(22B) Oracle B2B Service: Service Implementation

Oracle CX Sales and B2B Service

DURATION	MODULES	COURSE CODE
3.5 Days	**24 Lectures**	**—**

Course Overview

This Oracle Engagement Cloud: Service course is intended to build on the knowledge you already have to enable you to perform an initial Service implementation.

What You Will Learn

Course Introduction

- Learning Objectives
- Instructor and Class Participants
- Course Audience
- Course Prerequisites
- Course Goal
- Course Objectives
- Course Methodology
- Course Materials
- Course Agenda

Overview

- Learning Objectives
- Course Focus
- Application Purpose
- Customer Service Scenario
- SR Processing Flow
- Implementation Overview
- Resources
- Lesson Highlights
- Practice

Getting Started

- Learning Objectives
- Service
- Common and Incremental Initial Setup
- Service Setup
- Enable Service
- Configure Service
- Configure Service Usage
- Enable Service Features
- Configure Service Features
- Configure SR Processing
- Configure Communication Channels
- Set Up Agent Productivity Tools
- Create and Publish Self-Service Applications
- Other Configurations
- Recommended Practices
- Lesson Highlights
- Practice

Security

- Learning Objectives
- Service Security Model
- SR Access
- Grant Agents Access to SRs
- SR Security
- Access Groups
- Access Group-Based Security Policies
- Common Considerations with Job Roles
- Lesson Highlights
- Practice

Service Requests

- Learning Objectives
- Service Requests (SRs)
- Status and Status Types
- Actions
- Service Request Details
- Service Request List
- Workspace View
- Business Objects Related to SR Processing
- Message
- Channel
- Social Media Channels
- Queue

- Lesson Highlights

Service Request Options

- Learning Objectives
- Organizing SRs
- Category
- Catalog
- Tag
- Service Processes
- Analytics
- Lesson Highlights
- Practices

Service Entitlements

- Learning Objectives
- Service Entitlement
- Objects Related to Service Entitlements
- Configure Service Entitlements
- Milestones
- Milestone Types
- Milestone Configuration
- Coverage
- Standard Coverages
- Schedules and Exceptions
- Standard Coverage Rules
- Manage Standard Coverages
- Edit Standard Coverage
- Apply Default Coverage to All Customers
- Apply Coverage to a Specific Customer
- Milestones for Installed Base Assets
- Milestones for Installed Base Assets Example
- Lesson Highlights
- Practices

Monitoring Service Entitlements

- Learning Objectives
- Monitor Service Entitlements
- Run a Scheduled Process
- Take Actions Based on Milestone Status
- View Milestone Diagnostics
- Report on Entitlement Performance
- Lesson Highlights

Queues

- Learning Objectives
- Work Assignment Process Overview
- Queues
- Queue Resources
- Queue Usage
- Configure a New Queue
- Default Queue
- Rule-Based Queue Assignment
- Rules and Rule Sets
- Rule Categories
- Queuing Real-Time Work
- Rules Often Use Categories
- Category and Product Group Hierarchy Rules
- Rule-Based Queue Assignment Using Scoring
- Specifying Scores
- Important Configuration Options
- Queues Dashboard
- Recommended Practices
- Lesson Highlights
- Practices

Routing

- Learning Objectives
- Work Assignment Process Overview
- Routing
- Omnichannel
- Presence, Availability, and Capacity
- Non-Real-Time Work
- Real-Time Work
- Global Capacity Limits
- Individual Capacity Limits
- Agent Presence and Capacity Options
- Work Starvation Prevention
- Queue Overflow
- Configure Omnichannel and Queue Overflow
- Third-Party Routing
- Third-Party Routing APIs
- Universal Work Object (UWO)
- Recommended Practices
- Lesson Highlights
- Practice

Notifications

- Learning Objectives
- Notifications
- General Notifications
- Omnichannel Notifications
- Omnichannel Notification Examples
- Real-Time Notifications
- Notification Preferences Manager
- Configure Omnichannel Notifications
- Lesson Highlights

