

ORACLE

Oracle Intelligent Advisor (OPA)

Release 20A Features and Benefits (February 2020)

V1.0

Program agenda

- 1 Overview of Intelligent Advisor
- 2 New features since last release
- 3 For more information

Safe harbor statement

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions.

The development, release, timing, and pricing of any features or functionality described for Oracle's products may change and remains at the sole discretion of Oracle Corporation.

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Experience Economy

**DIGITAL
TRANSFORMATION**

Discover

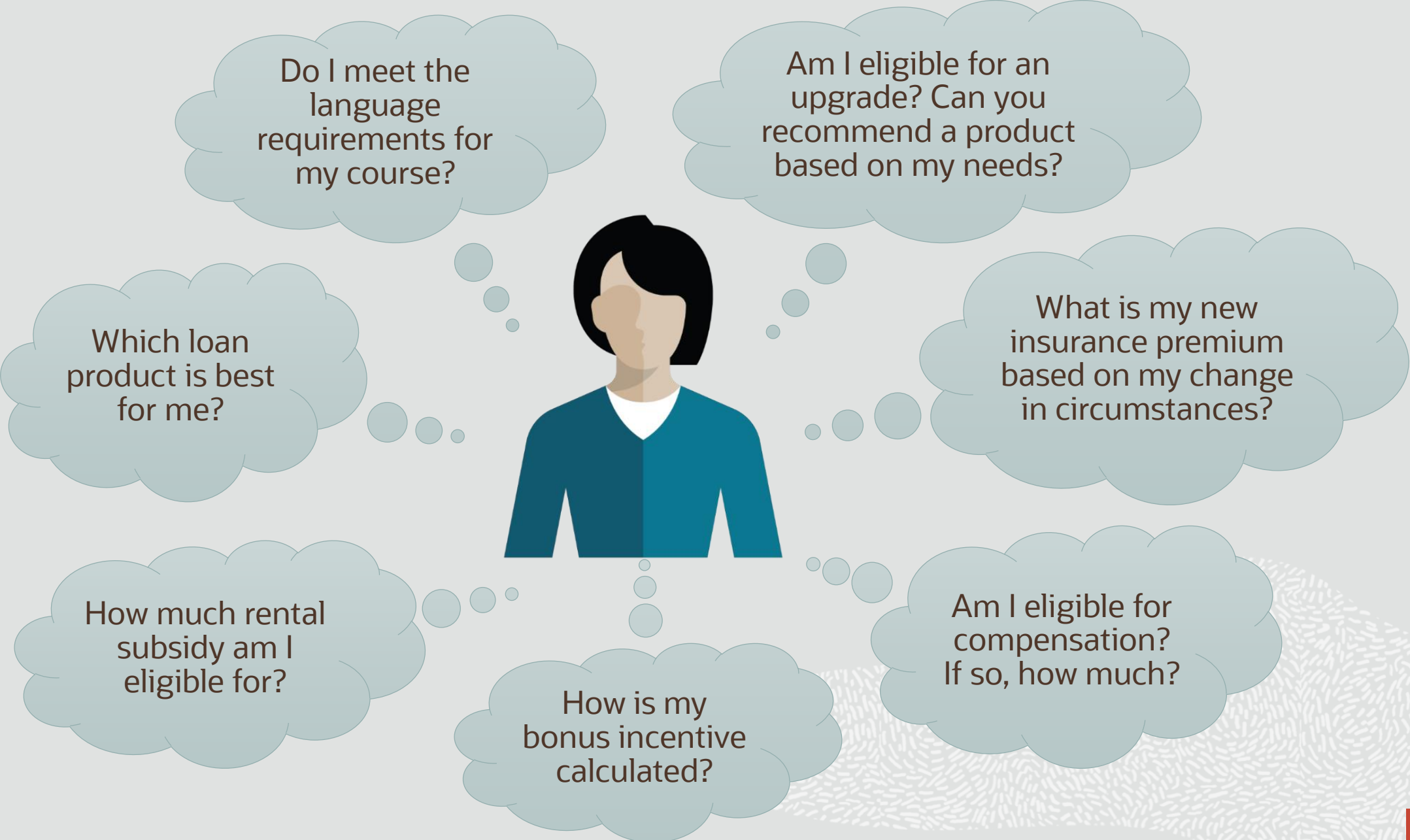
Engage

Consume

Serve

Customers expect...

