

Quick Guide: Understanding the Syndicated Proactive Chat Widget (SPAC) with the Engagement Engine

This document is specifically for those using the Engagement Engine to deploy the Syndicated Proactive Chat widget.

This document provides helpful insight to deploying the Syndicated Proactive Chat widget with the Engagement Engine, and answers the following questions:

- *What is a Syndicated Proactive Chat widget?*
- *When should I offer Syndicated Proactive Chat on my website?*
- *Are there any requirements for deploying a Syndicated Proactive Chat?*
- *Which Rule Evaluation Cycle is best for a Syndicated Proactive Chat?*
- *Do you have any hints for configuring the Syndicated Proactive Chat options?*
- *Is there a common use case that we can reference?*
- *Where can I go for more information?*

What is a Syndicated Proactive Chat widget?

The Syndicated Proactive Chat widget (SPAC) is a chat invitation that is deployed on an external web page when defined conditions are met. Below is an example of the default proactive chat invitation that is displayed when the SPAC is triggered. The default proactive chat invitation can be replaced and/or styled to match the look and feel of the company's brand.



Companies use proactive chat in a variety of ways and most often to:



- Offer superior assistance
- Increase conversions
- Reduce abandonment

When should I offer a Syndicated Proactive Chat on my website?

Your business will determine the appropriate use of the Syndicated Proactive Chat invitation. Please reference the “*Popular Business Rules in Engagement Engine*” document found in the Oracle Service Cloud Support Portal, Answer ID 7154. This document provides a matrix that outlines business objectives and the Engagement Engine Rules that help to achieve those objectives. We’ve included instruction on how to write rules, as well as best practices and helpful tips for each type of rule.

Some common use case examples are:

- If a website visitor remains on a page for an extended length of time, then offer a proactive chat invitation
- If a cart value is over a specific amount, then offer a proactive chat invitation
- If a website visitor is completing a form and does not proceed to the next defined step, then offer a proactive chat invitation
- If a website visitor navigates their cursor to a specific zone of the page, then offer a proactive chat invitation

NOTE: Conditional chats are not aware that a proactive chat has been offered. Consider this when creating rules as not to offer an invitation when a chat is already in progress. Also, syndicated proactive chat routing is pre-determined at the time the chat invitation is presented. It is routed to a queue based upon product/category, agent availability, incident custom fields and CX chat rules.

Are there any requirements for deploying a Syndicated Proactive Chat widget?

- **Chat:** Oracle Service Cloud Chat must be enabled for your CX site
- **Engagement Engine:** The Engagement Engine Editor must be enabled for your CX site. The Syndicated Proactive Chat widget (SPAC) is deployed through the Engagement Engine when using Oracle Service Cloud Chat.
- **External Web Pages:** The SPAC is only available for use on non-Customer Portal pages, so it can be used on your company’s website. For example:
 - The SPAC widget **can** be deployed on //www.oracle.com
 - The SPAC widget *cannot* be deployed on //custhelp.oracle.com

Which Rule Evaluation Cycle is best to use with a Syndicated Proactive Chat widget?

When creating a rule that deploys a SPAC widget, the *Rule Evaluation Cycle* is a required field. This option is used to define when the rule should evaluate, and whether further rules should be processed while the current page is loaded. When deploying SPAC widgets, the intention behind the rule will drive which *Rule Evaluation Cycle* option is selected. There are a three of options to select from:

Rule Name <input type="text" value="SPAC"/> <input type="button" value="Add Note"/>	Rule Evaluation Cycle <div style="border: 1px solid blue; padding: 2px;"> - Select - <ul style="list-style-type: none"> <li style="background-color: #0070C0; color: white; padding: 2px;">- Select - <li style="background-color: #0070C0; color: white; padding: 2px;">Once every Page Load <li style="background-color: #0070C0; color: white; padding: 2px;">On Page Load <li style="background-color: #0070C0; color: white; padding: 2px;">On change of JavaScript Variable </div>
Rule Description Remaining Characters: 1024 <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	
Maximum Number of Invitations <input type="text"/>	

