Oracle Digital Assistant
The Complete Training

ODA as an Agent – ODA Integration with Service Cloud

Topic agenda

1 Introduction to ODA + Service Cloud integration

2 Configuring Service Cloud

3 The out-of-the-box skill

4 Configuring QnA – Intents, answers

**5** Configuring new ODA channel

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Skills

Human agent integration

- Integrate ODA with call center
  - Digital assistant can help with call center load
  - Agents focus
  - Introduce agent as and when it makes sense
    - Escalation, high value call, complex question
- Architecture options
  - Digital assistant fronts call center
 - Digital assistant as an agent
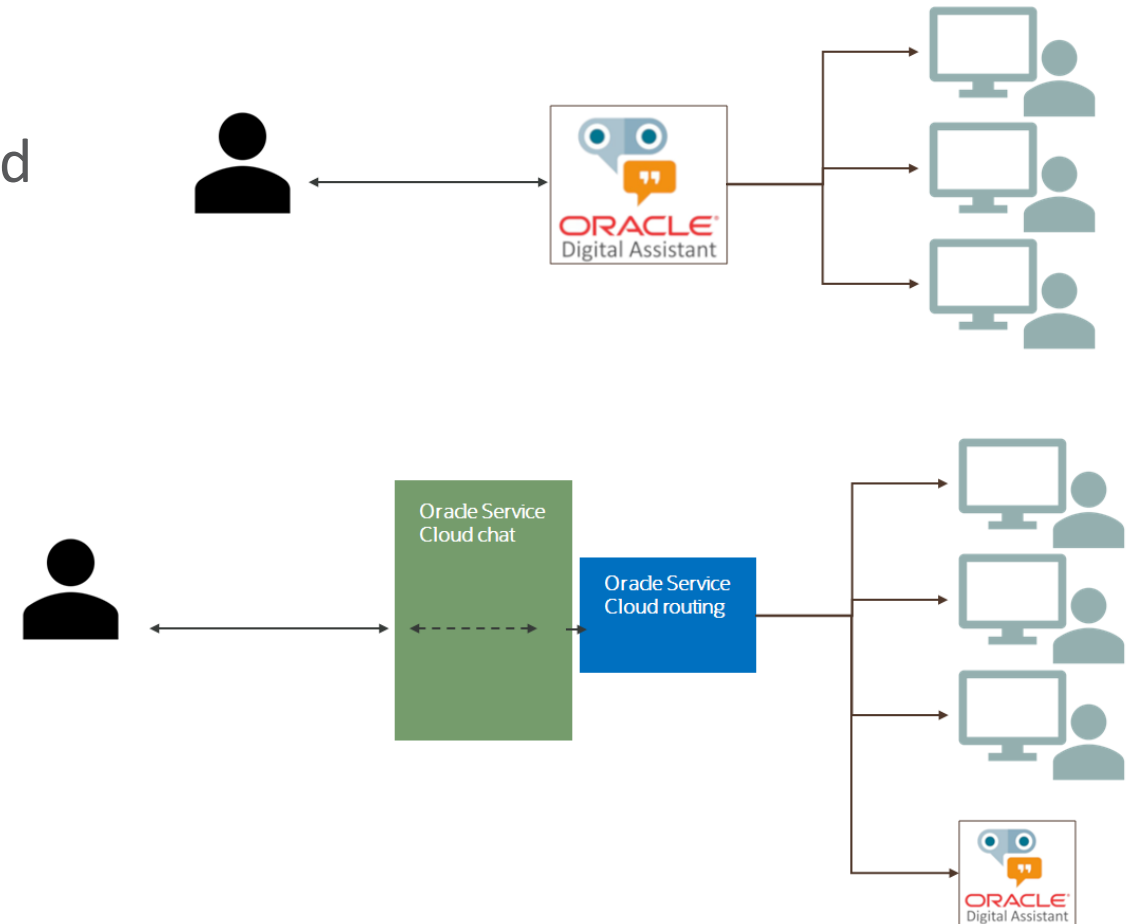
More about option 1 (escalation from DA chat)

- Agents only get calls when escalated so there will always be a conversation hand off.

- It's best used when clients want to have a standalone digital assistant that can also escalate to humans, if needed.

- This approach uses the publicly-available Service Cloud API.

- Not all features of the Service Cloud chat client are available in the API (e.g., typing indicators).

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More about option 2 (ODA as an agent)

- Best used when a client has a "pre-chat form" and an established live chat implementation.

- No disruption to call center or agent workflow. Agents get calls using the same interface experience as before.

- All features of the Service Cloud chat client are available for the users and agents.

- This approach is only available to ODA (no other chat providers will have this level of integration).

- Clients must have Service Cloud 19c or later.

In this presentation we will focus on
ODA as an Agent

Image courtesy of pixabay.com
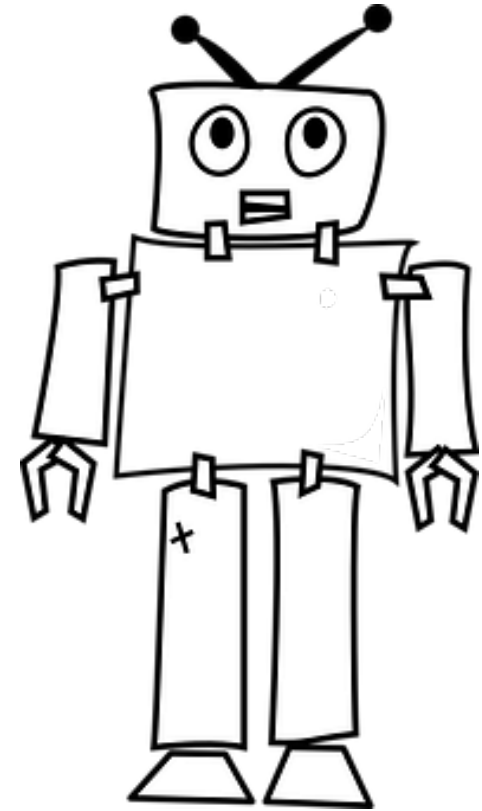
How the ODA as an agent framework works

- A customer submits a chat request – typically via a pre-chat form.