- Simple
- Accurate
- Personalized service



Do I meet the language requirements for my course?

Am I eligible for an upgrade? Can you recommend a product based on my needs?

Which loan product is best for me?

What is my new insurance premium based on my change in circumstances?

How much rental subsidy am I eligible for?

How is my bonus incentive calculated?

Am I eligible for compensation? If so, how much?

Deliver intelligent advice and automate decisions with **Intelligent Advisor**

Personalized Experiences

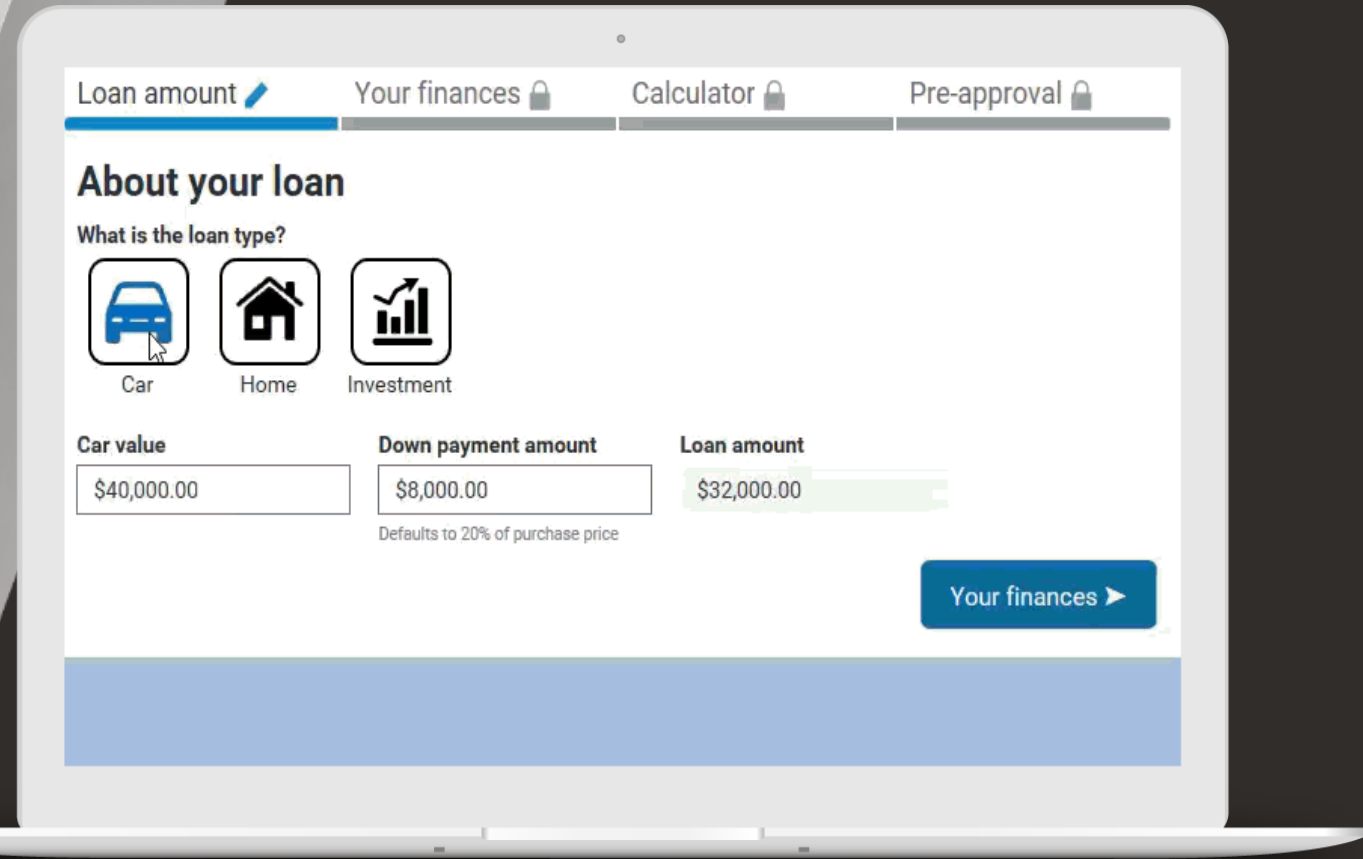
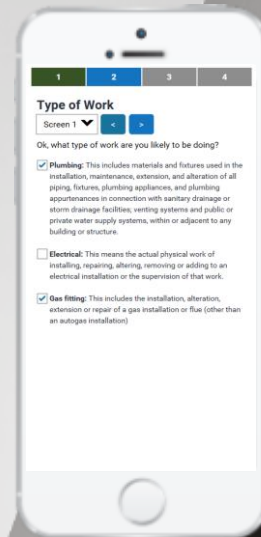
Agile Management