- Once every Page Load:** Rules with this option selected will evaluate in evaluation order when the page loads and not again until a new page loads or the current page reloads. For example, if you have a rule that triggers an invitation after the website visitor has visited a specific page (URL match), the *Rule Evaluation Cycle* should be set to *Once every Page Load*.
- On Page Load:** Rules with this option selected will evaluate in evaluation order when the page loads and again every X seconds, with an optional maximum invitations limit. Setting the *Recurrence* option specifies the interval between running each instance of the rule. For example, if you have a rule that triggers an invitation after 90 seconds on a page, the *Rule Evaluation Cycle* should be set to *On Page Load*. If using the recurrence option, it is a best practice to add a *Stop Processing Rules* event as the last action in the list. This will stop the rule from evaluating once the conditions are true. This is the recommended option because it acts as a polling mechanism since the SPAC widget doesn't have one built in like the SCCL widget.
- On Change of JavaScript Variable:** Rules with this option selected will evaluate any time a specified JavaScript variable changes. Specify which JavaScript variable to monitor in the JavaScript Variable text box. For example, if you have a rule that triggers an invitation from the JavaScript variable *cartTotal*, then the *Rule Evaluation Cycle* should be set to *On change of JavaScript Variable* in order to account for updates to the *cartTotal* while the visitor is on the webpage.

Hint: If the condition will not change while the end-user is on the page, then select "Once every Page Load" as the *Rule Evaluation Cycle*. Otherwise, select the *On Page Load* option. A timer is an example of something that is constantly changing.

- Maximum Number of Invitations:** This is the maximum number of invitations that will be displayed to a visitor as a result of this rule. This value is compared against the number of invitations displayed during the visitor's current session, and if the number of invitations displayed exceeds the maximum number for this site then no more invitations are displayed to the visitor as a result of this rule.

Do you have any hints for configuring Syndicated Proactive Chat Widget options?

There are many attributes that can be configured within the SPAC widget. We have provided a brief explanation of each attribute, as well as helpful tips.

NOTE: When passing in custom data to the SPAC widget, the *RightNow Custom Data* action must be placed before the *RightNow CX: Display Syndicated Proactive Chat* action in order for those values to be used by the widget. When setup like this, the values supplied by the *Custom Data* actions will override the corresponding values specified in the SPAC action.

- **Path to** – This is used to specify the avatar image that is used with this widget.
- **Category** – The ID of the CX *Category* to use. Only a single category may be used with chat. Category is used in conjunction with Product for chat advanced routing and reporting. Category defined here can be overridden with a custom field action in the rule.
- **Chat Login Page** – When an end-user opts to chat by clicking the chat button or link, the chat login page is displayed to the end-user. If this field is left blank the default chat login page (*/app/chat/chat_launch*) is used. If you prefer to bypass the chat login page, meaning you do not want the end-user to fill out the form and you are fine with taking anonymous chats, set this attribute to */app/chat/chat_landing*. If the chat login page is not used, after the end-user opts to chat they are immediately placed into the chat queue. The product/category defined for the widget is passed to the chat login page and used for routing.
- **Chat Login Page Height** – The height, in pixels, of the window to display. If *open_in_new_window* is set to false, setting this value has no effect. The default is 686 pixels.
- **Chat Login Page Width** – The width, in pixels, of the window to display. If *open_in_new_window* is set to false, setting this value has no effect. The default is 700 pixels.
- **Div ID** – This is a required field and is used to specify the div element that defines where you want the widget to appear on the page. If the div element specified here does not exist on the page, the Engagement Engine creates a div with the ID given here and adds it to the end of the DOM.
- **Custom Fields** – This attribute should be used if you want a default value for a custom field sent in with the chat request. JSON parsed array of custom fields is used. The array should be in the form of a key-value pair where the key is the *Custom Field ID* and the value of the custom field. Ex: {"ID1":"VALUE1","ID2":"VALUE2"}

Custom fields are defined in the CX console and *made visible for chat*. Path: *Configuration | Database | Custom Fields*. *Chat visibility* needs to be checked to become active. The following incident custom field types are available for passing information within a chat:

- Text Field
- Date Field
- Integer
- Menu
- Text Area
- Yes/No
- Date/Time

- **Custom Field Example:** You may wish to present the agent with the value of the consumers shopping cart or other information within the incident or chat pane. The Product/Category settings can also be changed using the custom field option (which will override the widget settings for these values).
- **Widget ID** – Specify a short meaningful label for the *Widget ID* field. This value will be used in the *Chat Offer Effectiveness and ROI Report* for statistics relating to this chat offer. We suggest using the EE Rule name or a shortened, meaningful version of same here.



