(23A) Oracle B2C Service Administration

Oracle CX Sales and B2B Service

DURATION	MODULES	COURSE CODE
5 Days	**28 Lectures**	**—**

Course Overview

B2C Service Administration training is a hands-on course that teaches you how to execute the basic administrative functions of Oracle B2C Service, a powerful platform designed to help drive positive customer interactions. It covers initial set up tasks, configuration, modifying and automating the user interfaces and processes, knowledge foundation administration and customer/agent processes for handling service requests and chat. It covers use of new Agent Browser User Interface functionality, including Enhanced Business Rules and Element Manager.

What You Will Learn

B2C Service Administration Overview

- Objectives
- Oracle B2C Service
- Oracle B2C Service for High-Volume Transactions
- Oracle B2C Service: Self-Service Is the Aim
- Oracle B2C Service: Assisted Service
- Oracle B2C Service: Service Console
- Oracle B2C Service: Service Console Automation Features
- Key Business Objects in B2C Service
- Contact
- Organization
- Incident
- Queue
- Answer
- Community Discussion
- Sample Flow
- Architecture
- Site Versus Interface
- Hosting
- Customer Portal

- Customer Portal: Search
- Service Console: . NET Service Console Client
- Service Console Installation
- Considerations
- Resources
- Support Site (cx.rightnow.com)
- B2C Service Documentation
- Documentation Home Page (docs.oracle.com)
- Webinars
- Oracle B2C Service Learning Subscription
- Topic Highlights
- Practices

.NET Service Console User Interface

- Objectives
- Service Console (Agent Desktop)
- Core Administrator Areas
- Agent Desktop Layout (default look and feel)
- Navigation Pane (Left)
- Content Pane
- Reports
- Workspace
- Workspaces: Multi Edit
- Explorers
- Dashboard
- Navigation Pane (Right)
- Customizable Layout
- Ribbon
- Quick Access Toolbar
- File Menu
- File > Links
- File > Help
- Context Sensitive Help
- File > Community
- File > Options
- File > Record
- Shortcut Keys (or HotKeys)
- Lesson Highlights
- Practice

Browser UI for Administrators

- Objectives
- Agent Browser User Interface
- BUI Default Layout after Login: Action Center
- Browser User Interface: Common Toolbar Options

- Browser User Interface: A Contacts Navigation Example
- Navigation Pane
- Administrator Start Page
- Content Pane
- Reports
- Workspace: Contact Example
- Dashboard
- Preferences: Customizable Themes
- Preferences: Reports, Chat and Email
- Ribbon
- New Business Objects Button
- Lesson Highlights
- Practices

Configuration Settings

- Objectives
- Business Scenario
- Configuration Settings
- Change Configuration Settings
- 1.Verify Permission
- 2.Locate the Configuration Setting
- Navigate to Configuration Settings
- Use Report Filters to Narrow the List
- Browse Folders
- Search for a Value
- Verify the Setting
- 3. Edit and Save the Change
- 4. Validate the Result
- Export/Import Configuration Settings
- Configuration Setting Examples
- Custom Configurations
- Create New Custom Configuration
- Recommendations / Considerations
- Topic Highlights
- Practice

Navigation Sets, Profiles and Staff Accounts

- Objectives
- Business Scenario
- Staff Management in Oracle B2C Service
- Navigation Sets
- As-Delivered Application
- Create a Navigation Set
- Create a New Navigation Set
- Select Navigation Panels

- Select Reports And Components to Display
- Navigation Set Customization in the Browser UI
- Navigation Set Customization in the .NET console
- Select File Shortcut Options
- Profiles
- Create a Profile
- Create a New Profile
- Administration Permissions
- Organizations and Contacts Permissions
- Service Permissions
- Feedback, Tasks, and Custom Objects Permissions
- Analytics and Reports Permissions
- Staff Account
- Departments
- Create a Staff Account
- Create a New Staff Account (Browser UI)
- Set Account Details
- Set Department Details
- Disabling Staff Accounts
- Password Configuration (.NET Console)
- Topic Highlights
- Practices