Consistency and Transparency



Deliver personalized experiences

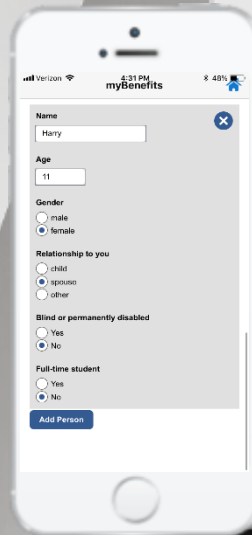
Tailor customer experiences with contextualized, personalized advice using rich intelligent online forms, known as interviews.



Provide agile management

Empower business users to configure rules and design user interface.

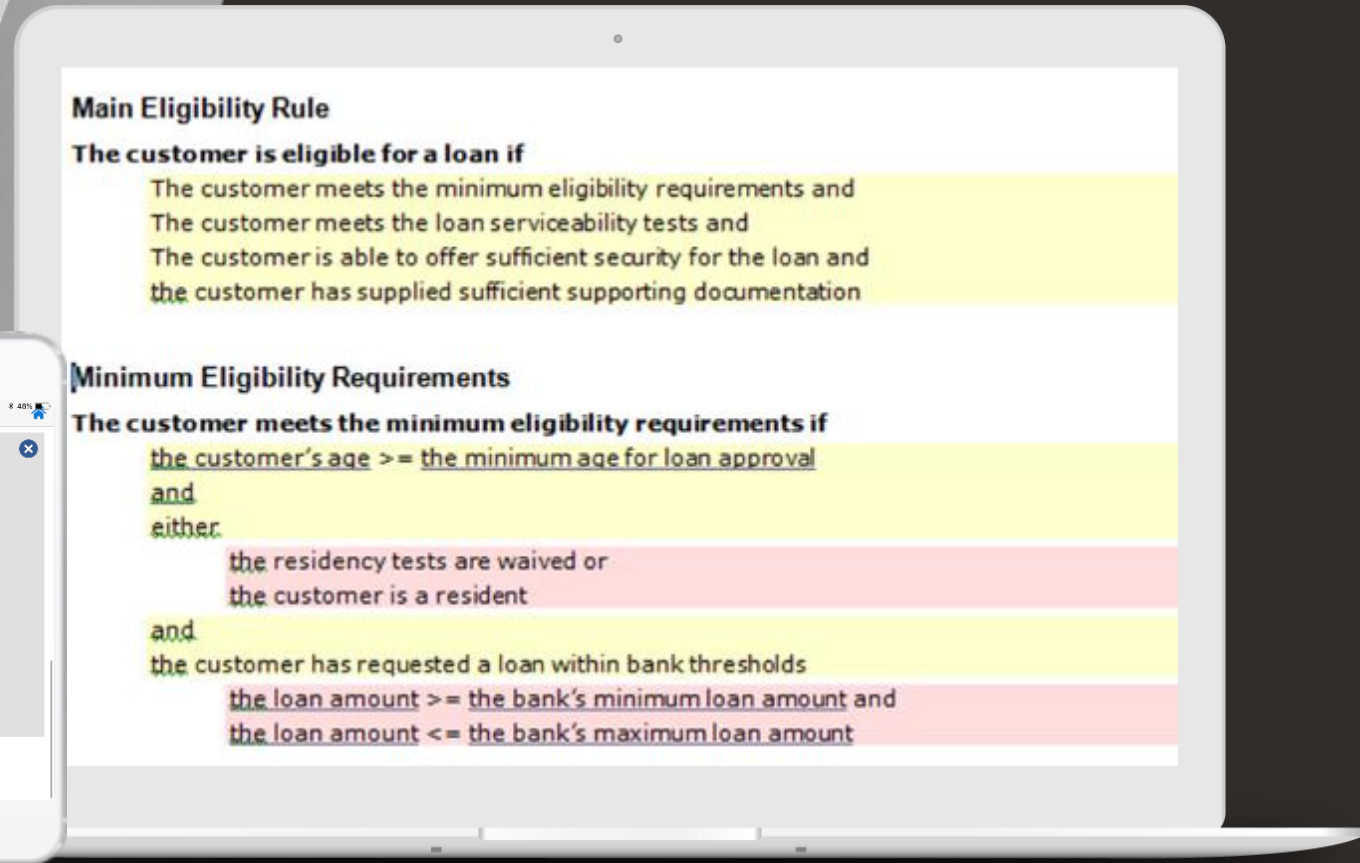
Enable staff to easily manage deployments and integrations.



