

Popular Engagement Engine Rules

Companies that are new to chat are often unsure of where to place the new channel on their website. To help answer these commonly asked questions, we've gathered a comprehensive list of the most popularly deployed rules and captured them in this document.

Once your business need for chat is defined, this document is a great place to start rule selection and can be used to fast-track a chat deployment. After a predefined timeframe, results can be evaluated and rules can be optimized to best fit your company's needs. Many companies choose a few rules to begin with, rules that will gain them quick traction at the beginning of their chat deployment. Then, after their chosen timeframe, may update existing rules and expand their deployment to use new rules.

For ease of deployment, we have provided examples of the conditions used for the rules listed. That way it is simple to understand how a basic version of the rule is written, allowing for modifications and optimization over time.

Dashboard Sites **Rules** A/B Testing Settings Help

Rules > Create New Rule

Rule Name Add Note

Rule Description Remaining Characters: 1024

Maximum Number of Invitations

Rule Evaluation Cycle

Do this

Add Action

Actions

This area is used to configure the action(s) performed when the condition(s) return a True value.

Meets the following Conditions All

Add Condition

Conditions

This area is used to configure the conditions associated with a rule.

Important Assumptions:

- The reader has a general understanding of the Engagement Engine and how it works
- The proper Engagement Engine Code is placed on the appropriate web pages
- A DIV tag with a unique ID, used to insert Syndicated Chat Widgets, already exists on the pages where rules will be deployed
- For Business Requirement and Data Collection rules, the appropriate JavaScript Variables exist on the web pages
- The ACTIONS for all rules include:
 - Deploying a Syndicated Chat widget
 - An event to stop processing the current rule. To stop processing rules is a best practice for all proactive rules listed in this document¹
- **Testing on a test site occurs prior to placing any rule in production²**



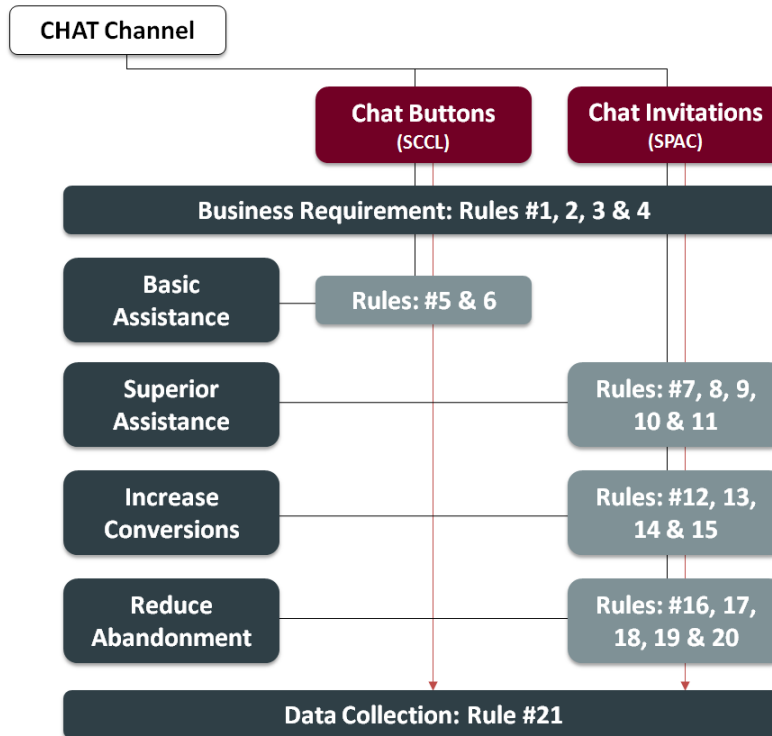
Note

The Engagement Engine can also be used to trigger Click-to-Call invitations. Oracle Click-to-Call Cloud Service turns a traditional telephony service into a smart interactive voice experience. Click-to-Call capabilities deliver fast, personal, interactive voice assistance to the right online customers, right when they need it. For more information, please contact your Oracle Representative.

¹ Syndicated Proactive Chat invitations are triggered by using Rules #5-20.

² Each rule, no matter the widget used, should be tested on a test site before publishing to a production site. Often, testing rules is easiest when you add a single condition at a time. For example, you are writing a rule that triggers on a specific page after a specific time. First, add the page condition then test the rule. Next, add the time condition then test the rule.

The following matrix helps to define how and when you might offer chat as a communication channel, based on business need. Chat can be deployed through the Syndicated Conditional Chat Link widget (SCCL); essentially these are chat buttons or links that appear throughout a website. Chat can also be deployed through the Syndicated Proactive Chat widget (SPAC), where conditions are used to trigger chat invitations. Here, we've organized the most popular chat rules by widget type offered and business need.





Business Requirement Rules should appear first, in the order of rules. These rules are designed to gather information that is required by the Business and are not specific to the SCCL widget or the SPAC widget. The order in which the Engagement Engine triggers rules is based on Rule Evaluation Order. The rule with the lowest Evaluation Order value is evaluated first, followed by the rule with the next lowest Evaluation Order value, and so on. The order in which the rules appear in the Engagement Engine editor should reflect evaluation order, which is why we suggest placing these Business Requirement Rules at the top of the list. Please see Appendix A for more information on how Queue Routing Rules work with Data Collection Rules.