Customizable Menus

- Objectives
- Customizable Menus
- System Menus
- Common System Menus
- Incident Statuses
- Incident Statuses: Considerations
- Answer Access Levels Menu
- Answer Access Levels: Considerations
- Answer Statuses Menu – Knowledge Foundation
- Answer Statuses Menu
- Answer Statuses Menu: Considerations
- Other Service Customizable Menus
- Other Common Customizable Menus
- Customizable Menus Administrator Permissions
- Custom Menu Objects
- Countries and Provinces
- Country Input Masks
- Topic Highlights
- Practices

Products, Categories and Dispositions

- Objectives
- Business Scenario
- Classifying Answers
- Classifying Incidents
- Products, Categories, and Dispositions
- Products
- Categories
- Dispositions
- Managing Classifications
- Creating and Editing Classifications
- Setting Classification Visibility
- Reordering Classifications
- Using Built-In Reports to View Classification Usage
- Deleting Classifications
- Restricting Classification Availability by Product
- Linking Products to Categories and Dispositions
- Manual Linking
- Auto-Building Links
- Copying Product Links
- Product Linking: Considerations
- Ensuring Consistent Selection of Classifications
- Classification Level
- Set Minimum Level
- Steps to Configure Products, Categories, and Dispositions
- Lesson Highlights
- Practices

Service Level Agreements

- Objectives
- Business Scenario
- Service Level Agreements (SLAs) in Oracle B2C Service
- Before Creating SLAs
- Holidays
- Default Response Requirements
- Define Default Response Requirements
- Due Dates
- Response Metrics
- Answer Access Levels
- Non-Default Service Level Agreement
- Limits
- Term
- Specific Response Requirements
- Access Levels

- SLA Facts
- Apply an SLA
- Credit an Incident Against an SLA Instance
- Considerations
- Reports
- Lesson Highlights
- Practices

Incident Queues

- Objectives
- Business Scenario
- Queues in Oracle B2C Service
- Queue Types
- Standard Queue
- Round Robin (All) Queue
- Round Robin (Logged In) Queue
- Queue Settings for Pull Queue Types
- Queue Settings
- Inbox Limit
- Pull Quantity
- Pull Policy
- Manual (Pull Policy)
- Strict Priority (Pull Policy)
- First Due (Pull Policy)
- Queue Summary
- Implementing Queues
- Define the Queue(s)
- Assign the Queue to a Profile
- Pull From Single Round Robin Logged In Queue Option
- Considerations
- Reports
- Assignments
- Queue Deletes
- Topic Highlights
- Practices

Mail and Mailboxes

- Objectives
- Business Scenario
- Overview of Email Handling
- Service Mailbox Types
- Service Inbound Mail Processing
- Techmail
- Service Outbound Mail Processing
- Outreach Mail Processing

- Configuration Settings
- Setting Up Email Handling in B2C Service
- Configuring a Service Mailbox
- Enabling an Oracle-Managed Service Mailbox Type
- Default Oracle-Managed Email Outgoing Settings
- Customizing Oracle-Managed Email Outgoing Settings
- Default Oracle Managed Email Incoming Settings
- Customizing Oracle-Managed Email Incoming Settings
- Enabling a General Service Mailbox
- Security Configuration
- Enabling Techmail
- Enabling EGW
- Configuring an Outreach Mailbox
- Troubleshooting and Email Considerations
- Email Considerations
- Bounced Email
- Invalidated Contacts
- Recommendations
- More Information
- Topic Highlights
- Practice

Notifications

- Objectives
- Business Scenario
- Internal Notifications
- Types of Notification
- Broadcast Notifications
- Send Broadcast Notifications
- Viewing Notifications
- Configure Your View of Notifications
- Service Notifications
- Service Notification Messages
- External Notifications: Answer Updates
- Sign Up for Answer Update Notifications
- Viewing Answer Update Notifications
- Topic Highlights
- Practice

Surveys

- Objectives
- Business Scenario
- Surveys in Oracle B2C Service
- Questions
- Question Types