A smartphone displaying a mobile application interface titled "myBenefits". The screen shows a form for adding a person with the following fields and options:

- Name: Harry
- Age: 11
- Gender: male, female
- Relationship to you: child, spouse, other
- Blind or permanently disabled: Yes, No
- Full-time student: Yes, No

An "Add Person" button is visible at the bottom of the form.



A laptop displaying a rule configuration interface. The screen shows two sections of rules for loan eligibility, with text highlighted in yellow and pink.

Main Eligibility Rule

The customer is eligible for a loan if

- The customer meets the minimum eligibility requirements and
- The customer meets the loan serviceability tests and
- The customer is able to offer sufficient security for the loan and
- the customer has supplied sufficient supporting documentation

Minimum Eligibility Requirements

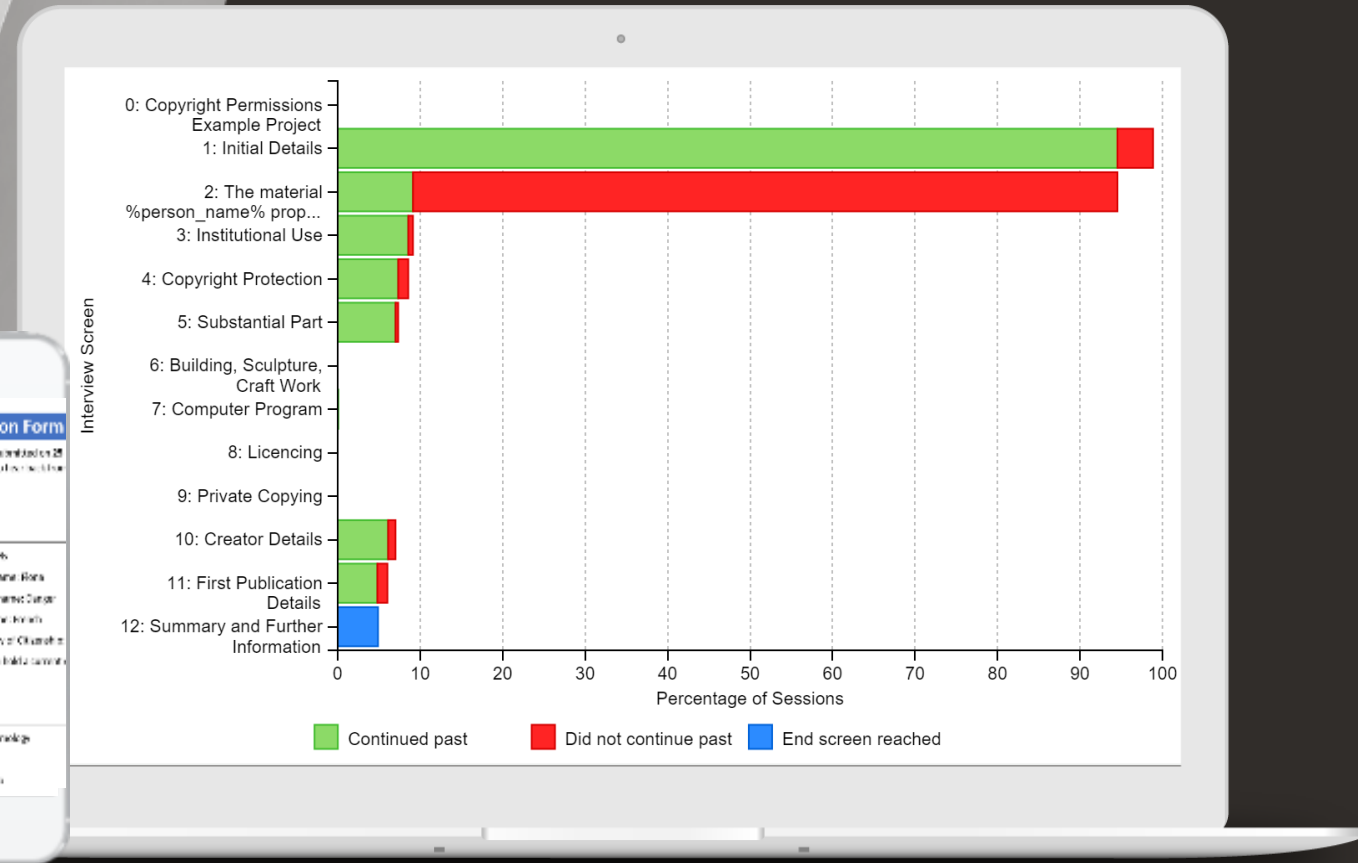
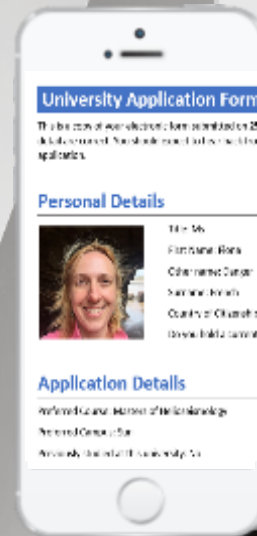
The customer meets the minimum eligibility requirements if