BUSINESS REQUIREMENT RULES		
Reference#	Rule Name	Rule Concept
# 1	1.1 - Queue Routing	A company wants to route chats to a specific queue based on information collected from the browser session. <i>Please see Appendix A for more about Queue Routing Rules.</i>
# 2	1.2 - Conversion Tracking	A company wants to know how chat is affecting the bottom-line
# 3	1.3 - Third-Party Analytics	A company wants to know how chat is affecting the bottom-line. Please note: This is an advanced rule and is discussed at a high-level in this document
# 4	1.4 - PagePeek	An agent productivity tool

If Basic Assistance Rules will be deployed, these should be listed next. These might be rules that deploy a chat button (SCCL) throughout your website. For example, if you want an end-user to have access to chat when they are on a Contact Us page, this type of rule would be used.

GENERAL ASSISTANCE RULES		
Reference#	Rule Name	Rule Concept
# 5	2.1 - Header	If agents are available, offer a Live Chat link/button in the header of my website
# 6	2.2 - Contact Us Pages	If agents are available, offer a Live Chat link/button on the contact us pages of my website

For more advanced Assistance Rules, you might deploy Superior Assistance Rules. These should be ordered after Basic Assistance Rules. Superior Assistance Rules are for more complex situations like when an end-user receives an error on the page.


SUPERIOR ASSISTANCE RULES		
Reference#	Rule Name	Rule Concept
# 7	2.3 - Out of Process	The end-user was previously on X page, but is currently not on the X page, then offer chat
# 8	2.4 - No Search Results	The end-user searches in the search tool for an item and it returns unavailable X times, then offer chat
# 9	2.5 - Multi-Search	The end-user searches in the search tool multiple times, then offer chat
# 10	2.6 - Error Message	The end-user receives an error message on a page, then offer chat
# 11	2.7 - Error Page	The end-user receives an error page, then offer chat

If you are looking to Increase Conversions through the use of chat, the following rules are related to high value products and cart values. These rules generally deploy a chat invitation (SPAC) that contains a message specific to the context of the page. For example, if an end-user is on a product page for cookware that is \$499 or greater, then the messaging on the invitation may say, “Have a question about cookware? We’re here to help!”

INCREASE CONVERSIONS		
Reference#	Rule Name	Rule Concept
# 12	3.1 - High Value Cart Total	The end-user has over \$X,XXX.XX in her cart, then offer a chat
# 13	3.2 - High Value Product Page	The end-user is on a product page and the product has a value greater than \$X,XXX.XX, then offer a chat
# 14	3.3 - Search Engine Referral	The end-user comes to the website from a search engine result, then offer a chat
# 15	3.4 - Form Field Interaction	The end-user is completing a form, then offer a chat

Reducing abandonment can be done in a variety of ways. Several of the rules listed here can be applied to your specific business objectives by simply updating the Page URL Value. Abandonment rules are a simple, yet effective way to communicate with your customers in their time of need. Like conversion rules, abandonment rules generally deploy a chat invitation (SPAC) that contains a message specific to the context of the page. For example, if an end-user is on a checkout page and receives an error when entering a promotion code, the messaging on the invitation may say, “Issues with a Promo Code? We’re here to help!”

REDUCE ABANDONMENT		
Reference#	Rule Name	Rule Concept
# 16	4.1 - Any Page/Time On Site	The end-user has been on the site for XX seconds, then offer chat
# 17	4.2 - Any Page/Time On Page	The end-user is on X page for XX seconds, then offer chat
# 18	4.3 - Multi-Page in Category/Time On Site	The end-user is browsing a specific section of the website and has visited X number of product pages within a defined category, then offer chat after X seconds on the site
# 19	4.4 - Mouse Out	The end-user mouses away from the body of the X page by navigating into the browser area, then offer chat
# 20	4.5 - Remove Item(s)	The end-user removes X from the X page, then offer chat

 **Note** If there are multiple chat offers on one page and tracking the Widget Name or ID is needed for agents within the session or analytics, then consider adding an additional JavaScript Variable to the Widget Rule. For example, if a Syndicated Conditional Chat Link and a Syndicated Proactive Chat invitation appear on the same page, it may be required by the business to track which chat option was selected by the end-user. This modification can be made to any of the Rules 5-20 in this document:

Rule Name Display SCCL Add Note Rule Description Remaining Characters: 968 No conditions, displays Syndicated Conditional Chat Link Maximum Number of Invitations <input type="text"/>	Rule Evaluation Cycle Once every Page Load
--	--

Do this									
Add Action	<div style="border: 1px solid gray; padding: 5px;"> RightNow CX: Display Syndicated Conditional Chat </div> <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> RightNow Custom Data: Populate from JavaScript Variable <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Custom Data Field *</td> <td>None</td> </tr> <tr> <td>RightNow Custom Data Field</td> <td>Custom Data Field</td> </tr> <tr> <td>RightNow Custom Data Field ID *</td> <td>3</td> </tr> <tr> <td>JavaScript Variable *</td> <td>WidgetID</td> </tr> </table> </div>	Custom Data Field *	None	RightNow Custom Data Field	Custom Data Field	RightNow Custom Data Field ID *	3	JavaScript Variable *	WidgetID
Custom Data Field *	None								
RightNow Custom Data Field	Custom Data Field								
RightNow Custom Data Field ID *	3								
JavaScript Variable *	WidgetID								


Data Collection Rules should be the last rule in the order of rules; within the Engagement Engine editor dashboard, the Data Collection rule would be the last rule in the list of production rules, before any test rules. These rules are designed to gather information from the end-user’s browser session that is not required for Queue Routing. Please see Appendix A for more information on how Queue Routing Rules work with Data Collection Rules.