Email

- Learning Objectives
- Email Processing Overview
- Inbound Email Processing
- Email to SR Fields Mapping
- Auto-populated SR Fields
- Implement Inbound Email Processing
- 1. Enable Default Processing
- 2. Redirect Inbound Email
- 3. Create an Email Channel
- 4. Create Email Filters
- 5. Configure Profile Options
- 6. Register Inbound Email Channels
- 7. Set up a Scheduled Process
- 8. Periodically Purge Inbound Email Messages
- Troubleshooting
- Outbound Email
- Setup and Configuration for Outbound Email
- Outbound Email Profile Options
- Email Loops
- Lesson Highlights
- Practices

Email Templates

- Learning Objectives
- Review: Outbound Email
- Review: Message Types
- Email Template
- Email Template Types
- Creating and Editing Email Templates
- Fields and Data in the Email Template
- Assigning Templates to Message Types
- Using Templates

- Preview the Response
- Troubleshooting
- Recommended Practices
- Lesson Highlights
- Practices

Computer Telephony Integration (CTI)

- Learning Objectives
- Computer Telephony Integration (CTI)
- Multichannel Adapter (MCA)
- Live Window
- Notifications
- Cross-Channel Interactions
- Call Flow
- Example of Call Flow
- Call Flow Features
- Reverse Lookup
- Caller Verification
- Screen Pop
- Wrap Up
- Interaction Logging
- Configuring CTI and Call Flow
- Configure Live Window and Notifications
- Configure Cross-Channel Interactions
- Configure Call Flow
- Configure Screen Pop
- Screen Pop Rules
- Screen Pop Pages
- Screen Pop Tokens
- Lesson Highlights
- Practice

Chat

- Learning Objectives
- Chat
- Chat For a DCS Application User
- Chat For a Website User
- Chat For the Agent
- Typical Chat Flow
- Chat Transcript
- Chat Implementation
- Implement DCS Application Chat Component
- Implement Chat Inlay
- Implement Chat For the Agent
- Configure Chat Processing

- Configure Live Window
- Configure Chat Transcript
- Lesson Highlights

Cobrowse

- Learning Objectives
- Overview
- Typical Cobrowse Flow
- Deployment Considerations
- Manage Cobrowse
- Configure Cobrowse
- Implement Cobrowse
- Lesson Highlights

Action Plans

- Learning Objectives
- Action Plans
- Agent Experience
- Action Precedence
- Admin Tasks
- Action Categories (Optional)
- Action Plan Template Categories (Optional)
- Create Actions
- Attribute Mappings
- Status Mapping
- Dependencies
- Create an Action Plan Template
- Action Plan Default Calendar View
- Selecting the Schedule Source
- Action Plan Analytics
- Lesson Highlights
- Practice

Productivity Tools

- Learning Objectives
- Agent Productivity
- Keyboard Shortcuts
- Keyboard Shortcut Configuration
- SmartText
- Enable SmartText
- Access SmartText
- Insert SmartText
- SmartText Privileges
- Author SmartText

- Create and Edit SmartText
- Use Placeholders in SmartText
- Save Personal SmartText
- Set Global Scope for SmartText
- Recommended Practices
- Lesson Highlights
- Practices

Creating Knowledge Content

- Learning Objectives
- Knowledge Management
- Knowledge Consumer Access
- Knowledge Article Authoring
- Author Access
- Authoring Process
- 1. Select a Content Type (Template)
- 2. Select a Publishing Locale
- 3. Populate Fields
- 4. Add Metadata
- 5. Publish the Article
- Content Collections
- Content Collection Creation Process
- 1. Define the Collection
- 2. Describe the Collection
- 3. Set Collection Access
- 4. Enable the Collection
- Knowledge Analytics
- Lesson Highlights
- Practices

Implementing Knowledge Management

- Learning Objectives
- Implementation Overview
- Implementing Knowledge
- 1. Enable the Knowledge Management Feature
- 2. Enable the SR Knowledge Panel
- 3. Configure Profile Options
- 4. Manage Locales
- 5. Manage Content Types
- 6. Configure User Groups
- 7. Configure Knowledge Search
- 8. Enable Article Statuses
- 9. Manage Roles and Privileges
- 10. Run Knowledge Search Processes
- 11. (Optional) Configure the My Knowledge Page

- 12. (Optional) Configure Knowledge External Links
- Recommendations
- Lesson Highlights
- Practice