- Oracle Service Cloud determines where to route the chat:
  - Rule processing determines queue and looks for profile associated with the queue.
  - Determines agents associated with the profile and routes to an available agent.
    - If the agent is a DA, the conversation routed to the DA that's associated with channel. Otherwise, it's routed to a human agent.

- Oracle Service Cloud chat page is opened and chat begins.

- If needed, the DA can transfer the conversation to a human agent.
  - Service Cloud uses rule processing to decide which queue to route the request.

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# Basic Steps for creating a DA agent

- Build a DA-as-Agent digital assistant:
  - The dialog appears in an Oracle Service Cloud chat console or web page.
  - Use the System.AgentTransfer component to transfer the chat to an agent.
- Configure Oracle Service Cloud:
  - Create a digital-assistant profile for a digital-assistant agent and a digital-assistant-escalation profile
  - You also need a rule to direct the desired chats to the digital-assistant profile and a rule to handle transfers from the digital-assistant agent to a human agent.
- Sign your digital assistant into Oracle Service Cloud:
  - Create a DA as Agent channel.

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Configuring Service Cloud

- An Oracle Service Cloud system administrator must first set up queues, profiles, and agents.

- To complete the DA setup, you need Service Cloud host and the DA agent's user name and password.
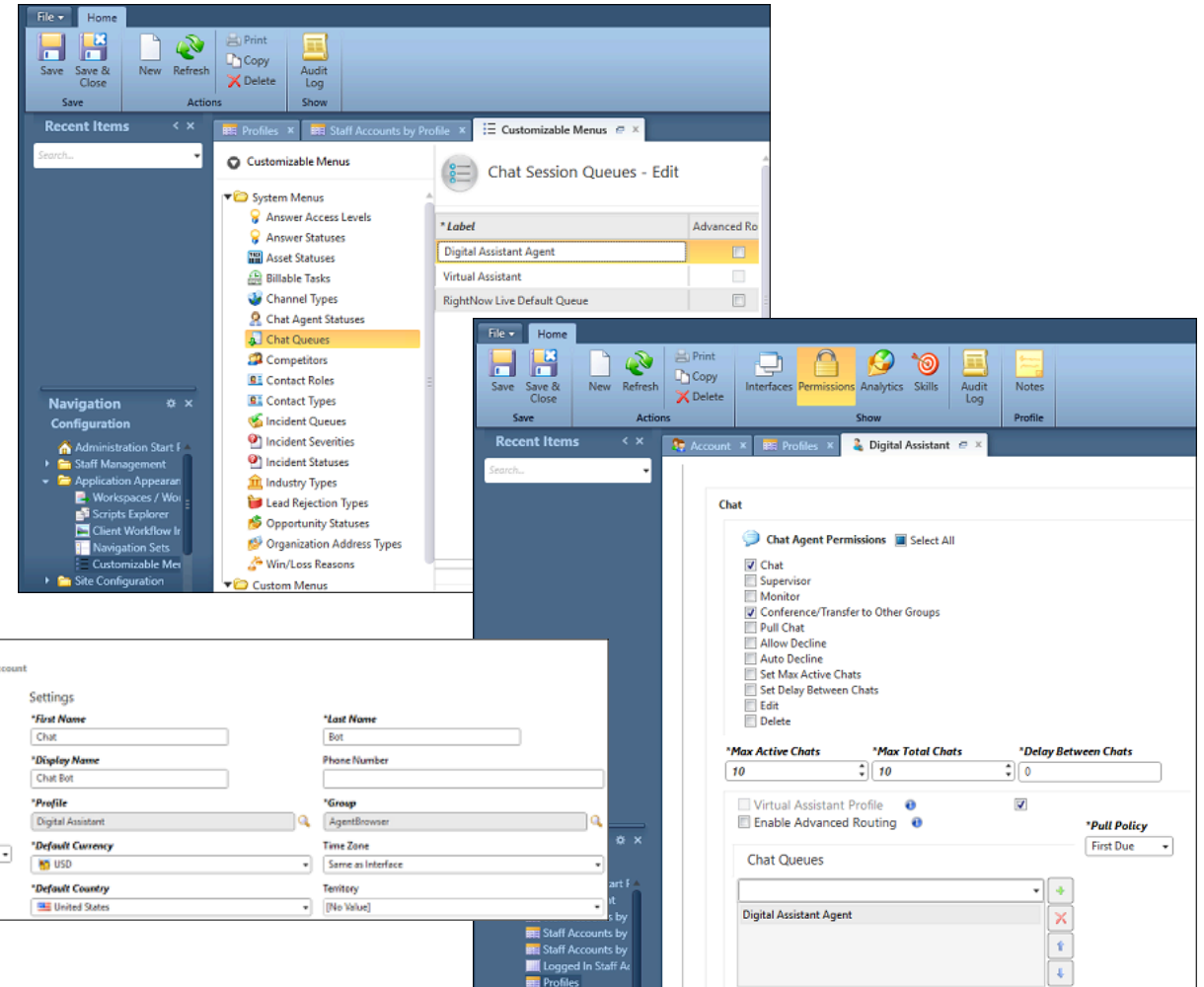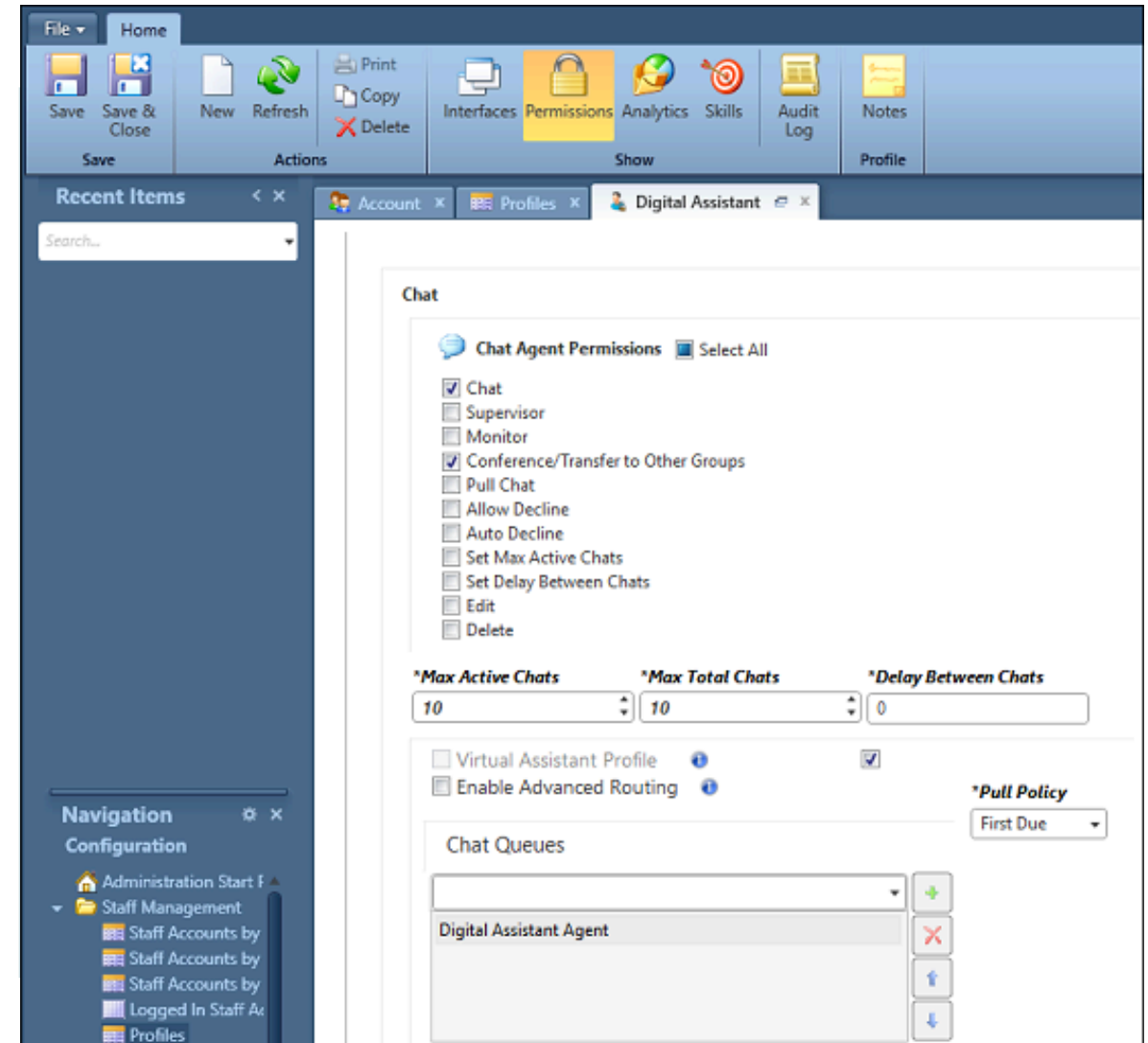
Create a DA queue

- Queues enable automatic sorting of incoming chats.