- Choice
- Matrix
- Text
- Create a Survey
- Create a new survey
- Determine Survey Type
- Add Questions
- Work with Survey Tasks
- Determine Audience
- Create Invitation
- Test Survey
- Add Reminders
- Launch Survey
- Analyze Results
- Proxy Survey
- Apply Mobile Optimization
- Considerations
- Topic Highlights
- Practices

Community Self Service

- Objectives
- Business Scenario
- Community Self Service
- Community Questions
- Community Ratings
- Locating Community Discussions
- Discussion Navigation
- Access Control
- Permission Sets
- Permission Set Filters
- Roles
- Community Users
- Enable Access Control for Administrators
- Adjust Profile Settings
- Set Access Control Filter to be used
- Adjust Navigation Set
- Create Custom Contact Workspace
- View and Adjust Access Control Elements
- View and Modify Elements
- Deploy
- View Community Users
- Considerations
- Topic Highlights
- Practices

Element Manager

- Objectives
- How to configure Element Manager Access
- How to use Element Manager to Export: Name Package
- How to use Element Manager to Export: Search and Confirm Elements
- How to use Element Manager to Export: Review Package and then Export
- Importing an Exported Package: Choose the Package File to Import
- Importing an Exported Package: Validate Package
- Importing an Exported Package: Manage Configurations
- Business Benefits: Element Manager
- Topic Highlights
- Practice
- 15A Data Lifecycle Management
- Objectives: Data Lifecycle Management (DLM) 15A-2
- Data Lifecycle Management 15A-3
- What are the Benefits of Using DLM? 15A-4
- Which Objects are supported by DLM? 15A-5
- Procedure for applying a Template based Policy 15A-6
- Template Based Policy – Incidents Example 15A-7
- Procedure for applying a Report based Policy 15A-9
- Report Based Policy: Contacts Example 15A-10
- Requirement for Reports used for DLM filtering 15A-11
- Requirements to Use Data Lifecycle Management 15A-12
- Summary: 15A-13
- Demonstrations: Overview 15A-14
- 15B Demo 1: Data Lifecycle Management Template Based Policy
- Agenda – Data Lifecycle Management 15B-2
- Summary: Demo 1 – Data Lifecycle Management 15B-3
- 15C Demo 2: Data Lifecycle Management Report Based Policy
- Agenda – Demo 2: Data Lifecycle Management 15C-2
- Summary: Demo 2 – Data Lifecycle Management 15C-3

Business Rules: Essentials of Legacy and Enhanced Editors

- Objectives
- Business Scenario
- Business Rules in Oracle B2C Service
- Business Rule
- Rule State for Rules
- Rule State for Records
- Rule Processing
- Rule Condition: “If Condition”
- Rule Condition: “Switch Condition” (Enhanced Rule Editor Only)
- Rule Actions
- Rule Action: Common Incident Actions

- Rule Action: Transition Actions
- Transition State and Stop
- Transition State and Continue
- Stop Processing Rules
- Legacy Rules Editor: Service Console
- Creating an Incident Rule in the Legacy Editor
- Create an Edit Set of Active Rules
- Create a Rule State
- Create Rule
- Order Rules
- Compile
- Activate
- Enhanced Rules Editor: Browser UI
- Creating an Incident Rule in the Enhanced Editor
- Create an Edit Set of Active Rules
- Create a Rule State
- Create Rule
- Create Rule: Enhanced Editor
- Order Rules
- Searching Rules
- Deploy and Rollback
- Testing Rules
- Incident Information (Service Console Only)
- Rule Log
- Naming Recommendations
- Implementation Recommendations
- Migrating Legacy Rules to the Enhanced Rules Editor
- Topic Highlights
- Practices

Business Rules: Managing Rules with the Enhanced Editor – Additional Use Cases

- Objectives
- Additional Common Incident Rule Topics
- Text Filtering Rule
- Text Filtering Rule: IF Condition
- Text Filtering Rule Example: Prevent Incident Creation
- Text Filter Rule Recommendations: Preventing Incident Creation
- Escalation
- Escalation Steps
- Escalation Rules
- Timer Rule
- Timer Rule Actions
- Scheduling Options
- Action Rule
- Escalation Rule Recommendations