Tailoring the User Experience

- Learning Objectives
- Dynamic Layouts
- Service Request Layouts
- Service Request Standard Layouts
- Service Request Dynamic Layouts
- Special Layout Regions
- Spotlight Region
- Right Panel
- Solution Region
- Configure a Dynamic Layout for a Page
- 1. Modify or Duplicate an Existing Layout
- 2. Configure the Conditions
- 3. Test the Results
- Lesson Highlights

Multiple Business Units

- Learning Objectives
- Review: Multiple Business Units
- Multiple Business Units in the Application
- Service Request Flow Example
- Configure Multiple Business Units
- 1. Enable Multiple Business Units
- 2. Create Business Units (BUs)
- 3. Associate BUs with Resource Organizations
- 4. Specify BU-Specific Service Request Categories
- 5. Specify BU-Specific Product Groups
- 6. Specify BU-Specific Communication Channels
- 7. Manage BU-Specific Outbound Email Profile Values
- 8. Specify BU-Specific Templates
- 9. Specify BU-Specific Milestones
- Results
- Lesson Highlights
- Practices

Digital Customer Service (DCS) Overview

- Learning Objectives
- Digital Customer Service (DCS)
- DCS Application Usage

- Visual Builder
- Prerequisite Tasks
- Set Up Oracle Identity
- Set Up Visual Builder
- Set Up the Application
- Lesson Highlights

Digital Customer Service (DCS) Application Development

- Learning Objectives
- DCS Application Development
- Typical Visual Application Development Workflow
- 1. Create a Visual Application
- 2. Set Up Service Connections
- 3. Build the Application
- Pages
- Flows
- Action Chains and Events
- UI Components
- 4. Brand the Application
- 5. Secure the Application
- 6. Stage and Test the Application
- 7. Publish the Application
- Localization
- Recommended Practices
- Lesson Highlights
- A Integrations
- Learning Objectives A-2
- Review: Integration Options A-3
- Predefined Integrations A-4
- Oracle SCM Integration A-5
- Example Scenario A-6
- Installed Base Assets A-7
- Reference A-9
- Oracle Field Service Integration A-10
- Example Scenario A-11
- Standalone Work Orders A-13
- Reference A-15
- Oracle IoT Integration A-16
- Example Scenario A-17
- Reference A-19
- Oracle Intelligent Advisor Integration A-20
- Example Scenario A-22
- Reference A-23
- Service Logistics A-24
- Additional Integrations A-25
- Lesson Highlights A-26

- B Survey Integration Framework
- Learning Objectives B-2
- Surveys B-3
- Survey Integration Framework B-4
- Application B-5
- Oracle Integration B-6
- Decision Model Examples B-8
- Third-Party Survey Engine B-9
- Survey Questions B-10
- Survey Analytics B-11
- Survey Implementation B-12
- Application Implementation B-13
- Enable Survey Feature B-14
- Manage Survey Objects B-15
- Manage Survey Products B-16
- Manage Survey Configuration B-17
- Manage Survey Templates B-18
- Lesson Highlights B-19
- C Business Unit SR Security
- Learning Objectives C-2
- Predefined Service Request Security C-3
- Review: Data Security Policies C-4
- Restrict Visibility to Service Requests C-6
- Determine the Underlying Duty Role that Contains the Privilege C-7
- Create a Copy of the Duty Role C-8
- Add a More-Restrictive Data Security Policy to the Copy C-9
- Create a Copy of the Job Role C-10
- Reassign Users the New Job Role C-11
- Review: Functional Privileges C-12
- Restrict Modification of Service Requests C-14
- Determine the Underlying Duty Role that Contains the Privilege C-15
- Create a Copy of the Duty Role C-16
- Create a Copy of the Job Role C-17
- Reassign Users the New Job Role C-18
- Lesson Highlights C-19
- Practices C-20
- D Workflows
- Learning Objectives D-2
- Object Workflows D-3
- Scenario 1: Escalating a Service Request D-5
- Scenario 2: Requiring Approval to Resolve an SR D-7
- Scenario 3: When an SR is Updated by Email, Send an Agent Notification D-10
- Lesson Highlights D-13