, display that time, and give the user the opportunity to cancel their request for transfer

This will avoid having the user stuck for an unknown amount of time, and alternatively we can create a B2C/Fusion incident to assist the user

The screenshot shows the 'Add State' configuration window for the 'agentTransferCondition' component. The 'Preceding State' is set to 'agentTransferC...' (Agent Transfer Condition) and the 'Transition' is set to 'Next'. The component is being added to a 'Service Integration' section. The configuration details for the component are as follows:

- Name:** agentTransferCondition1
- Description:** Optional short description.
- Component Configuration:**
 - Custom Properties:** No custom properties are available.
 - Maximum Wait Time (Seconds):** [Input field] Expression:
 - Maximum Engagements in Queue:** [Input field] Expression:
 - Allow Transfer If:** Agents Are Requesting New Engagements
 - Agent Availability Status Variable:** [Create] Not Defined



Build the Digital Assistant

Access contact and chat information

The DA can access the information the customer provided in the pre-chat form. These values will be stored in variables

- `profile.firstName`
- `profile.lastName`
- `profile.email`

There may be extra information such as: *question, product id, category, other custom fields etc.* All of it is stored in the variable

- `profile.contactInfo`

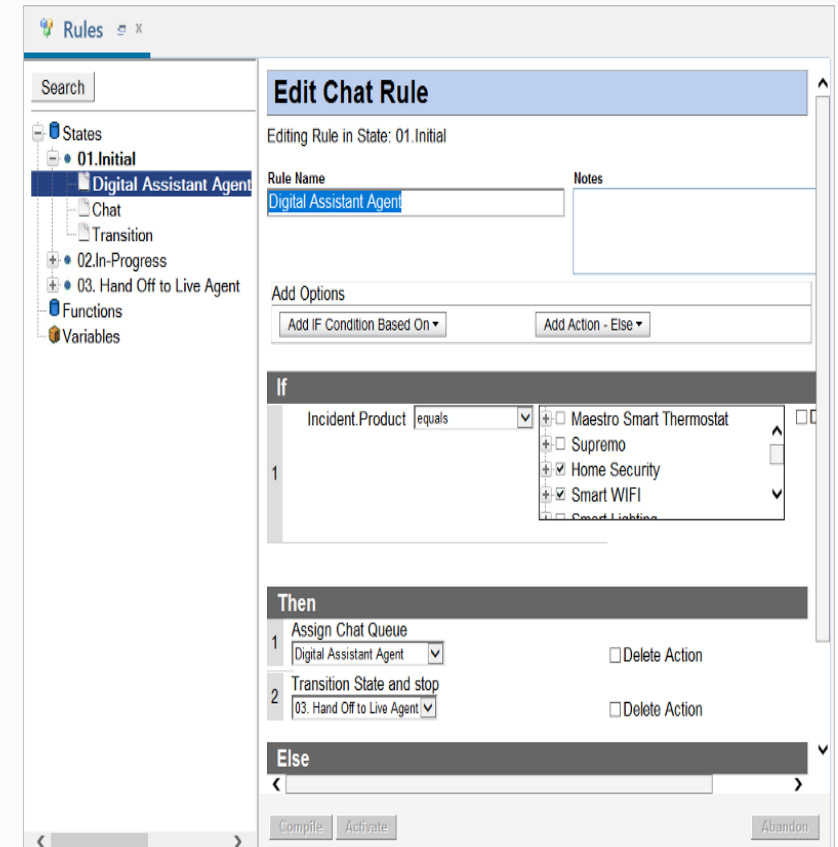
In order to pass this information to the agent we can make use of the ***customProperties*** option in the Agent Transfer component

```
{
  "question": <string>,
  "productId": <number>,
  "orgId": <number>,
  "categoryId": <number>,
  "browser": <string>,
  "ipAddress": <string>,
  "userAgent": <string>,
  "sessionId": <string>,
  "operatingSystem": <string>,
  "customFields": [
    {
      "name": <string-name-of-custom-field>,
      "id": <ID-of-custom-field>,
      "value": <field-value>
    },
    ...
  ]
}
```

Configure B2C Service Part I

In Oracle B2C perform the following:

- Create a digital assistant agent queue
- Create a digital assistant profile for the queue
- Create a digital assistant agent
- Assign digital assistant agent to the profile
- Add chat *“hand off to live agent”* rule
- Add chat *“digital assistant agent”* rule:
 - Assign to digital assistant agent queue
 - Transition to rule to hand off to live agent



Configure B2C Service Part II

Create Chat Launch Page

Default Chat

- Text only, no actions, no horizontal scroll
- If you use a component that displays cards they will output vertically as text
 - Best if you enable auto numbering on *postback* in skill to allow user to enter numbers for choice lists

Oracle Inlay Toolkit

- Can use on non-portal web pages as well as B2C customer portal
- Supports buttons and horizontal scroll

Web Chat for Service (WCFS)

- From 23.02 the WebSDK will be available
- That will bring added flexibility and customizations

A screenshot of a chat launch form titled "Chat". The form is displayed in a window with a dark blue header and standard window controls. It contains several input fields: "Subject", "First Name *", "Last Name *", "Email *", and "Service Request". At the bottom of the form are two buttons: "Cancel" and "Start Chat". Below the form is a text input area with the placeholder "Type a message" and a microphone icon on the right.

