TABLE OF CONTENTS

UPDATE 20A

REVISION HISTORY

This document will continue to evolve as existing sections change and new information is added. All updates appear in the following table:

Date	Feature	Notes
25 MAR 2020	Element Manager Enhancements	Updated document. Revised feature information.
21 FEB 2020	Enhanced Business Rules Framework	Updated document. Revised Steps to Enable.
19 FEB 2020		Created initial document.

OVERVIEW

This guide outlines the information you need to know about new or improved functionality in Oracle B2C Service and describes any tasks you might need to perform for the update. Each section includes a brief description of the feature, the steps you need to take to enable to begin using the feature, any tips or considerations that you should keep in mind, and the resources available to help you.

For a listing of hardware and software requirements for Oracle products, log in to our support site and access Answer ID 31.

SECURITY & NEW FEATURES

We would like to remind you if your system has modified security structures you may need to advise your security administrator of new features.

GIVE US FEEDBACK

We welcome your comments and suggestions to improve the content. Please send us your feedback

FEATURE SUMMARY

Column Definitions:

Report = New or modified, Oracle-delivered, ready to run reports.
UI or Process-Based: Small Scale = These UI or process-based features are typically comprised of minor field, validation, or program changes. Therefore, the potential impact to users is minimal.
UI or Process-Based: Larger Scale* = These UI or process-based features have more complex designs. Therefore, the potential impact to users is higher.

Features Delivered Disabled = Action is needed BEFORE these features can be used by END USERS. These features are delivered disabled and you choose if and when to enable them. For example, a) new or expanded BI subject areas need to first be incorporated into reports, b) Integration is required to utilize new web services, or c) features must be assigned to user roles before they can be accessed.

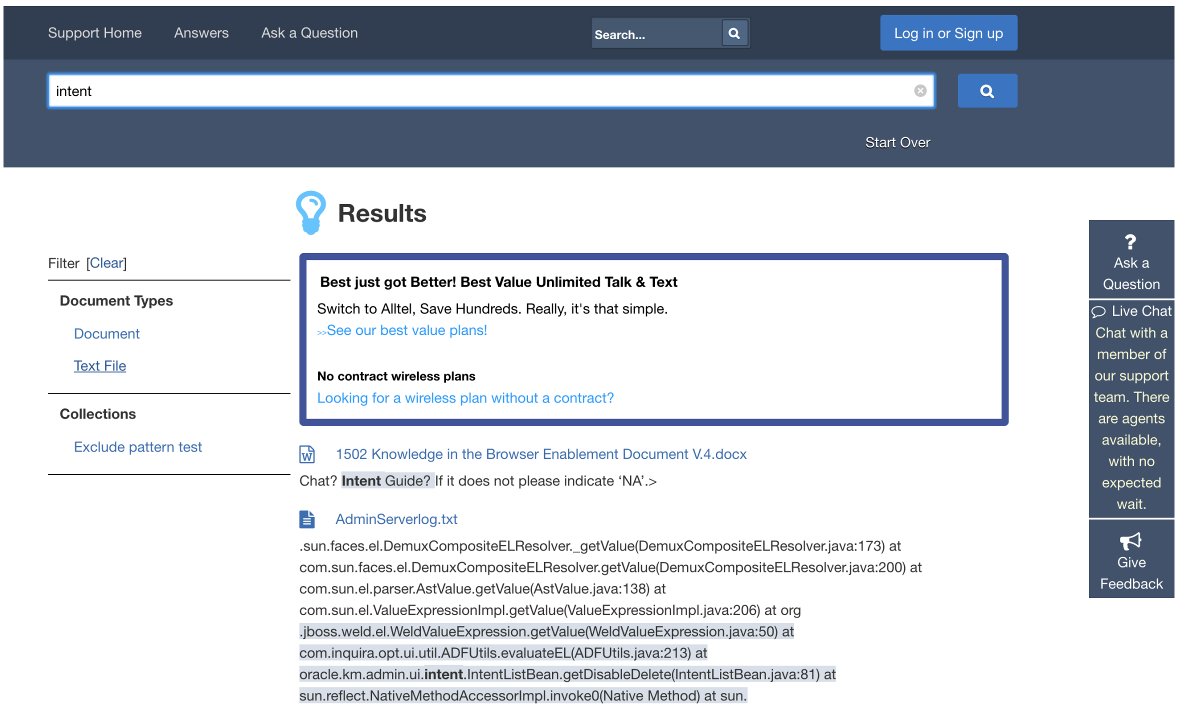
	Ready for Use by End Users (Feature Delivered Enabled) Reports plus Small Scale UI or Process-Based new features will have minimal user impact after an update. Therefore, customer acceptance testing should focus on the Larger Scale UI or Process-Based* new features.			Customer Must Take Action before Use by End Users (Feature Delivered Disabled) Not disruptive as action is required to make these features ready to use. As you selectively choose to leverage, you set your test and roll out timing.
Feature	**Report**	**UI or Process-Based: Small Scale**	**UI or Process-Based: Larger Scale***	
Knowledge Management				
Differentiated UI for Intents		✓		
Answer Special Response Field		✓		
Platform				
Enhanced Business Rules Framework				✓
Element Manager Enhancements				✓
Enhancements in Accounts Password Configuration		✓		
Integrated Sales and Service				✓
Integration between Oracle B2C Service and Oracle CDM Cloud				✓