DATA COLLECTION RULES

Reference#	Rule Name	Rule Concept
# 21	5.1 - Data Collection	A company wants to collect 'known' information about the authenticated end-user and pass it to the chat session, so the end-user does not need to supply the information in a pre-chat form. <i>Please see Appendix A for more about Data Collection Rules.</i>

1. Queue Routing Rules

The Queue Routing rule collects data used to deliver chats to the proper queue of agents. The first rule in the sequence of all Engagement Engine rules should be those used for queue routing, otherwise the chats will route to the default queue instead of the desired queue. For the Queue Routing rule to function the proper JavaScript Variables must exist in the source code of your website. Please see Appendix A for more information on how Queue Routing Rules work with Data Collection Rules.

 **Note** The data collected in the Queue Routing rule is not unique to the end-user. For example, do not collect 'email address' within this rule. Instead, collect data like Product or Category; essential data points used to route chats to the proper queue should be included in this rule.

In this example, we are collecting the Language and the Line of Business from the source code on the webpage. This rule can only be effective if there is a reliable and consistently available JavaScript Variable on the pages where chat is launched.

Rule Name
1.1 - Queue Routing Add Note

Rule Description
Collect this data to route chats Remaining Characters: 992

Rule Evaluation Cycle
Once every Page Load

Maximum Number of Invitations


Do this

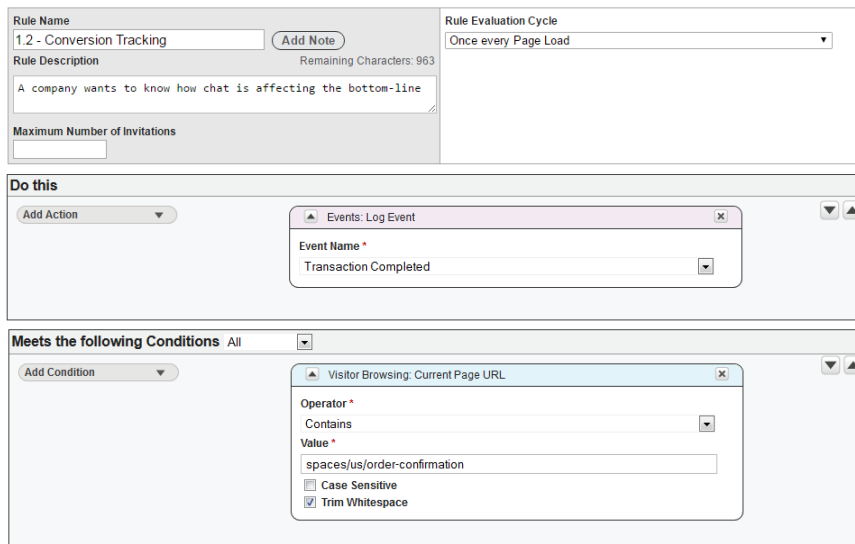
Add Action ▼

- RightNow Custom Data: Populate from JavaScript Variable**
 - Custom Data Field *
None
 - RightNow Custom Data Field
Custom Data Field
 - RightNow Custom Data Field ID *
1
 - JavaScript Variable *
siteLanguage
- RightNow Custom Data: Populate from JavaScript Variable**
 - Custom Data Field *
None
 - RightNow Custom Data Field
Custom Data Field
 - RightNow Custom Data Field ID *
2
 - JavaScript Variable *
siteLineOfBusiness

2. Conversion Tracking Rule

This rule is used when a company would like to understand how chat sessions convert.

 **Note** The URL Value comes directly from your website, so it is important to choose a value that makes sense to your company's website and the most common click-path of your website visitors. In this example, ABC Company considers the 'order confirmation' page a conversion, so we use that as the 'transaction complete' indicator in our example. Your conversion page will be specific to your company's website.



The screenshot shows the Oracle rule configuration interface. At the top, the 'Rule Name' is '1.2 - Conversion Tracking' and the 'Rule Evaluation Cycle' is 'Once every Page Load'. The 'Rule Description' is 'A company wants to know how chat is affecting the bottom-line'. Below this, there is a section 'Do this' with one action: 'Events: Log Event' with the 'Event Name' set to 'Transaction Completed'. At the bottom, there is a section 'Meets the following Conditions' with one condition: 'Visitor Browsing: Current Page URL' with the 'Operator' set to 'Contains' and the 'Value' set to 'spaces/us/order-confirmation'. There are also checkboxes for 'Case Sensitive' (unchecked) and 'Trim Whitespace' (checked).

3. Third-Party Analytics Rule

If your company uses a third-party analytics tool to track conversions, consider integrating chat events into your existing reports. For integration with third-party website analytics tool, please contact Oracle Consulting.

4. PagePeek Rule

PagePeek is an agent productivity tool that allows the agent to see the page where an end-user launched the chat. By creating a PagePeek rule, this feature is enabled.

The screenshot shows a configuration form for a PagePeek rule. It is divided into two main sections. The top section contains: 'Rule Name' with the value '1.4 - PagePeek' and an 'Add Note' button; 'Rule Description' with the text 'An agent productivity tool' and a 'Remaining Characters: 998' indicator; and 'Maximum Number of Invitations' with an empty input field. The right side of the top section has 'Rule Evaluation Cycle' set to 'Once every Page Load'. The bottom section, titled 'Do this', contains an 'Add Action' dropdown and a single action card: 'On Demand: Enable PagePeek'. A tooltip for this action reads: 'This action marks the page as available for PagePeek'.


5. Header Rule

This rule is designed to offer a chat button in the header of your company’s website.

Another popular variation of this rule is the Footer equivalent. For example, instead of offering a chat button in the header offer it in the footer of your company’s website.