- Create a queue that you'll use to route chat sessions to the *digital-assistant* agent that's associated with the *digital-assistant* profile.
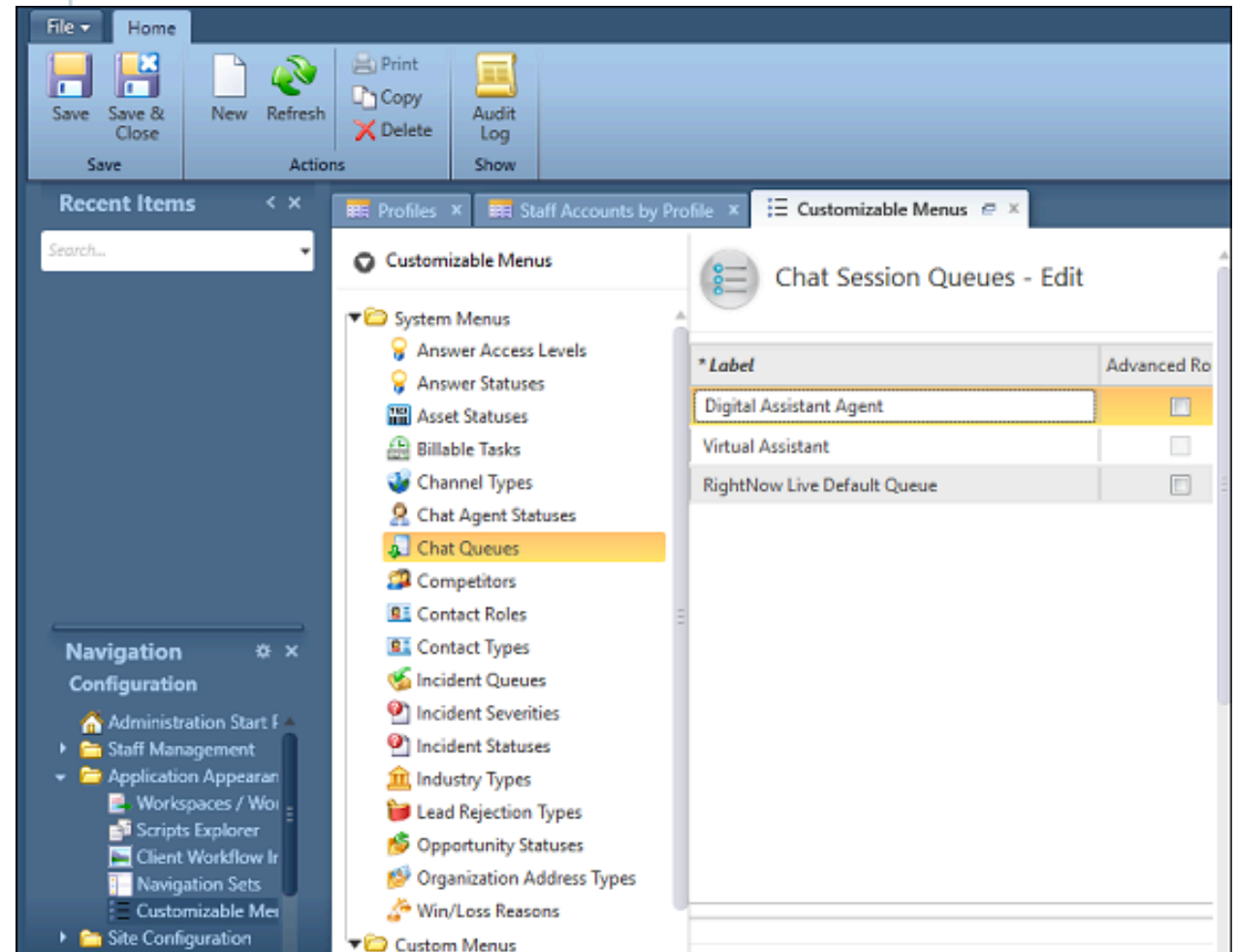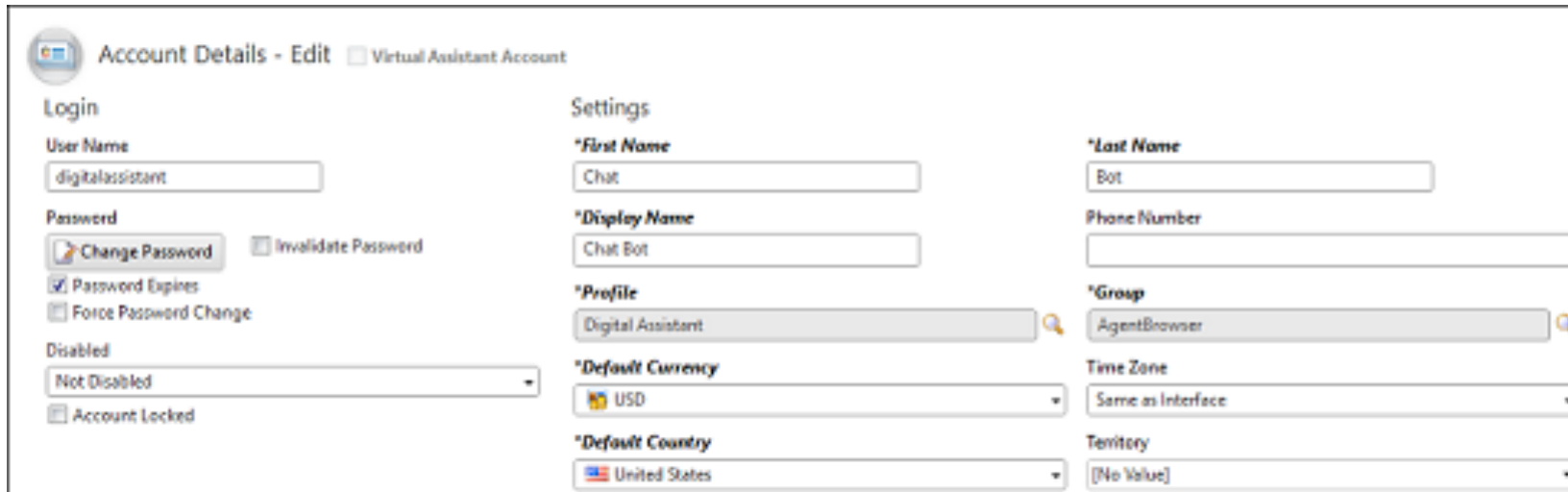
Create a DA profile

- Use profiles to manage account permissions and to assign agents to queues.