Feature	Ready for Use by End Users (Feature Delivered Enabled) Reports plus Small Scale UI or Process-Based new features will have minimal user impact after an update. Therefore, customer acceptance testing should focus on the Larger Scale UI or Process-Based* new features.			Customer Must Take Action before Use by End Users (Feature Delivered Disabled) Not disruptive as action is required to make these features ready to use. As you selectively choose to leverage, you set your test and roll out timing.
	Report	UI or Process-Based: Small Scale	UI or Process-Based: Larger Scale*	
Agent Browser Console				
Custom Branding for Browser UI				✔
Agent Browser Workspaces				
Top Level Tab Options for Browser UI		✔		
Flip Tile and Splitter Controls for Agent Browser UI Workspaces				✔
Drag Attachments from Attachment Control		✔		
Custom Browser Tab Title for Browser UI				✔
Digital Customer Service				
Chat Engagement Panel Modernization & Usability Updates			✔	
Top Answers Inlay				✔
Cobrowse Customization Reset Ability		✔		
Implementation Consultant Role		✔		
Modern Digital & Visual Engagement Capabilities for Oracle B2C Service				✔
Contact Center				
Oracle Messaging				✔
Browser UI based Archived Incidents				✔
Field Audit Log Enhancements				✔

KNOWLEDGE MANAGEMENT

DIFFERENTIATED UI FOR INTENTS

Customers typically use Intent to display important content. This feature presents intents with a new styling in order to capture end user attention easily. This styling will be part of OKCS CSS that will be kept in 'utilities' folder so that customers can easily modify it if required.



Intents Displayed In New Styles

STEPS TO ENABLE

You don't need to do anything to enable this feature.

ANSWER SPECIAL RESPONSE FIELD

You can use the answer *Special Response* field to create a short, concise version of an answer solution, which can be used in chat, in search results, and other areas. You can also use the special response to format the answer content based on how and where the answer displays. The *Special Response* field is on the same screen as the answer's question and solution.

To use special responses, there are two API options.

- *SearchContent* returns search results and now includes an option to use the special responses as search excerpts if they exist. If an answer in the search results doesn't have a special response, the API will still return the normally generated excerpt.
- *GetContent* returns an answer's actual content and can be used to return the special response for use in Oracle Digital Assistant or a custom chat solution.

STEPS TO ENABLE

You don't need to do anything to enable this feature.

PLATFORM

ENHANCED BUSINESS RULES FRAMEWORK

In the 17C release, we introduced the Enhanced Business Rules Interface in the Agent Browser UI (BUI) that allowed automating business processes for custom objects. With the 20A release, we are adding support for the Incident, Contact and Organization object in the Enhanced Rules User interface, including complete feature parity with legacy rules for these objects. A fresh new look of Rules Editor on Browser UI makes it much easier and convenient to manage the rules, improving the usability for every administrator especially when managing 100s and 1000s of rules.