Regardless of the position, name the rule appropriately – if the chat button appears in the header, name the rule with the Header designation. If the rule displays chat in the footer, name the rule with the Footer designation.

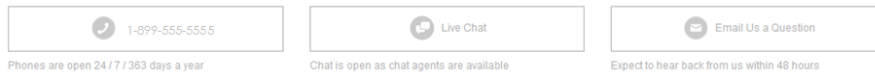
This is perhaps the easiest rule to write, because if you choose to offer a chat button in the header of all of your web pages, then you do not need any conditions on this rule. The URL is defined within the Site condition, so you simply need to invoke the Syndicated Conditional Chat Link (SCCL) widget and do not need conditions.

 **Note** To show the syndicated conditional chat link (SCCL) on specific web pages, you will need a condition with a URL Value. The URL Value comes directly from your website.

Rule Name 2.1 - Header Add Note	Rule Evaluation Cycle Once every Page Load
Rule Description Remaining Characters: 971 If agents are available, offer the SCCL in the header	
Maximum Number of Invitations	
Do this	
Add Action RightNow CX: Display Syndicated Conditional Chat	

6. Contact Us Pages Rule

This rule is designed to offer a chat button on the contact us pages of your company’s website.



Popular variations of this rule include Product Pages and Buy Flow Pages. For example, you may want a chat button to appear on product pages, next to a sizing chat, to easily help customers when they have questions about measurements. Or, to assist within the cart and check out process, you might have a chat button in the right side-bar of the page to have assistance at the ready. These rule variations are easy to do, simply by updating the Page URL Value.

And, regardless of the position, name this rule and all variations appropriately.

Note The URL Value comes directly from your website, so it is important to choose a value that is consistent and universal.

Rule Name 2.2 - Contact Us Pages Add Note	Rule Evaluation Cycle Once every Page Load
Rule Description Remaining Characters: 951 If agents are available, offer SCCL on the contact us pages of my website	
Maximum Number of Invitations	
Do this	
Add Action RightNow CX: Display Syndicated Conditional Chat	

Meets the following Conditions All

Add Condition

Visitor Browsing: Current Page URL

Operator *

Matches regular expression


Regular Expression *

\contact-us\.html

Trim Whitespace

7. Out of Process Rule

The example listed here for this rules is designed to offer a proactive chat invitation to an end-user, when the end-user was previously in the cart and is not currently in the checkout process. See note:

 **Note** For an Out of Process Rule, it is important to ensure the logical click-path to purchase is represented in the Value fields of the conditions. The URL Value for each condition comes directly from your website. For example, if it is logical for a customer to be in the cart then move to checkout, use that flow in the Value fields. Values will be URLs from your website that represents the cart->checkout process. When in the cart, if your customers tend to 'continue shopping', then choose a very specific URL to avoid over-inviting customers.

Rule Name: 2.3 - OoP: Cart>Checkout Add Note

Rule Evaluation Cycle: Once every Page Load

Rule Description: The EU was previously on a Cart page, but is currently not on a Checkout page, then offer: ~~3888~~

Maximum Number of Invitations:

Do this

Add Action

RightNow CX: Display Syndicated Proactive Chat

Events: Processing Rules

Stop Processing Rules *

Current Rule

Meets the following Conditions All

Add Condition

Visitor Browsing: Current Page URL

Operator *
Does not contain

Value *
spaces/us/checkout

Case Sensitive
 Trim Whitespace

Visitor Browsing: Previous Page URL


Operator *
Contains

Value *
spaces/us/cart

Case Sensitive
 Trim Whitespace

8. No Search Results Rule

This rule is designed to offer a proactive chat invitation to an end-user, when the end-user searches in the search tool for an item or knowledgebase answer and it returns unavailable. In our example below, the end-user has searched a few times and received no results each time, so then a chat invitation is offered.

 **Note** For the No Search Results Rule you need a Current Page URL and to understand the content of your website for the JavaScript Variable. The URL Value for the condition comes directly from your website. The JavaScript Variable comes directly from the source code of your website. To understand how this rule can apply to your website, please check with your internal development team (those who create and maintain your company’s website). It is best to have a very clear and specific variable for this rule; otherwise you run the risk of over-offering the Syndicated Proactive Chat widget.

Rule Name: 2.4 - No Search Results Add Note

Rule Description: If the EU receives an unsuccessful search, offer SPAC Remaining Characters: 971

Maximum Number of Invitations:

Rule Evaluation Cycle: On Page Load

Recurrence: 3 Seconds

Rule Evaluation Maximum Limit:

Do this

Add Action

RightNow CX: Display Syndicated Proactive Chat

Events: Processing Rules

Stop Processing Rules *
Current Rule

Meets the following Conditions All

Add Condition

Visitor Browsing: Current Page URL

Operator *
Contains

Value *
/search

Case Sensitive
 Trim Whitespace

Web Page Content: JavaScript Variable

Variable Type *
Text

Variable Name *
div class="content"

Operator *
Contains

Value
no results

Case Sensitive
 Trim Whitespace

9. Multi-Search Rule

This rule is designed to offer a proactive chat invitation to an end-user, who most certainly needs assistance because she isn't finding the desired results as measured by the consecutive multiple attempts in the search tool, regardless of whether results returned. In this example, the end-user has searched five times in a row, so then a chat invitation is offered.