- Function
- Function Processing
- Escalation Rules in a Function
- Business Rules: Using Variables
- Business Rules: Creating a Variable
- Variables: Setting Values and Using Values
- Additional Rule Editing Options
- Edit, Copy, and Disable Rules
- Rollback
- Exporting Rules
- Rule Maintenance Considerations
- Topic Highlights
- Practices

Advanced (Skills Based) Routing

- Objectives
- Business Scenario
- When to use Skills-Based Routing
- Skills-Based Routing
- Advanced Routing in Oracle B2C Service
- Setting up Advanced Routing
- Adding and Editing Products and Categories
- Creating an Advanced Routing Queue
- Use a Business Rule to route requests to an Advanced Queue
- Assigning permissions to a profile related to Advanced Routing
- Add Core Skill Options and Supported Languages
- Add Product Skills
- Assign Profile Default Skills/Scores
- Assign Skill Scores to Staff Accounts
- Advanced Routing Flexibility
- Queue Prioritization
- Queue Overflow
- Skill Relaxation
- Test Routing by Using Analytic Reports
- Topic Highlights
- Practice

Chat

- Objectives
- Business Scenario
- Chat in Oracle B2C Service
- Chat Location
- Chats, Incidents, and Rules
- Connecting a Customer Chat Request to an Agent
- Chat Profile Permissions

- Chat Workspaces: .NET Service Console
- Chat Workspace Options: .NET Service Console
- Chat Incident Creation
- Chat Preferences: Browser UI
- Customer Chat Request Availability
- Agent Availability for Chat – Chat Agent Statuses
- Service Console: Agent Availability for Chat
- Agent Browser UI: Agent Availability for Chat
- Setting Chat Service Operating Hours
- Chat Queues
- Distributing Chats to Specialized Queues
- 1. Create Specialized Chat Queues
- 2. Create Business Rules to Assign Chats
- 3. Create Profiles with Specialized Queues
- 4. Assign a Profile with Specialized Chat Queues
- Analytics and Monitoring
- Agent Productivity Tools
- Advanced Routing (Skills Based Routing)
- Topic Highlights
- Practices

Workspaces

- Objectives
- Business Scenario
- Workspaces in Oracle B2C Service
- Workspace
- Workspace Layout in the Browser User Interface
- Workspace Layout in the .NET Service Console
- Workspaces Explorer: .NET Service Console Only
- Workspace Object Type
- Standard Workspaces
- Workspace Designer
- Workspace Components
- Workspace Object
- Multi-Edit Workspaces
- Profile Workspace Assignment
- Workspace Fields and Tabs
- Standard Object Fields
- Workspace Controls
- Field Permissions
- Field Default Values
- Profile Functional Permissions
- Workspace Rules
- Workspace Considerations
- Workspace Analytics

- Workspace Embedded Reports
- Exporting and Importing Workspaces
- Topic Highlights
- Practices

Workspace Rules

- Objectives
- Business Scenario
- Workspace Rules in Oracle B2C Service
- Managing Workspace Rules
- Rule Execution
- Rule Wizard
- Workspace Rule Components
- Triggers
- Conditions
- Actions
- Properties
- Considerations
- Rule Conflicts
- Workspace Rules and Business Rules Best Practices
- Topic Highlights
- Practice

Workflows and Workflow Components

- Objectives
- Business Scenario
- Workflow in Oracle B2C Service
- How are workflows triggered?
- Workflow Example
- Workflow Components
- Working Record
- User Interface Elements
- Automation Elements
- Search Elements
- Decision Elements – Yes/No branching
- Decision Elements – Multi-value branching
- Decision Elements – branching to different UIs
- Connector
- Connector Events and Conditions
- Comment
- Topic Highlights
- Practice

Creating Workflows

- Objectives
- Create Workflows
- Create a New Workflow
- Add Elements and Connectors
- Set Element Properties
- Add Branching
- Test Workflow
- Assign Workflow to Profile
- Creating a Workflow from a Template
- New vs. Edit
- Add Task
- Copy Incident
- Create Contact
- Export Workflow
- Import Workflow
- Considerations
- Topic Highlights
- Practices