- The Enhanced Business Rules Engine:
    - makes creating business rules easier.
    - lets you filter on fields and values in rules to make searching easier.
    - gives access to related objects and attributes when you define rules.
    - lets you export the business rules for ease of reading and sharing.

STEPS TO ENABLE

This feature is currently on limited availability. To enable this feature, you need to log a Service Request (SR).

Once the feature is enabled, you need to use the Agent Browser UI to access this feature.

Do this for each profile that needs to be able to add and edit business rules:

1. Add the **Rules Designer** to the navigation set.
2. Select the **Rules View** and **Rules Edit** check boxes in the administrative permissions.

If you have defined Incident/Contact/Organization rules in the legacy rules engine, you can migrate them to the Enhanced rules framework. See Migrate Business Rules.

KEY RESOURCES

- Overview of Business Rules
- Migrate Business Rules
- Deploy and Roll Back Business Rules

ELEMENT MANAGER ENHANCEMENTS

We have made some significant improvements to Element Manager.

- The user interface now provides history and status information on exports done in the site.
- You can now export and import enhanced business rules elements and dependent elements. These elements include *custom objects, custom attributes, object event handler*, and *standard text/variable*.

- You can import custom objects in the Element Manager service.
- We have improved the configuration setting import process. You can now complete the deployment of configuration settings, message base, and CPM elements in Element manager.
- You can now overwrite some existing elements when you import them to a target site. These elements include *report, dashboard, workflow, workspace, add-ins/extensions, message base*, and *configuration settings*.
- We are announcing general availability of Element Manager REST APIs.

STEPS TO ENABLE

To enable this feature you need to log a Service Request (SR).

The Service Request is only required for the Overwrite capability, which is part of the Element Manager enhancements.

TIPS AND CONSIDERATIONS

Please note the following with regard to the "overwrite" portion of this feature:

- It requires Service Cloud release 19C or later.
- Later in 2020, we will make it automatically available to all customers using release 19C or later.
- It is not yet available to Oracle Government Cloud datacenters, but will be in a future release.

KEY RESOURCES

- Element Manager Documentation

ENHANCEMENTS IN ACCOUNTS PASSWORD CONFIGURATION

To align with DISA requirements, we've increased the maximum number of previous staff account passwords available for reuse from 10 to 24.

STEPS TO ENABLE

You don't need to do anything to enable this feature.

TIPS AND CONSIDERATIONS

This does not change the default configuration for previous account passwords. Only the maximum limit has changed.

KEY RESOURCES

- How You Configure Staff Member Passwords

INTEGRATED SALES AND SERVICE

We have improved the pre-built integration between Oracle CX Sales and Oracle B2C Service. The new integration includes these features.

- A new BUI-based configurator lets administrators configure the integration between CX Sales and B2C Service. The configurator captures the values of the various parameters through the UI and programmatically completes the set up.
- Incidents created in B2C Service can be replicated as service requests in CX Sales. This allows sales representatives to get a quick overview of the incidents associated with his/her sales accounts.
- Sales representatives can view additional details of a service request through a re-direct to B2C Service, which displays the corresponding incident.

STEPS TO ENABLE

1. In the Browser UI, log in into B2C Service as a user with Admin privileges. Note that the setup UI is not available in the .NET interface.
2. Navigate to the **Integrations** link. A UI page for configuring the integration will display.
3. Fill out all the fields on the page. Make sure that the first of two check boxes is checked. This enables the integration between B2C Service and CX Sales.
4. Click **Activate**.

TIPS AND CONSIDERATIONS

- When you specify the username to access B2C Service on the BUI Configurator, use a fictitious username that is not used by any agent.