Rule Name
2.5 - Multi-Search Add Note

Rule Description Remaining Characters: 960
If the EU searches in the search tool multiple times, offer SRAC

Maximum Number of Invitations

Rule Evaluation Cycle
On Page Load

Recurrence
3 Seconds

Rule Evaluation Maximum Limit

Do this

Add Action

RightNow CX: Display Syndicated Proactive Chat

Events: Processing Rules

Stop Processing Rules *

Current Rule

Meets the following Conditions All

Add Condition

Visitor Browsing: Page URL History Count

Operator *
Greater than or equal to

Number of Page Visits *
5

Specify URL

URL Operator *
Contains


URL Value
/search

Case Sensitive
 Trim Whitespace

10. Error Message Rule

This rule is designed to offer a proactive chat invitation to an end-user, when the end-user receives an error message on a page.

In our example, we are offering chat to anyone on the website that receives an error message, so we are not including a Visitor Browsing: Current Page URL condition in this rule. That way the rule applies to the entire site, and not just one specific page or subset of pages. If you'd like to narrow the scope of this rule, feel free to add the Visitor Browsing: Current Page URL condition to your version of the rule.

 **Note** The JavaScript Variable comes directly from the source code of your website. To understand how this rule can apply to your website, please check with your internal development team (those who create and maintain your company's website). It is best to have a very clear and specific variable for this rule; otherwise you run the risk of over-offering the Syndicated Proactive Chat widget.


The screenshot shows a configuration interface for a rule. It is divided into three main sections:

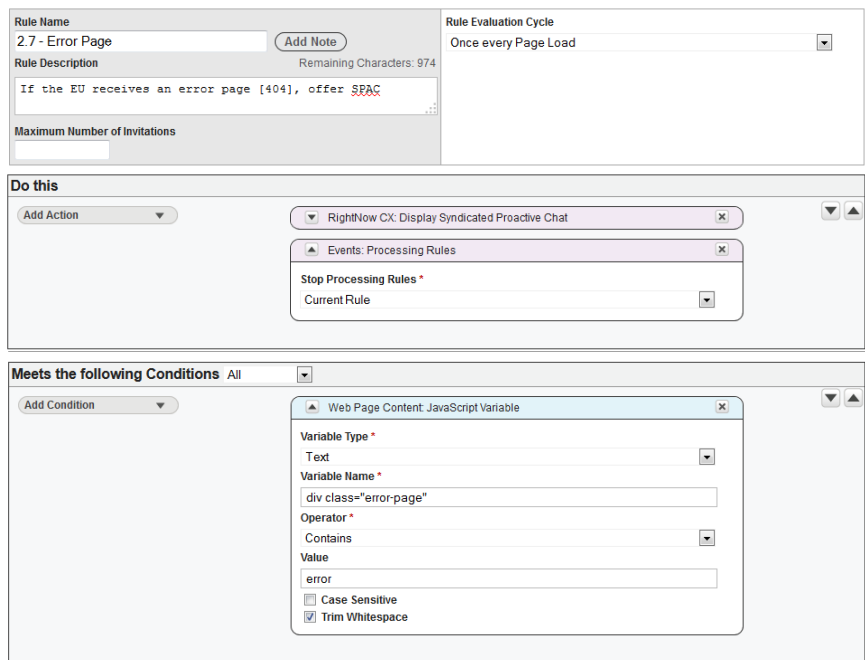
- Rule Name:** 2.5 - Error Message. There is an "Add Note" button and a character count of "Remaining Characters: 977".
- Rule Description:** If the EU receives an error message, offer SPAC.
- Rule Evaluation Cycle:** On Page Load.
- Recurrence:** 1 Seconds.
- Rule Evaluation Maximum Limit:** (empty field).
- Do this:** A dropdown menu shows "RightNow CX: Display Syndicated Proactive Chat". Below it, an "Events: Processing Rules" section is expanded, showing "Stop Processing Rules" and "Current Rule" (set to "Current Rule").
- Meets the following Conditions:** A dropdown menu shows "Web Page Content: JavaScript Variable". The condition details are:
 - Variable Type: Text
 - Variable Name: div class="error-message"
 - Operator: Contains
 - Value: error
 - Case Sensitive:
 - Trim Whitespace:

11. Error Page Rule

This rule is designed to offer a proactive chat invitation to an end-user, when the end-user receives an error page.

In our example, we are offering chat to anyone on the website that receives a 404 error. Because we want this rule to apply across the entire website, we are not including a Visitor Browsing: Current Page URL condition in this rule.

 **Note** The JavaScript Variable comes directly from the source code of your website. To understand how this rule can apply to your website, please check with your internal development team (those who create and maintain your company's website). It is best to have a very clear and specific variable for this rule; otherwise you run the risk of over-offering the Syndicated Proactive Chat widget.




The screenshot shows the configuration interface for a rule named "2.7 - Error Page".

- Rule Name:** 2.7 - Error Page
- Rule Evaluation Cycle:** Once every Page Load
- Rule Description:** If the EU receives an error page [404], offer ~~SPAC~~ *SPAC*
- Maximum Number of Invitations:** (empty field)
- Do this:** RightNow CX: Display Syndicated Proactive Chat
- Meets the following Conditions:** Web Page Content: JavaScript Variable
 - Variable Type:** Text
 - Variable Name:** div class="error-page"
 - Operator:** Contains
 - Value:** error
 - Case Sensitive
 - Trim Whitespace

12. High Value Cart Total Rule

This rule is designed to offer a proactive chat invitation to an end-user, when the end-user has over a specific dollar amount in the cart. In this example, we are offering chat to anyone on the cart page, where the cart value (Sub-Total) is greater than or equal to 499.

For this rule to be effective there needs to be an existing form field or JavaScript variable in the source code of the page. We also suggest adding this JavaScript value to your Data Collection rule (Rule #1 in this document), so Chat Agents are able to see the value within their Chat Workspace.