- the customer's age \geq the minimum age for loan approval
- and
- either
 - the residency tests are waived or
 - the customer is a resident
- and
- the customer has requested a loan within bank thresholds
 - the loan amount \geq the bank's minimum loan amount and
 - the loan amount \leq the bank's maximum loan amount

Increase consistency and transparency

Get detailed explanations for automated decisions.

Discover insights into the customer journey with accurate, reliable analytics and reports.



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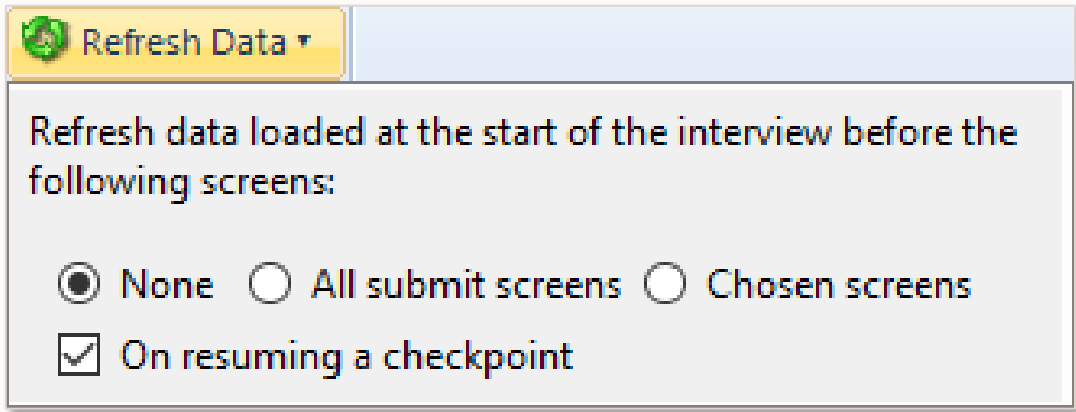


Release highlights

- ✓ **Auto-refresh loaded interview data**
Automate advice for long running cases
- ✓ **Interview extensions for image controls**
Custom visual data entry experiences

Automate advice for long running cases

19D MU1: Auto-refresh loaded interview data



The screenshot shows a configuration dialog box for 'Refresh Data'. The title bar is yellow with a green refresh icon and the text 'Refresh Data'. The main area is light blue and contains the text: 'Refresh data loaded at the start of the interview before the following screens:'. Below this text are three radio button options: 'None' (selected), 'All submit screens', and 'Chosen screens'. At the bottom, there is a checked checkbox for 'On resuming a checkpoint'.