- The Configurator has two check boxes. Check the first box to enable data synchronization of organizations, contacts, and incidents between B2C Service and CX Sales.
- The configurator performs a great majority of set up tasks required for the integration. However, there are a few tasks that need to be performed on CX Sales manually:
  - Set profile option ZCA_ENABLE_SERVICE_CLOUD_INTEGRATION to **Yes**
  - Disable profile option SVC_ENABLE_CLICK_TO_EDIT
  - Remove privilege SVC_CREATE_SR_PRIV from all sales user roles
  - Remove privilege SVC_EDIT_SR_PRIV from all sales user roles
  - Remove all notification triggers against Service Requests

ROLE INFORMATION

- Administrator

INTEGRATION BETWEEN ORACLE B2C SERVICE AND ORACLE CDM CLOUD

You can use the new out-of-the-box integration between Oracle B2C Service and Oracle Customer Data Management (CDM) Cloud to quickly leverage the data cleansing and enrichment capabilities of CDM.

The integration is bi-directional and involves organizations and contacts. When any insert or update event occurs on an organization or contact, B2C Service shares those details with CDM Cloud asynchronously. The received data is then subjected to rules and algorithms (either manually or automatically or both) to detect potential duplicates.

If duplicates are found, CDM merges it with the original and raises an event. B2C Service subscribes to the merge event and so is notified if an event occurs. All the sub-objects associated with the duplicate contact are moved to be associated with the original contact asynchronously.

STEPS TO ENABLE

1. In the Browser UI, log in into B2C Service as a user with Admin privileges. Note that the setup UI is not available in the .NET interface.
2. Navigate to the **Integrations** link. A UI page for configuring the integration will display.
3. Fill out all the fields on the page. Make sure that the second of the two boxes is checked. This enables the integration between B2C Service and CDM Cloud.
4. Click **Activate**.

TIPS AND CONSIDERATIONS

NOTE: In 20A, while cleansing and enrichment is supported for both organizations and contacts, the merge operation is consumed only for contacts.

- When you specify the username to access B2C Service on the BUI Configurator, use a fictitious username that is not used by any agent.

ROLE INFORMATION

- Administrator

AGENT BROWSER CONSOLE

CUSTOM BRANDING FOR BROWSER UI

Administrators can personalize Agent Browser UI by replacing out of the box Oracle logos with alternative images such as corporate branding. Options include placing an image in the Browser UI header, placing text next to the header, and adding a favicon and title to the browser's tab.

STEPS TO ENABLE

Adding images to Browser UI requires a administrator to create and deploy custom text type configuration settings with specific names (keys). Once deployed, a URL pointing to a hosted image is entered into the configuration verb.

1. Create and deploy a custom configuration setting. Instructions on creating and deploying custom configuration settings can be found here.
2. Each configuration setting must have a specific key:

    - **Brand logo**: Displayed in the upper left header. Default is Oracle logo. Key names and descriptions:
        - CUSTOM_CFG_BUI_LOGO_IMAGE_URL
            - URL for hosted image that will display when the user's preference is set to 'dark grey' or 'dark blue'
        - CUSTOM_CFG_BUI_LOGO_ALT_IMAGE_URL
            - URL for hosted image that will display when the user's preference is set to 'vanilla' or 'light blue'

  - Recommended image aspect ratio is 3:1
  - Any image that can be rendered by a browser is supported although a transparent .png is recommended.

- **Brand logo label:** Text displayed to the right of the 'brand logo'. Default is 'Service Cloud'.
  - This does not require a new custom configuration setting. Instead, enter desired text in the existing message base called SERVICE_CLOUD_LBL
- **Favicon:** Displayed in the browser tab that contains Browser UI. Default is Oracle logo. Key name and description:
  - CUSTOM_CFG_BUI_FAVICON_URL
    - URL for the hosted image.
    - Recommended image aspect ratio is 3:1
    - Supported file types are .png and .ico

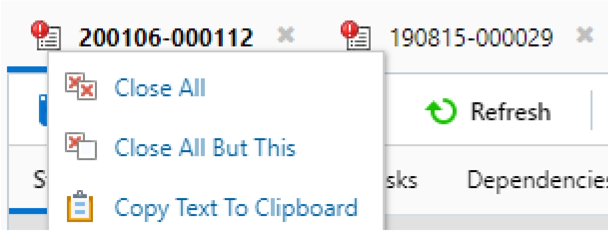
TIPS AND CONSIDERATIONS

- Configuration settings can be associated with one or more site interfaces.
- Images will be scaled to fit the allotted space.
- URLs that cannot be resolved will display broken image icons.
- Out of the box Oracle branding will be displayed where these configuration settings do not exist.
- File size of hosted images should be minimized in order to maximize display performance.

