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.

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Experience Economy

Discover
Engage
Consume
Serve
Customers expect...

- Simple
- Accurate
- Personalized service
Which loan product is best for me?

Do I meet the language requirements for my course?

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

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

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

How much rental subsidy am I eligible for?

How is my bonus incentive calculated?
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.
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

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
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

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

**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

Capability Highlights

• **Load, update, and create case records** directly from Intelligent Advisor 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

Documentation

News, Discussion and Updates
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