 **Note** For this rule you need a Current Page URL and to understand the content of your website for the JavaScript Variable. The URL Value for the condition comes directly from your website. The JavaScript Variable comes from the source code of your website. To understand how this rule can apply to your website, please check with your internal development team (those who create and maintain your company's website). They will know if a JavaScript Variable for Cart Value already exists or if another variable can be used. It is best to have a very clear and specific variable for this rule; otherwise you run the risk of over-offering the Syndicated Proactive Chat widget or not having it show at all.


The screenshot displays the configuration interface for a rule. It is divided into several sections:

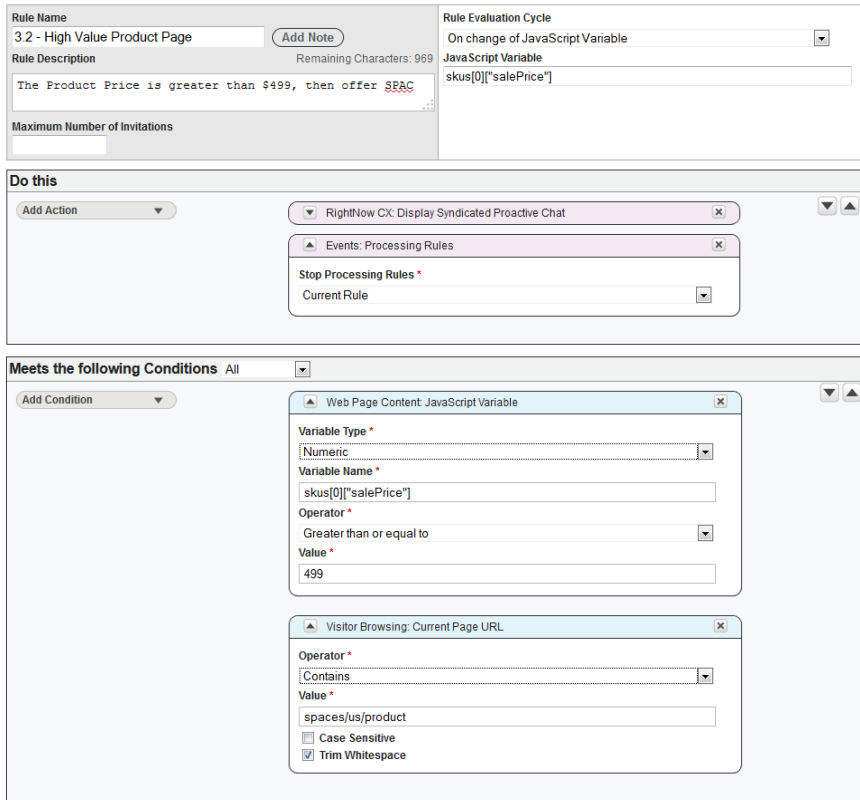
- Rule Name:** 3.1 - High Value Cart Total. Includes an "Add Note" button and a character count of 957.
- Rule Description:** The Cart Subtotal is greater than or equal to \$499, then offer SPAC.
- Maximum Number of Invitations:** An empty input field.
- Rule Evaluation Cycle:** On change of JavaScript Variable.
- JavaScript Variable:** subTotal.
- Do this:** Includes an "Add Action" dropdown and a selected action: "RightNow CX: Display Syndicated Proactive Chat". It also shows "Events: Processing Rules" with "Stop Processing Rules" set to "Current Rule".
- Meets the following Conditions:** Set to "All". It includes two conditions:
 - Web Page Content: JavaScript Variable:** Variable Type is "Numeric", Variable Name is "subTotal", Operator is "Greater than or equal to", and Value is "499".
 - Visitor Browsing: Current Page URL:** Operator is "Contains", Value is "spaces/us/cart", and checkboxes for "Case Sensitive" and "Trim Whitespace" are present.

13. High Value Product Page Rule

This rule is designed to offer a proactive chat invitation to an end-user, when the end-user is on a product page and the product has a value greater than a specific value. In this example, we are offering chat to anyone on a product page, where the product value (Sale Price) is greater than or equal to 499.

For this rule to be effective there needs to be an existing form field or JavaScript variable in the source code of the page. We also suggest adding this JavaScript value to your Data Collection rule (Rule #1 in this document), so Chat Agents are able to see the value within their Chat Workspace.

 **Note** For this rule you need a Current Page URL and to understand the content of your website for the JavaScript Variable. The URL Value for the condition comes directly from your website. The JavaScript Variable comes from the source code of your website. To understand how this rule can apply to your website, please check with your internal development team (those who create and maintain your company’s website). They will know if a JavaScript Variable for Cart Value already exists or if another variable can be used. It is best to have a very clear and specific variable for this rule; otherwise you run the risk of over-offering the Syndicated Proactive Chat widget or not having it show at all.



The screenshot shows the configuration interface for a rule named "3.2 - High Value Product Page".

- Rule Name:** 3.2 - High Value Product Page
- Rule Description:** The Product Price is greater than \$499, then offer SPAC
- Maximum Number of Invitations:** (empty field)
- Rule Evaluation Cycle:** On change of JavaScript Variable
- JavaScript Variable:** skus[0]["salePrice"]

Do this

- Action: RightNow CX: Display Syndicated Proactive Chat
- Stop Processing Rules: Current Rule

Meets the following Conditions All

- Condition 1: Web Page Content: JavaScript Variable
 - Variable Type: Numeric
 - Variable Name: skus[0]["salePrice"]
 - Operator: Greater than or equal to
 - Value: 499
- Condition 2: Visitor Browsing: Current Page URL
 - Operator: Contains
 - Value: spaces/us/product
 - Case Sensitive:
 - Trim Whitespace:

14. Search Engine Referral Rule

This rule is designed to offer a proactive chat invitation to an end-user, when the end-user has performed a search on a Search Engine and then visits your company’s website.