Capability Highlights

- **Automatically reload data** on resume, or on selected screens, to ensure the latest customer information is used when providing advice, making decisions and generating forms
- **Applies only to Engagement Cloud** or other Web Service connections (not currently available for Service Cloud)

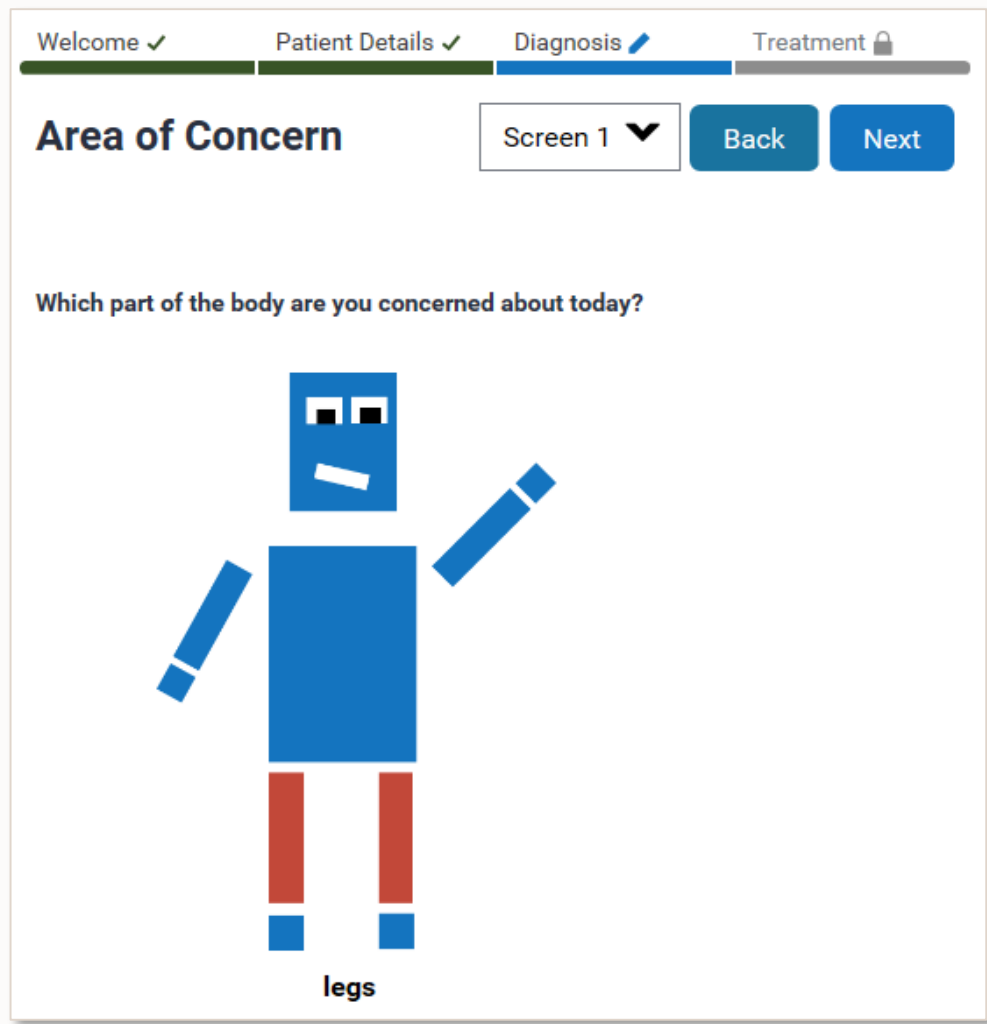
Key Benefits

- **Always provide accurate and up to date advice** even for cases that may be resumed days, weeks or months after they were initially started
- **Build collaborative advice experiences** where other workflow steps can change data that is loaded into Intelligent Advisor interviews



Custom visual data entry experiences

19D MU1: Interview extensions for image controls



Capability Highlights

- **Develop visual controls** that provide dynamic interactive behavior within an interview, using a standard Intelligent Advisor extension

Key Benefits

- **Provide upgrade-safe custom advice experiences** that leverage built-in browser support for images, such as alt-text, click-handlers and more



Other Enhancements



Provide up to date advice as catalog items change

20A: Dynamic Reference Data Loading

Returns Policy ✓ Select

Select

Ok, which of your recent purchases would you like to return?