Configure Fusion Service

In Oracle Fusion do the following:

- Enable Chat
- Configure the chat server in Identity Cloud Service.
- Create your agents and queues.
- Set up Digital Assistant as an agent channel in ODA.
- Set up your business rules.

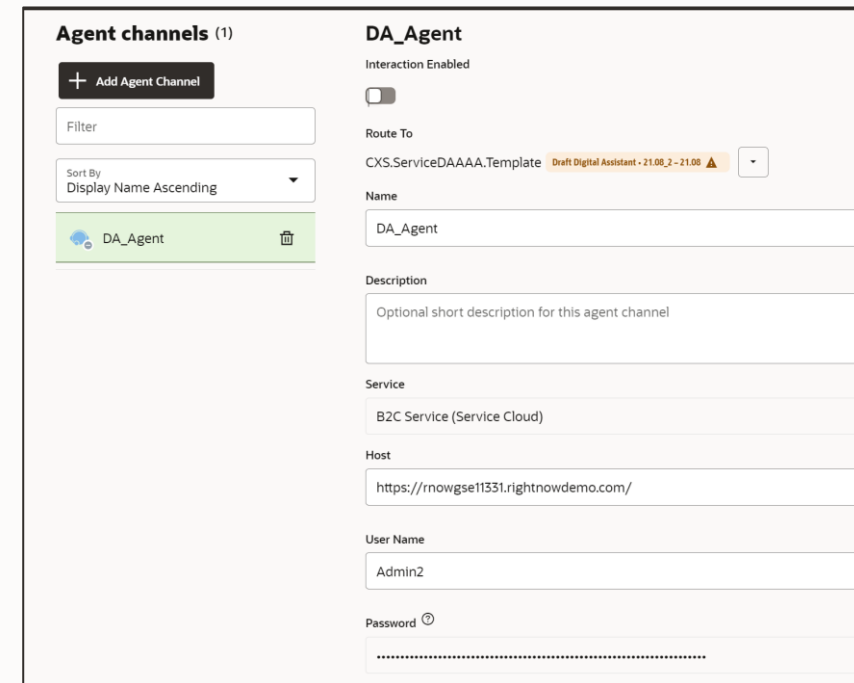
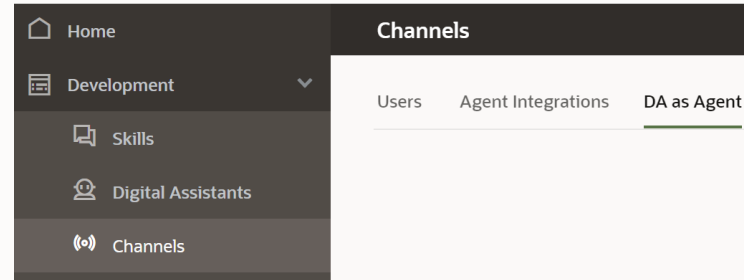
Check Oracle Fusion documentation for all the details on the Fusion setup.

<https://docs.oracle.com/en/cloud/paas/digital-assistant/use-chatbot/da-agent.html#GUID-2F311106-3730-497E-8E52-C38018D74519>

Sign Digital Assistant into B2C/Fusion Service

Create DA as Agent Channel

- Point to host
- Provide Digital Assistant Agent's username and password
- Specify ODA Digital Assistant to route to
- Switch Interaction Enabled to On to sign Digital Assistant Agent into B2C/Fusion
- Digital Assistant now acts as an agent



Fusion Demo

User

wave. Support Sign In Sign Up

Need a helping hand?

Ask us a question

Filter your search

Submit a Service Request Contact Us Register Yourself

Chat

Popular Article

- Fuel, coolant, or oil leaks
- Fuel leak
- High Fuel False Alarm
- Generator won't start
- Burning of excess fuel

Want to talk to someone? Get help over a phone, chat, or email.

Live Chat Support

Type a message

Agent

Stephanie Martin

Check order status 00:11

Subject: Check order status
Email: stephanie.martin_eqje-dev6@oraclepdemos.com

Try Search Contact

Name: Stephanie Martin
Address: 1061 S Sun Dr, Suite 200 LAKE MARY, FL 32746
Email: stephanie.martin_eqje-dev6@oraclepdemos.com

Verify

If there is anything else I can help you with, contact me.

actually I have an issue with my laptop shutting down, can I speak to an agent?

I'm transferring you to a service agent. Hold tight.

Oracle Virtual Assistant left the chat

Aisha Juma joined the chat

Hi, I am chat agent Aisha Juma. How may I help you?

Type # to bring up a list of SmartText.

Recent Service Requests

Show requests only

Filter by Status and Primary Contact

Reference Number	Title	Status	Severity
No data to display.			

Recent Interactions

Direction	Channel	Resource	Created Date
→		Aisha Juma	3/2
→		Aisha Juma	3/2
→		Aisha Juma	3/2
→		Aisha Juma	3/2

SR List Stephanie Martin



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