AGENT BROWSER WORKSPACES

TOP LEVEL TAB OPTIONS FOR BROWSER UI

Users can right-click on a top level tab (incidents, contacts, orgs, custom objects, etc.) to reveal a menu with options to 'Close All tabs', 'Close All But This', and 'Copy Text to Clipboard'.



Right-click context menu

STEPS TO ENABLE

You don't need to do anything to enable this feature.

TIPS AND CONSIDERATIONS

Users can also 'Copy Text to Clipboard' by right-clicking on sub-tabs that appear in workgroups.

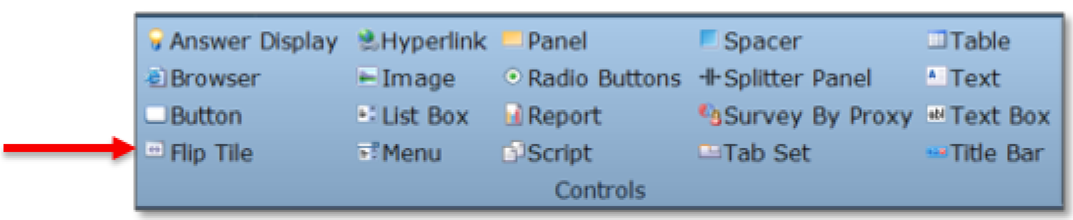
FLIP TILE AND SPLITTER CONTROLS FOR AGENT BROWSER UI WORKSPACES

Administrators can create dynamic, and more modern-looking agent UIs by adding dynamic flip tiles and splitters to workspaces. Flip tiles are a dynamic workspace component that can be flipped by the user at runtime to switch between the flip tile's front and back. Splitters allow agents to manipulate the size of workspace content by dragging horizontal or vertical splitters to expand or reduce the size of various workspace elements.

STEPS TO ENABLE

Flip Tile

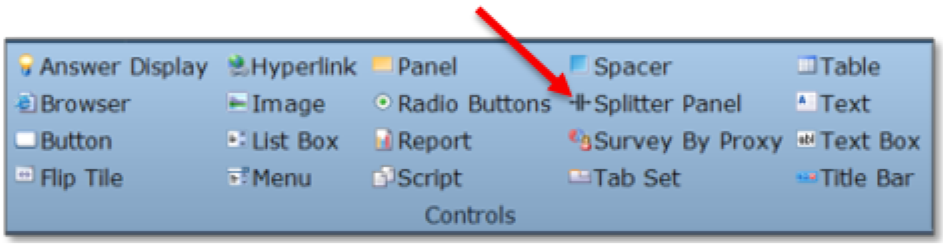
- In the .NET workspace designer, drag the 'flip tile' control from the designer ribbon onto the workspace.
- Place controls or fields on the front and back of the flip tile as desired, using the 'front of tile' and 'back of tile' tabs to switch between the two sides of the tile.
- Save the workspace and preview in Agent Browser UI.



Flip Tile Control

Splitter

- In the .NET workspace designer, drag the 'splitter panel' control from the designer ribbon onto the workspace.
- Place controls or fields on either side of the splitter as desired.
- Save the workspace and preview in Agent Browser UI.