- Create a dedicated profile for the digital-assistant agent.

Assign the DA agent to the DA profile

- Create an account for the *digital-assistant* agent, and associate it with the *digital-assistant* profile.

- Chat sessions that are assigned to the DA-agent queue will be sent to the DA agent.

- Each DA as an agent needs a separate *digital-assistant* agent.

Configure a queue and profile for the escalation agents

- When the DA agent transfers (escalates) a chat session to a human agent, Oracle Service Cloud needs to know which agents to transfer the session to.

- An SvC administrator configures a queue and associates it with the appropriate profiles for the escalation agents.

Create a DA-escalation queue

- When used with chat rules and profiles, queues enable automatic sorting of incoming chats.

- Create a queue that you'll use to transfer chat sessions to an agent that's associated with a DA-escalation profile.

Create a DA-escalation profile

- Use profiles to manage account permissions and to assign agents to queues.

- Create a profile for the agents that the DA agent can transfer its chat conversations to.

Assign agents to the DA-escalation profile

- Associate the desired escalation agents with the DA-escalation profile.

Add chat rules

- Add a chat rule to define when to assign a chat session to the digital assistant.
- Add a state to handle transfers from the digital assistant to an escalation agent.
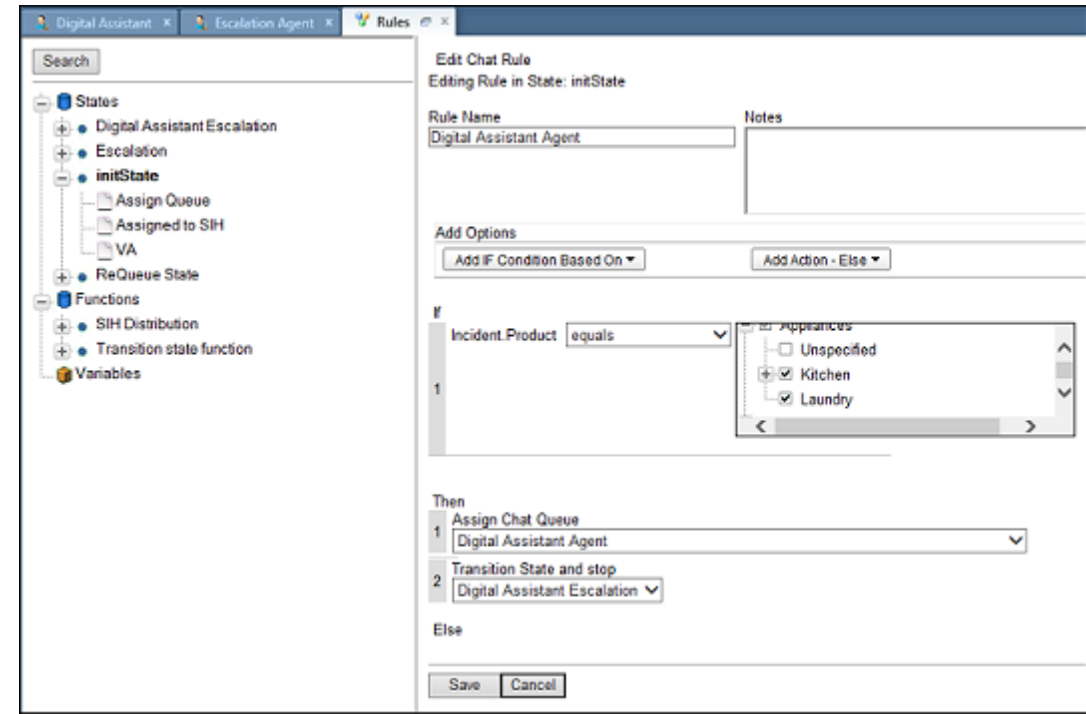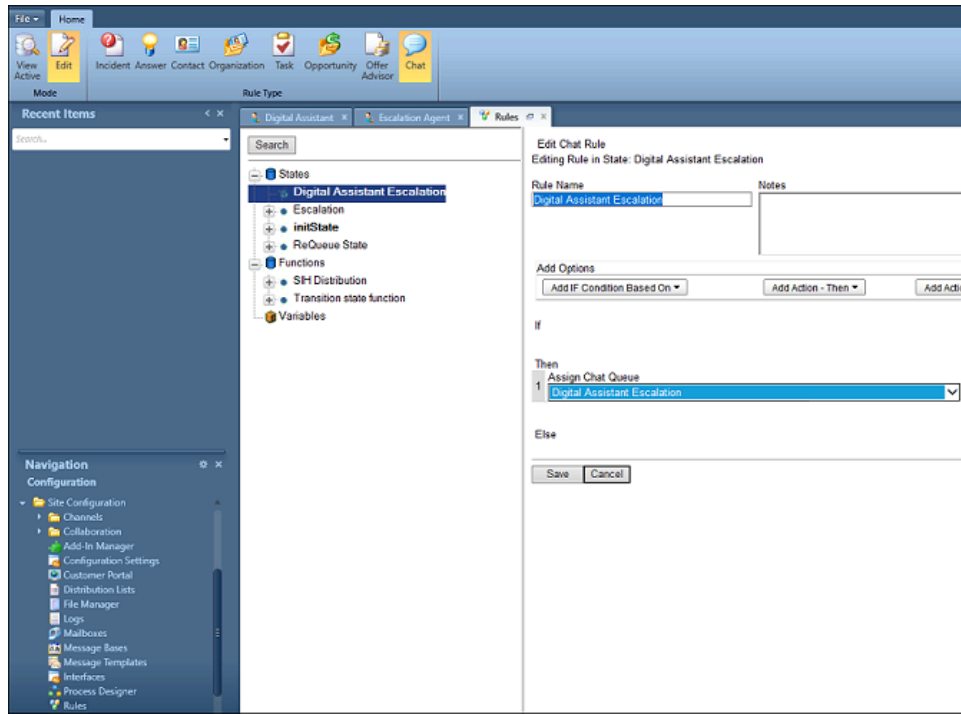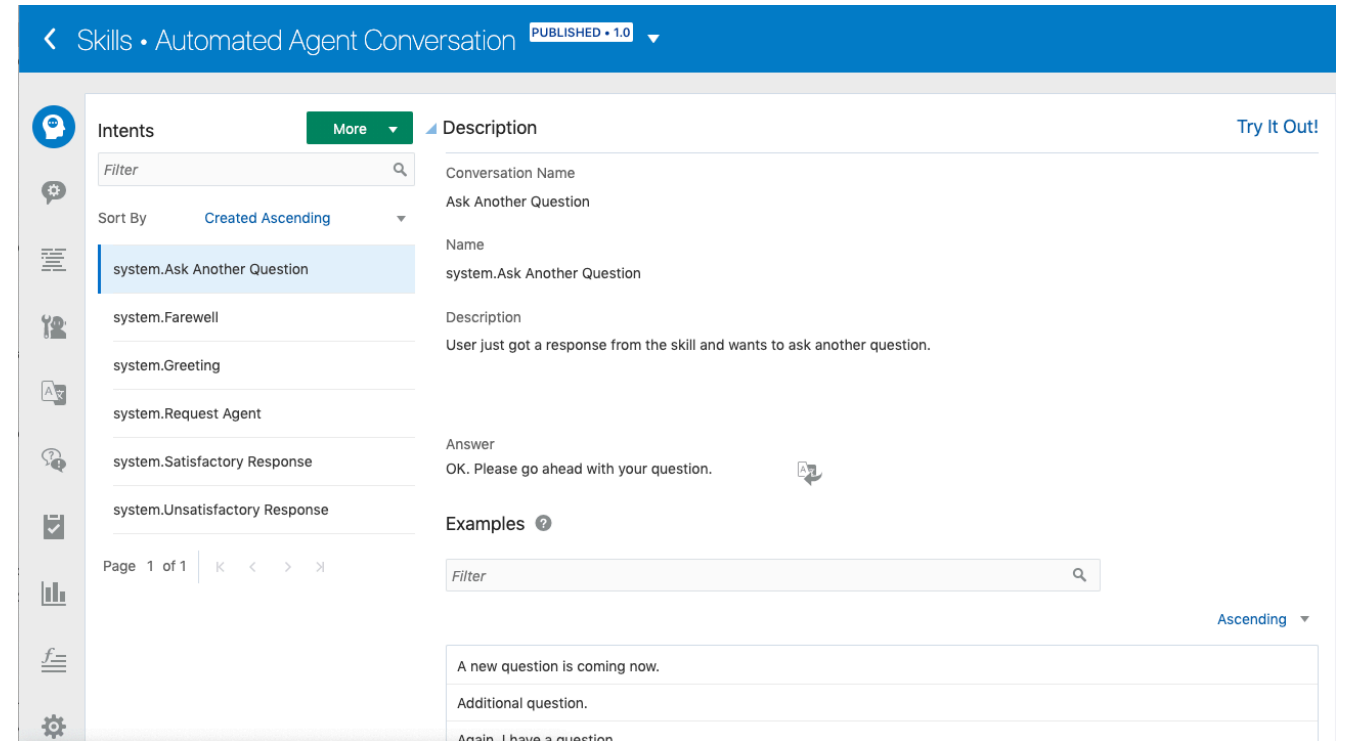
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The out of the box Service Cloud skill for Digital Assistant