In this example, the end-user performed a Google Search for the term “lamps.” When the end-user lands on the Lamps Directory page, a specific Syndicated Proactive Chat invitation is offered with the message, “Looking for a lamp? We’re here to help!”

The screenshot displays the Oracle Rule Configuration interface for a rule named "3.3 - Search Engine Results".

- Rule Name:** 3.3 - Search Engine Results (with an "Add Note" button).
- Rule Description:** If the EU performs a search engine search for LAMP(S), then visits our website, offer SPAC. (Remaining Characters: 934).
- Rule Evaluation Cycle:** Once every Page Load.
- Maximum Number of Invitations:** (Empty input field).
- Do this:** RightNow CX: Display Syndicated Proactive Chat. Includes a sub-section for "Events: Processing Rules" with "Stop Processing Rules" and "Current Rule" dropdowns.
- Meets the following Conditions:** All. Includes two conditions:
 - Visitor Browsing: Search Engine:** Comparison Method: Search engine; Operator: Contains; Search Engine Name: google; Case Sensitive: unchecked; Trim Whitespace: checked.
 - Visitor Browsing: Previous Page URL:** Operator: Contains; Value: lamp; Case Sensitive: unchecked; Trim Whitespace: checked.

15. Form Field Interaction Rule

This rule is designed to offer a proactive chat invitation to an end-user, when the end-user selects a specific option from the web page. This rule can be used to trigger an invitation based on the value of the field, or an interaction with the field. This rule is typically used with radio buttons and checkboxes.


In this example, the end-user is shopping for a specific smart phone and selects the 16GB option, then offer a Syndicated Proactive Chat invitation.

The screenshot displays the Oracle CX Cloud Rule Configuration interface, organized into three main sections:

- Rule Name:** 3.4 - Form Field Content. Includes an "Add Note" button and a character count of 984.
- Rule Description:** A text area containing the rule logic: "If the EU downgrades to 16GB, offer ~~SRAC~~".
- Rule Evaluation Cycle:** Set to "Once every Page Load".
- Do this:** The "Add Action" dropdown is set to "RightNow CX: Display Syndicated Proactive Chat". Below it, a "Stop Processing Rules" section is visible, with "Current Rule" set to the active rule.
- Meets the following Conditions:** Set to "All". It contains two conditions:
 - Visitor Interaction: Mouse Click on Page Element:** Element ID is set to "memory_element16GB". Operator is "Equal to". "Trim Whitespace" is checked.
 - Visitor Browsing: Current Page URL:** Operator is "Contains". Value is "/app/shop/mobile-iPhone5s". "Trim Whitespace" is checked.

16. Any Page/Time On Site Rule


This rule is designed to offer a proactive chat invitation to an end-user, after the end-user has been on the site for a specific amount of time.


 **Note** Using known website information is a great place to start when initially choosing the value for Time on Site. Most organizations utilize Website Analytics on their website. Website Analytics may provide you a minimum, maximum or average time on site before an end-user converts or abandons. If using a Time on Site rule, the average time on site provided from your Website Analytics is an ideal value to begin with. Then you can measure the results to determine if a change needs to be made. Try, measure, try, measure, try...

Rule Name 4.1 - Site/7mins Add Note	Rule Evaluation Cycle On Page Load	
Rule Description The EU has been on the site for 7mins, then offer SPAC <small>Remaining Characters: 970</small>	Recurrence 5 Seconds	
Maximum Number of Invitations <input type="text"/>	Rule Evaluation Maximum Limit <input type="text"/>	
Do this		
Add Action RightNow CX: Display Syndicated Proactive Chat		
Events: Processing Rules		
Stop Processing Rules * Current Rule		
Meets the following Conditions All		
Add Condition Date / Time: Time on Site		
Operator * Greater than		
Time *		
Hours *	Minutes *	Seconds *
00	7	00

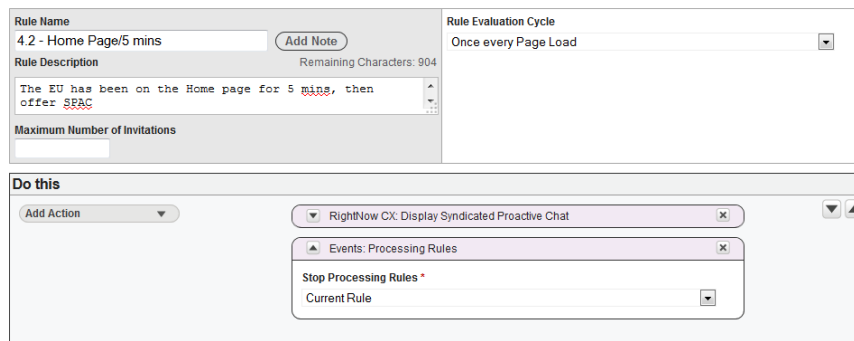
17. Any Page/Time On Page Rule

This rule is designed to offer a proactive chat invitation to an end-user, after the end-user has been on a page for a specific amount of time.

 **Note** Using known website information is a great place to start when initially choosing the value for Time on Site. Most organizations utilize Website Analytics on their website. Website Analytics may provide you a minimum, maximum or average time on page before an end-user converts or abandons. If using a Time on Page rule, the average time on page provided from your Website Analytics is an ideal value to begin with. Then you can measure the results to determine if a change needs to be made. Try, measure, try, measure, try...