Splitter Panel Control

TIPS AND CONSIDERATIONS

Flip Tile

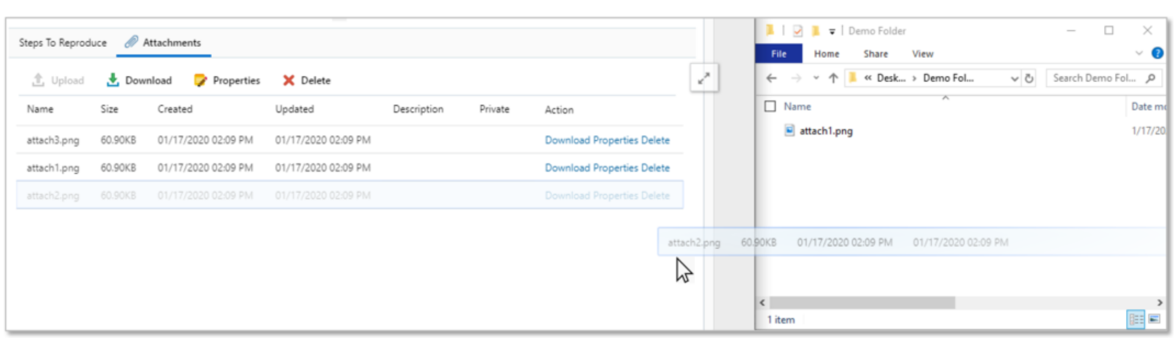
- The flip tile acts as a container than can accept workspace controls and fields on the front and back.
- The flip tile is represented in the .NET workspace designer as a container with two tabs, 'front' and 'back', which allow the workspace administrator to access both sides of the flip tile.
- The flip tile only renders in Agent Browser UI at runtime; it is not available for .NET workspaces.

Splitter

- The splitter is a container that can accept workspace controls and fields.
- Splitters can be nested within other splitters to create a 3-panel layout, for instance.
- Splitter positions do not persist across sessions or records.
- Splitter design options include:
    - Anchor: left/right, top/bottom
    - Position: default distance from anchor
    - Orientation: horizontal or vertical
- The splitter only renders in Agent Browser UI at runtime; it is not available for .NET workspaces.

DRAG ATTACHMENTS FROM ATTACHMENT CONTROL

Agent Browser UI users can now select and drag attachments from the attachment control onto their operating system.



Select and Drag Attachments to Operating System Folder

STEPS TO ENABLE

You don't need to do anything to enable this feature.

CUSTOM BROWSER TAB TITLE FOR BROWSER UI

Administrators can personalize Agent Browser UI by customizing the browser's tab title with internal corporate brand content for example.

STEPS TO ENABLE

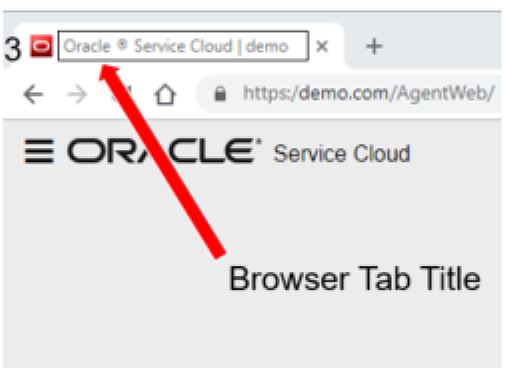
To implement the custom browser tab title, the administrator will create and deploy custom text type configuration settings with a specific name (keys).

1. Create and deploy a custom configuration setting. Instructions on creating and deploying custom configuration settings can be found here.
2. The configuration setting must have a specific key.

   Browser tab title: Displayed in the browser tab adjacent to the favicon. Default is 'Oracle ® Service Cloud | <sitename>' .

   Key name and description: CUSTOM_CFG_BUI_BROWSER_TAB_TEXT

   Enter text to appear in browser tab. Save and refresh Agent Browser UI to confirm.



Location of Browser Tab Title

DIGITAL CUSTOMER SERVICE

CHAT ENGAGEMENT PANEL MODERNIZATION & USABILITY UPDATES

We have improved the agent chat experience within the Browser User Interface to help make your agents more efficient. We streamlined the look and feel of Chat transcripts and added some new features, including:

- an easy to read Chat header with more user-friendly timers.
- a new Service Level Warning to help agents understand when SLA's are met.
- new, easier-to-read icons.
- a modern Chat transcript with bubble formatting and friendly timestamps. This will let agents see more information with less scrolling.

STEPS TO ENABLE

You don't need to do anything to enable this feature.