The pre-built, out-of-the-box skill contains an agent transfer dialog flow and intents for:

- Starting a conversation
- Requesting an agent
- Expressing satisfaction with response
- Expressing dissatisfaction with a response
- A prelude to another question
- Exiting a conversation

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Configuring QnA – intents, answers

- For simple QnA interactions, use Q&A intents to address all your questions and answers.

- You may type answers directly in after you've trained your intents.

- Optionally, create a CSV file that contains the intents, the answers, and the different ways that people can ask the question.
  - Then import the file from the Intents page.

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Adding answers directly to intents

Intent

Answer

Intent training

Ensure that "Optimize for Answer Intents" is enabled

Skill settings

Optimize Answer

2048 characters left

Training Model
Trainer Tm

Optimize for Answer Intents

Translation Service
None

Use Translation Service to define a service.

Predominant Language

Insights
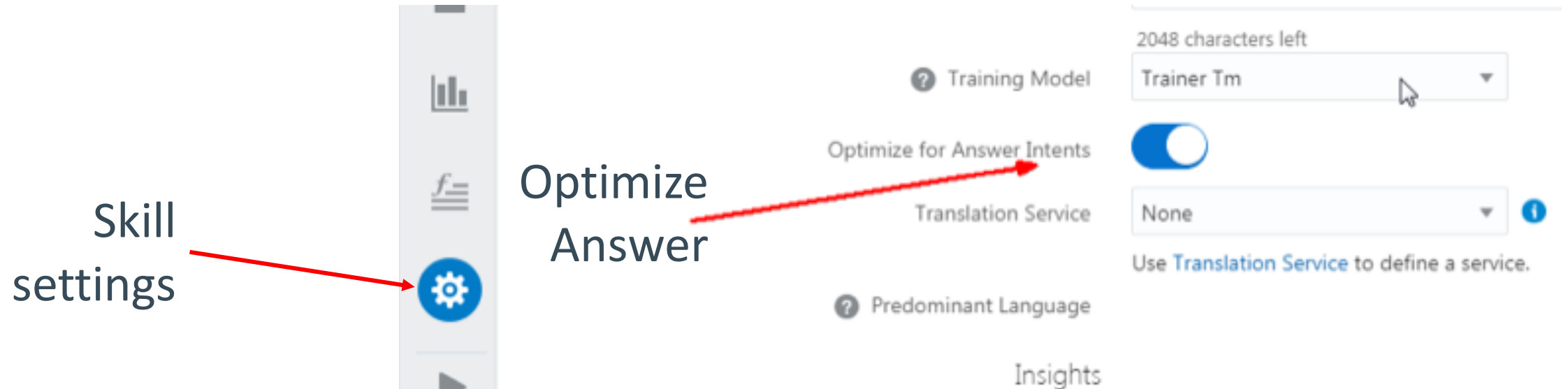
Sample import of intents, training and answers

Here's an example of a CSV file that has question intents:

```
query,topIntent,conversationName,answer
what are your hours?,StoreHours,Store Hours,"We are open from 9 to 5, seven days a week."
when are you open?,StoreHours,Store Hours,"We are open from 9 to 5, seven days a week."
when do you close?,StoreHours,Store Hours,"We are open from 9 to 5, seven days a week."
Are you open on Sunday?,StoreHours,Store Hours,"We are open from 9 to 5, seven days a week."
Do you deliver?,Delivery,Delivery Queries,We deliver purchases for amounts over $50.
Will you deliver?,Delivery,Delivery Queries,We deliver purchases for amounts over $50.
Can you deliver to my house?,Delivery,Delivery Queries,We deliver purchases for amounts over $50
Can you bring it to me?,Delivery,Delivery Queries,We deliver purchases for amounts over $50.
```
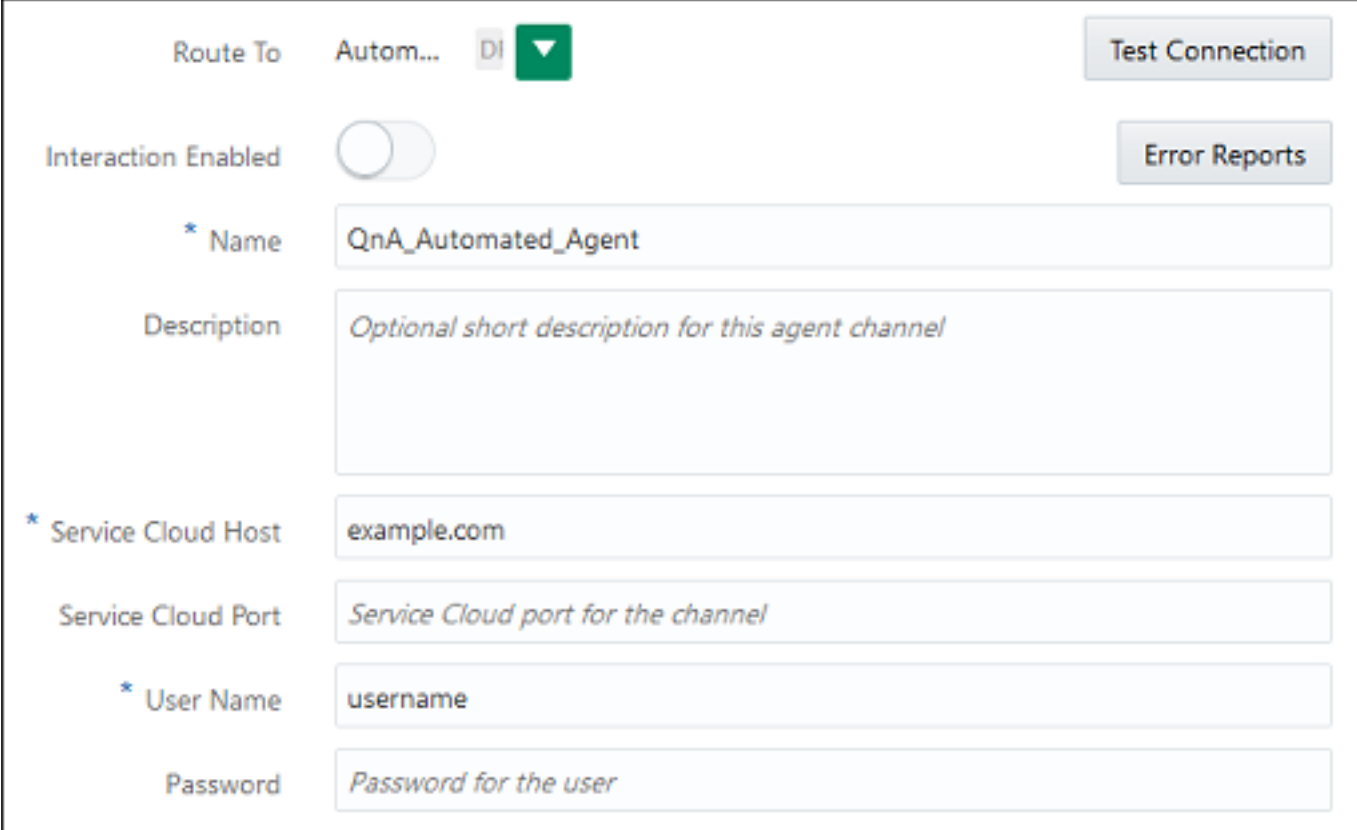
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Sign your DA into oracle service cloud

- Sign DA Service Cloud as a DA agent by creating DA as Agent channel and then enable it.