Approximate purchase date:

09 ▼ 01 ▼ 2019 ▼

Item Name	Purchased on	Return?
Tennis kit	09/10/2019	<input type="checkbox"/>
Swirl pendant with chain	09/01/2019	<input type="checkbox"/>
2 cup coffee machine	08/24/2019	<input checked="" type="checkbox"/>

Back Next

Mapped to: Sale

Load all instances that meet one or more conditions Limit 20

Condition:

```

cust_id = the customer's id and
Sale Date >=the earliest sale date and
Sale Date <=the latest sale date and
amount_sold >= the minimum amount and
amount_sold <= the maximum amount

```

Capability Highlights

- **Load any additional data** from CX Sales and B2B Service, even if unrelated to the contact, opportunity etc. for the interview
- **Define conditions** for which reference data items to load, using filters and rules
- **Data is retrieved automatically** during an interview session, as soon as conditions are met, even on the same screen

Key Benefits

- **Ensure great performance** for interviews that need to load data dynamically from a large set of reference data such as orders or products
- **Maintain a single source of truth** for product catalogs, so that up to date guidance to the most suitable products is always provided





Easily add Intelligent Advisor interviews to Agent workspaces

20A: Native Intelligent Advisor Control in App Composer

Details Layout: Default custom layout: Create Subtab Next Cancel

- Related object ! Create a subtab based on a one-to-many related object or on an intersection object of a many-to-many relationship.
- Child object ! Create a subtab based on a child object.
- Context link ! A context link subtab displays data from any object. To query for the desired set of data, apply search criteria including runtime values of the current object.
- Common component ! Create a subtab to display records for common components such as Notes and Change History.
- Mashup Content ! A mashup content subtab exposes content from a web application or from an internal reusable task flow.
- Intelligent Advisor interview ! Create a subtab to display an Intelligent Advisor interview.

Details Layout: Supervisor Layout: Create Subtab

Basic Information

- * Interview
- * Display Label
- * Display Icon
-
-
-

Edit Contact: Stella Danzig: Loan Advice Actions Save

Overview Choose Your Loan Online Pre-Approval Next Steps

About Your Loan

Loan type

Purchase price	Down payment	Loan amount
<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>

Defaults to 20% of purchase price

[> Next: Loan Options](#)

Capability Highlights

- **Native Intelligent Advisor Interview control** provides dynamic list of available interviews. Option to add additional parameters to further configure the interview on load
- **Engagement Cloud connection type** on Intelligent Advisor Hub provides easy connection setup between Intelligent Advisor and CX Sales and B2B Service (Available now)

Key Benefits

- **Empower business user** themselves to easily roll out consistent advice to agents, improving productivity and reducing their training costs





Intelligent Advice throughout the customer journey

20A: Connector Support for Case object

The image shows two overlapping windows from a software interface. The top window is titled "Mapping Settings" and has a close button (X) in the top right. It is divided into two main sections: "At start of interview" and "At end of interview".

- At start of interview:** A checkbox labeled "Load data related to a particular:" is checked. Below it is a dropdown menu with "Case" selected.
- At end of interview:** Three radio buttons are present: "Don't save" (unselected), "Create new" (unselected), and "Update Case" (selected). Below these is another dropdown menu. A checkbox labeled "Submitted data becomes read-only" is checked.

At the bottom of the "Mapping Settings" window, there is a "Data model" section with the text "Last refreshed: Friday, January 17, 2020 3:10:07 PM" and a "Refresh" button. At the very bottom, it says "Connection: Smc212 change".

The bottom window is titled "Edit Entity 'the primary contact'" and also has a close button (X) in the top right. It contains the following fields:

- A text field containing "the primary contact".
- A "Contained by:" dropdown menu with "Global <Case>" selected.
- A section titled "Identifying attribute" with a dropdown menu containing "the primary contact".
- A section titled "Name" with an empty text field.
- A section titled "Mapping" with a "Mapped to:" dropdown menu. The menu is open, showing a list of options: "Case/Contact", "<not bound>", "Case/caseMessages", "Case/caseResources", "Case/Contact" (highlighted with a blue bar and a mouse cursor), and "Case/Household".
- "OK" and "Cancel" buttons at the bottom right.

Capability Highlights

- **Load, update, and create case records** directly from Intelligent Advsiior interviews
 - Includes support for loading, updating and creating child objects of case (contact, household, message, resource and custom child) within the same interview
 - Optionally attach user-uploaded and generated documents

Key Benefits

- **Provide scripted agent interactions and guided advice** through all stages of the customer journey



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Where to get more information



Intelligent
Advisor
Generally

<http://bit.ly/OPAonOdotcom>



Documentation

<http://bit.ly/OPADoco>



News,
Discussion
and Updates

<http://bit.ly/OPANews>

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