ROLE INFORMATION

Roles that may use this feature:

- Chat Agent
- Supervisor Agent

TOP ANSWERS INLAY

The new Top Answers Inlay lets B2C customers that use Knowledge Foundation access their knowledge articles from virtually anywhere. Place the inlay on a web page to let end users search and view articles within the customer's web site without having to enter the customer portal pages. End users will find their information faster and easier and will be more satisfied with their experience.

The inlay is similar to the customer portal widget that display popular answers, except that the inlay can be placed on any web page, and only displays the top 10 answers.

STEPS TO ENABLE

1. Ensure that the CX site is on 19C or greater.
2. Define the domains that will display the inlay (such as *mydomain.com*) in the OIT_CORES_WHITELIST configuration variable (eg. mydomain.com). Separate multiple domains with a pipe delimiter, like this: *mydomain.com | yourdomain.com*
3. Add code to the web page that refers to the HTML (inlay) and the Javascript (loader) files. Here's an example.

```
<inlay-oracle-knowledge-top-answers id="topAnswers" class="inlay" site-url="mydomain.widget.
custhelp.com" site-api="mydomain.widget.custhelp.com"></inlay-oracle-knowledge-top-answers>
<script id="oit-loader" src="https://{interface}/latest/common/v0/libs/oit/loader.js" async></script>
```

TIPS AND CONSIDERATIONS

When you add inlays to a page, open the developer console and ensure that everything is loaded properly. If the inlay doesn't load, the console will display a likely cause of the problem.

KEY RESOURCES

- Edit the Popular Published Answers Section
- OIT Registry

COBROWSE CUSTOMIZATION RESET ABILITY

A new button to restore default values from customized UI configuration has been introduced in the Visual Channels (Live LOOK) administration console. When an administrator is ready to restore the configuration to a default state, the administrator can simply click this button. A warning prompt appears so that the administrator can reconfirm the operation, and upon acceptance, the UI configuration is restored to default.

STEPS TO ENABLE

You don't need to do anything to enable this feature.

IMPLEMENTATION CONSULTANT ROLE

We have added a new role called Implementation Consultant to the Visual Channel (Live LOOK) administration console. Implementation Consultants are external, third-party consultants you can hire to configure your Cobrowse instance. Unlike other users, Implementation Consultants can be assigned to configure multiple companies at the same time.

Administrators can assign the Implementation Consultant role to users as well as designate companies for which the users are entitled with this role. At this time, within the set of assigned companies, these users will have privileges to:

- add, edit and delete users.
- manage sub-companies.
- search companies.
- configure Instant and Advanced Cobrowsing.
- customize and mask Cobrowse pages and fields.
- run reports.
- manage sites within the companies.
- configure surveys.
- configure video streaming settings for Video Chat.

STEPS TO ENABLE

You don't need to do anything to enable this feature.

MODERN DIGITAL & VISUAL ENGAGEMENT CAPABILITIES FOR ORACLE B2C SERVICE

As part of the introduction of Live Experience for B2C Service, the following modern digital and visual engagement capabilities are now available:

ORACLE LIVE EXPERIENCE FOR B2C SERVICE - ENTERPRISE

- Web SDK
- Android Customer Experience SDK
- iOS Customer Experience SDK
- Web Agent Experience
- Mobile Agent Experience
- HD Voice, HD Video

- Visual Annotation
- Meetings
- Escalation from Voice to Visual Channels, e.g., Video, Meetings
- SMS Conversations
- PSTN Integration
- Engagement Scenarios
- Self-Service Interfaces: Application Provisioning, Security Configuration, User Management
- Engagement History
- Engagement and Team Performance Reports

ORACLE LIVE EXPERIENCE FOR B2C SERVICE - PREMIUM (cumulative of the capabilities listed under the Enterprise SKU)

- Recording of Voice and Video
- Recording Search and Playback
- In-Channel Identity Verification
- Transcription Integration

ORACLE LIVE EXPERIENCE - Storage

- Each unit of this SKU enables 50 GB of storage, and is mandatory for Recording capabilities listed under Premium

STEPS TO ENABLE

In order to use the capabilities above with B2C Service, you will need to purchase the appropriate SKU(s). After you purchase them, these features will become available through Oracle's ordering and provisioning systems.