- **Accept Button Label** – This is the text label for the *Accept* button. The default label is *Yes*.
- **Avatar Image Label** – This is used to specify the alternate text associated with the avatar image. This text is never displayed onscreen, but defined so that it can be read by screen readers to meet accessibility guidelines.
- **Header Label** – This is used to specify the text used in the header of the invitation. The default label is *Oracle RightNow CX*.
- **Logo Image Label** – This is used to specify the alternate text associated with the logo image. This text is not displayed onscreen, but defined so that it can be read by screen readers to meet accessibility guidelines.
- **Question Label** – This is used to specify the text used in the chat invitation. The default label is *A Chat Assistant is available to help. Would you like to start the session?*
- **Refusal Checkbox Label** – This is used to specify the text label for the refusal check box. The default label is *Do not ask again*.
- **Reject Button label** – This specifies the text on the refusal button. The default label is *No*.
- **Title Label** – This is used to specify the text used in the title bar. The default label is *Would you like to chat?*
- **Logo Image** – This is used to specify the logo image that is used with this widget. The default image size is 100px x 100px.

- **Minimum Sessions Available** – This option specifies the minimum number of open agent sessions that must be available in order for the link to be actionable. If this option is to be used, it must be set to a value of 1 or greater. For example, if you do not want the consumer to wait in a queue after she has accepted a proactive chat invitation, then the widget should be configured for Minimum Sessions Available. If set to 0, the trigger is disabled. *Minimum Available Sessions* will always override *Wait Threshold*. Meaning, the minimum available sessions must be met even if the current wait time is under the defined threshold.
- **Minimum Agents Available Type** – This is used to specify whether to check the *Number of Agents* or the *Number of Sessions* available before offering a chat invitation to a visitor. The *Number of Agents* would mean agents that did not have any current interactions and were available. The *Number of Sessions* references agents that can handle multiple chat sessions simultaneously, have not reached their limit of chats, and have an open “session”. A selection box is presented to select either *Agent* or *Session* availability.
- **Modal** – This is used to specify whether the widget is modal. If the widget is modal then it requires an action from the visitor in order to close the dialog and resume activity on the page. This option is either *Enabled* or *Disabled*; the default setting is *Disabled*.
- **Open in New Window** – If set to *Yes*, the page defined by *chat_login_page* will be displayed in a new window. If *No*, the current window will navigate to that page. Chat window height/width pixels specified will not be used if set to *No*. The default value is *Yes* and is Oracle’s recommendation.
- **Product** – This is used to specify the *CX Product ID* associated with this widget. Only a single product may be applied to this field. Product is used in conjunction with Category for chat advanced routing and reporting. Product defined here can be overridden with a custom field action in the rule.
- **Wait Threshold** – Specifies the maximum wait time threshold where a SPAC widget will be displayed. If the current wait time exceeds this value, the SPAC widget will not be displayed. This trigger is disabled when set to 0. The number of available sessions will always override wait threshold; the available session criteria must also be met. The default value is 40 seconds and used if no value is specified. For example, if the wait threshold is set to 40 seconds and the current wait time is 45 seconds, the SPAC will not be displayed until the current wait time is below 40 seconds and the minimum number of agent sessions is also met.

Is there a common use case that we can reference?

We have a helpful matrix that outlines business objectives and the Engagement Engine Rules that help to achieve those objectives. Please reference the “*Popular Business Rules in Engagement Engine*” document found in the Oracle Service Cloud Support Portal, Answer ID 7154.

Where do I find additional information?

For more information about the **Syndicated Proactive Chat** widget, refer to the latest Oracle Engagement Engine Cloud Service Online Documentation available here:

<http://www.oracle.com/technetwork/indexes/documentation/engagementengine-1942670.html>