- Each DA as Agent channel must have a unique user name.

Dialog-flow limitations for oracle service cloud chat

- The responses that the DA as Agent can send to Oracle Service Cloud chat windows have these restrictions:
  - You can use text messages only.
  - The channel doesn't support postback buttons.
  - The channel doesn't support attachments.
  - The channel doesn't support location messages.
  - For the System.List component, the list is autonumbered regardless of the value of the autoNumberPostbackActions property.
  - For the System.CommonResponse component, the messages for card items display as autonumbered text.

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The out-of-the-box skill contains prebuilt YAML states for the included intents
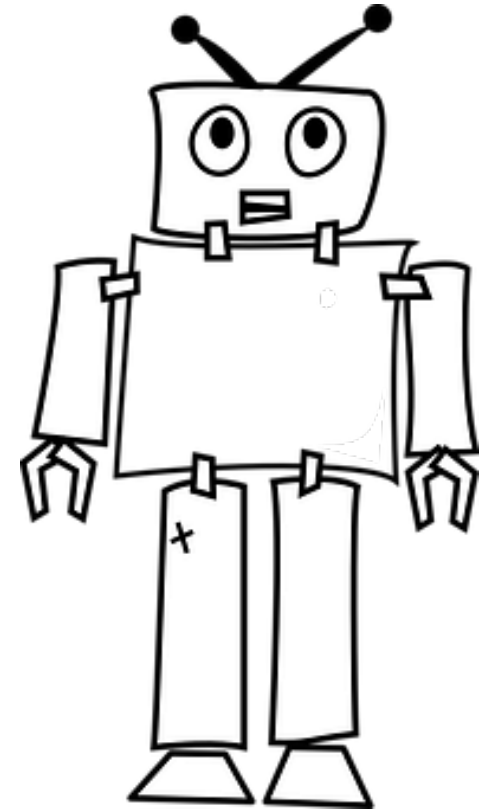
States in the pre-built ODA as an agent skill

```
#
# This state is called when an agent transfer encounters a system error. It lets the customer know they can ask for something else.
#
offerMoreHelp:
  component: "System.Output"
  properties:
    text: "You can ask me another question if there's something else that I can help you with."
  transitions:
    return: "offerMoreHelp"


#
# This state ends the conversation with a return transition for insights purposes, after the user has been transferred to another agent.
#
reset:
  component: "System.SetVariable"
  properties:
    variable: "someVariable"
    value: ""
  transitions:
    return: "reset"


#
# This state sends a greeting to the user. Settings > Digital Assistant > Welcome State and Help State can point to this state.
#
welcome:
  component: "System.Output"
  properties:
    text: "Hi, I'm an automated agent. Ask me your question and I'll try to get an answer for you. If I can't, I'll transfer you to someone who can."
  transitions:
    return: "welcome"
```

States in the pre-built ODA as an agent skill

```
states:
  #
  # Note that even though Q&A intents don't have actions, you must have a System.Intent state even if
  # you have no other types of intents. Q&A intents output the answer and restart the conversation.
  #
  intent:
    component: "System.Intent"
    properties:
      variable: "iResult"
    transitions:
      actions:
        system.Greeting: "welcome"
        system.Unsatisfactory Response: "transferToAgent"
        system.Request Agent: "transferToAgent"
        unresolvedIntent: "unresolved"


  #
  # This state tries to transfer the user to another agent when the user explicitly requests for it.
  #
  transferToAgent:
    component: "System.AgentTransfer"
    properties:
      maxWaitSeconds: "300"
      waitingMessage: "I'm transferring you to a human agent. Hold tight."
      rejectedMessage: "I wasn't able to transfer you to a human agent. Please try again later."
      errorMessage: "We're unable to transfer you to a human agent because there was a system error."
    transitions:
      actions:
        accepted: "reset"
        rejected: "handleRejected"
        error: "offerMoreHelp"
      next: "reset"
```

States in the pre-built ODA as an agent skill

```
#
# This state is called when an agent transfer is rejected. It lets the customer know they can ask for something else.
#
handleRejected:
  component: "System.Output"
  properties:
    text: "Meanwhile, let me know if there's anything else I can help you with."
  transitions:
    return: "handleRejected"


#
# This state tries to transfer the user to another agent when the intent is unresolved.
#
unresolved:
  component: "System.AgentTransfer"
  properties:
    maxWaitSeconds: "300"
    waitingMessage: "I'm not able to help you with that. Give me a second and I'll transfer you to a human agent who can help. Hold tight."
    rejectedMessage: "I'm not able to help you with that and our experts aren't available now."
    errorMessage: "We're unable to transfer you to a human agent because there was a system error."
  transitions:
    actions:
      accepted: "reset"
      rejected: "handleRejected"
      error: "offerMoreHelp"
    next: "reset"
```

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