CONTACT CENTER

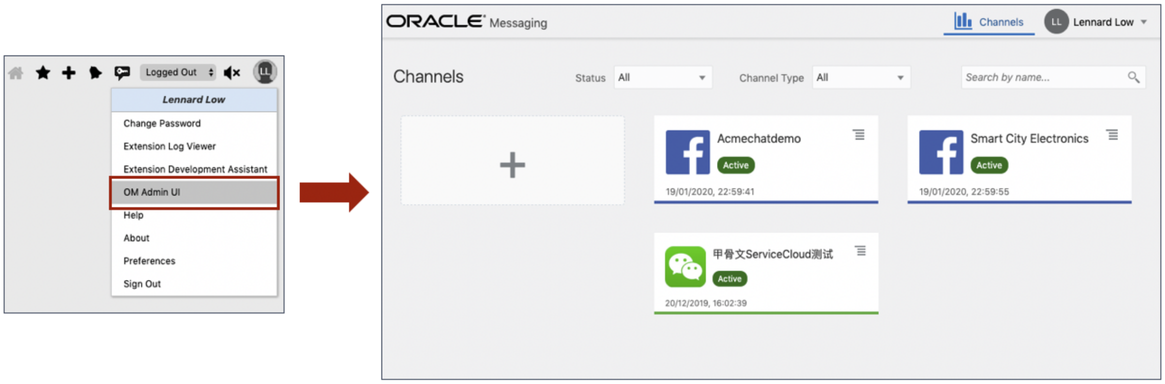
ORACLE MESSAGING

Oracle Messaging (OM) enables direct, real-time communication between your agents and your customers on messaging channels. For this release, the following channels are supported:

- Facebook Messenger
- WeChat
- SMS
- Google Business Messages (beta)

With OM, agents can provide faster and more direct help, leading to better resolutions and more satisfied customers. OM is an integrated feature within Oracle Service Cloud and is automatically included in the Oracle Chat Service.

The OM Administrative Interface, which is accessed from the Browser UI, is used to add and edit channels and pages. Service Cloud receives messages from these channels and fan pages as regular chats through Oracle Chat Service as it is configured in that product. Only the customer’s first name, last name and email address are included when the chat is initiated from OM, so chats will be routed to general queues rather than queues set up for products or categories, or other attributes.



STEPS TO ENABLE

To enable this feature you need to log a Service Request (SR).

In the SR, please indicate that you would like to enable Oracle Messaging and provide your site name.

TIPS AND CONSIDERATIONS

- Oracle Messaging currently only supports inbound-messaging only (i.e. customer-initiated messages). Outbound-messaging (i.e. agent-initiated messaging) will be supported at a later release.
- When setting a Facebook Public Page to be linked to Oracle Messaging, you will need access to the Facebook credentials of the user administering the Facebook Public Page.
- When setting a WeChat Official Account to be linked to Oracle Messaging, the Official Account administrator must authorize the account to be associated with Oracle Messaging.

KEY RESOURCES

- Oracle Messaging

ROLE INFORMATION

Roles that may use this feature:

- Chat Agent
- Supervisor Agent

BROWSER UI BASED ARCHIVED INCIDENTS

You can now access and perform actions on archived incidents using the Agent Browser UI (BUI). Previously, you could only do this via the Agent Desktop.

Specifically, you can:

- access archived incidents in the BUI.
- enable search filters to search archived incidents.
- list view details of archived incidents.
- print, delete, and export archived incidents.

STEPS TO ENABLE

Add the archived incidents component to your navigation menu.

FIELD AUDIT LOG ENHANCEMENTS

By default, changes to most standard contact fields are audited as listed in the Field Audit Logs report. Administrators by using agent Browser UI (BUI) based configuration editor, can now omit some contact fields from auditing.

STEPS TO ENABLE

Make the feature accessible by assigning or updating privileges and/or job roles. Details are provided in the Role section below.

KEY RESOURCES

- Select Contact Fields for Auditing

ROLE INFORMATION

To use Field Audit Log Configuration editor in Browser UI, the user should belong to "Administrator" profile and the component has to be added into Navigation Set Menu to access it.