Message Bases

- Objectives
- Business Scenario
- Message Base
- Advantages of Message Bases
- Message Base Names
- Change a Message Base
- Verify Permission to Edit Message Bases
- Identify Message Base to Change
- Locate Message Base in Editor
- Edit Value
- Save Value
- Validate New Value
- Language Packs
- Export/Import
- New Message Bases
- Recommendations
- Topic Highlights
- Practice

Message Templates

- Objectives
- Business Scenario
- Messages in Oracle B2C Service

- Message Examples
- Message Templates in Oracle B2C Service
- Message Templates
- Message Templates Types
- Message Template Content
- Merge Fields
- Incident Thread Control
- Conditional Sections
- Global Template
- Disabling Messages
- Editing Message Templates
- Select the Template
- If Necessary, Edit Subject
- If Necessary, Turn Off the Global Template
- Select the Version
- Edit Content
- Validating Message Templates
- Spelling
- Preview
- Proof
- Compare
- Activating Message Templates
- Step 1: Accept Changes
- Step 2: Save Changes
- Step 3: Deploy Changes
- Step 4: Save Deployment Changes
- Restore
- Editing the Global Template
- Incident Response Tracking
- Incident Response Tracking Reports
- Incident Message Transactions
- Considerations
- Topic Highlights
- Practices

Guided Assistance

- Objectives
- Business Scenario
- Guided Assistance in Oracle B2C Service
- Guide Availability
- Guided Assistance Components
- Questions
- Responses and Branching
- Creating a Guide
- Create a Guide

- Add a Question
- Edit Question and Responses
- Add Additional Questions
- Add Response Actions
- Validate
- Preview
- Save
- Add Guide to Workspace
- Export Guide
- Import Guide
- Considerations
- Guided Assistance: Going further
- Topic Highlights
- Practices

Agent Scripts

- Objectives
- Business Scenario
- Agent Scripts
- Scripts Explorer
- Creating an Agent Script
- Script Types
- Pages
- Headers and Footers
- Navigation Panel Control
- Fields
- Controls
- Questions
- Branches
- Advanced Branching
- Rules
- Rule Events
- Managing Agent Scripts
- Providing Agents Access to Scripts
- Exporting and Importing Scripts
- Agent Script Considerations
- Topic Highlights
- Practices

Standard Text and Variables

- Objectives
- Business Scenario
- Standard Text in Oracle B2C Service
- Use Standard Text in an Incident Response – BUI
- Use Standard Text in an Incident Response – Console

- Create or Modify Standard Text
- Hotkey
- Variables
- Using Variables
- Variable Types
- Custom Variables
- Use Variables in Standard Text
- Create a New Custom Variable (.NET Console only)
- Edit a Variable
- System-Defined Variables
- Add System-Defined Variables to Standard Text
- Recommendations
- Topic Highlights
- Practice

Standard Reports

- Objectives
- Business Scenario
- Reports in Oracle B2C Service
- Running / Viewing Reports
- Reports Explorer .NET Service Console
- Reports Explorer Browser UI
- Report Identifier
- Finding a Report: .NET Service Console
- Finding a Report: Browser UI
- Report Types
- Search Reports – .NET Service Console
- Search Reports – Browser UI
- Grid Reports
- Chart Reports
- Chart and Tabular
- Dashboard
- Share Report Data Options
- Publish (only available in .NET Console)
- Schedule (only available in .NET Console)
- Forward
- Export
- Data in Reports
- Report Results
- Report Definition (.NET Console only)
- Viewing the Report Definition
- Report Management (.NET Console only)
- Topic Highlights
- Practices

Custom Reports Introduction

- Objectives
- Business Scenario
- Data
- Data Dictionary
- Custom Reports
- Copy and Edit a Standard Report
- Create New
- Report Designer
- Edit Columns
- Preview
- Make the Custom Report Available
- Data Relationships
- Report Analyzer
- Additional Report Features
- Filters
- Rollup Levels
- Slicing
- Cross Tabs
- Drilldown Levels
- Report Links
- Inline Edit
- Record Commands
- Computations
- Additional Report Styling
- Data Exceptions
- Report Styles
- Report Definition: Export and Import
- Recommendations
- Topic Highlights
- Practice