 **Note** In each of these examples, the Current Page URL Value comes directly from your website. It is important to choose a value that is consistent and universal, so the chat invitations show on the appropriate pages.

- **Home Page/Time on Page Rule:** A popular variation of this rule is when the end-user idles on the home page for 300 seconds (=5 minutes), then a chat is offered.



The screenshot shows the configuration interface for a rule. The top section includes a 'Rule Name' field with the value '4.2 - Home Page/5 mins' and an 'Add Note' button. The 'Rule Description' field contains the text 'The EU has been on the Home page for 5 mins, then offer ~~SRAC~~'. The 'Rule Evaluation Cycle' is set to 'Once every Page Load'. The bottom section, titled 'Do this', shows an 'Add Action' dropdown and a list of actions. The first action is 'RightNow CX: Display Syndicated Proactive Chat'. Below it, there is an 'Events: Processing Rules' section with a 'Stop Processing Rules' dropdown and a 'Current Rule' dropdown.

Meets the following Conditions All

Add Condition

Visitor Interaction: Timeout

Inactivity Timeout Value *
300 Seconds

Mouse Movement Resets Timer
 Keyboard Input Resets Timer


Visitor Browsing: Current Page URL

Operator *
Contains

Value *
/home

Case Sensitive
 Trim Whitespace

- **Cart Page/Time on Page Rule:** A popular variation of this rule is when the end-user idles on any cart page for 180 seconds (=3 minutes), then a chat is offered.

 **Note** A popular addition to this rule is to include a condition for the value of the cart or product. This variation requires a JavaScript Variable. The JSVar comes directly from your website. For more information, review Rules #12 & #13 in this document.

Rule Name
4.2 - Cart Page/3 mins

Add Note

Rule Description
Remaining Characters: 904
The EU has been on the Cart page for 3 mins, then offer SPAC

Maximum Number of Invitations

Rule Evaluation Cycle
Once every Page Load

Do this

Add Action

RightNow CX: Display Syndicated Proactive Chat

Events: Processing Rules

Stop Processing Rules *
Current Rule

Meets the following Conditions All

Add Condition

Visitor Interaction: Timeout

Inactivity Timeout Value *
180 Seconds

Mouse Movement Resets Timer
 Keyboard Input Resets Timer

Visitor Browsing: Current Page URL

Operator *
Contains

Value *
/cart

Case Sensitive
 Trim Whitespace

- Checkout Page/Time on Page Rule:** A popular variation of this rule is when the end-user idles on any checkout page for 300 seconds (=5 minutes), then a chat is offered.

Rule Name 4.2 - Checkout Page/5 mins Add Note	Rule Evaluation Cycle Once every Page Load
Rule Description Remaining Characters: 900 The EU has been on the Checkout page for 5 mins, then offer SRAC	
Maximum Number of Invitations <input type="text"/>	
Do this	
Add Action RightNow CX: Display Syndicated Proactive Chat	
Events: Processing Rules	
Stop Processing Rules * Current Rule	
Meets the following Conditions All	
Add Condition	
Visitor Interaction: Timeout	
Inactivity Timeout Value * 300 Seconds	
<input checked="" type="checkbox"/> Mouse Movement Resets Timer <input checked="" type="checkbox"/> Keyboard Input Resets Timer	
Visitor Browsing: Current Page URL	
Operator * Contains	
Value * /checkout	
<input type="checkbox"/> Case Sensitive <input checked="" type="checkbox"/> Trim Whitespace	

- Shipping Page/Time on Page Rule:** A popular variation of this rule is when the end-user idles on any shipping page for 420 seconds (=7 minutes), then a chat is offered.

Rule Name 4.2 - Shipping Page/7 mins Add Note	Rule Evaluation Cycle Once every Page Load
Rule Description Remaining Characters: 900 The EU has been on the Shipping page for 7 mins, then offer SRAC	
Maximum Number of Invitations <input type="text"/>	
Do this	
Add Action RightNow CX: Display Syndicated Proactive Chat	
Events: Processing Rules	
Stop Processing Rules * Current Rule	

Meets the following Conditions All

Add Condition

Visitor Interaction: Timeout

Inactivity Timeout Value *

420 Seconds

Mouse Movement Resets Timer

Keyboard Input Resets Timer

Visitor Browsing: Current Page URL

Operator *

Contains

Value *

/shipping

Case Sensitive

Trim Whitespace

- Help Page/Time on Page Rule:** A popular variation of this rule is when the end-user idles on any Customer Service/Help/FAQ page for 30 seconds, and then a chat is offered. In this example, chat is offered when the end-user has been idle on the knowledge base answer #144 for 30 seconds.

Rule Name: 4.2 - Help Page/30 secs Add Note

Rule Evaluation Cycle: Once every Page Load

Rule Description: The EU has been on the knowledge base answer #144 for 30 seconds, then offer [SPAC](#)

Maximum Number of Invitations:

Do this

Add Action

RightNow CX: Display Syndicated Proactive Chat

Events: Processing Rules

Stop Processing Rules *

Current Rule

Meets the following Conditions All

Add Condition

Visitor Interaction: Timeout

Inactivity Timeout Value *

30 Seconds

Mouse Movement Resets Timer

Keyboard Input Resets Timer

Visitor Browsing: Current Page URL

Operator *

Contains

Value *

/answers/detail/a_id/144

Case Sensitive

Trim Whitespace

- Product Page/Time on Page Rule:** A popular variation of this rule is when the end-user idles on any product page for 300 seconds (=5 minutes), then a chat is offered.

Rule Name 4.2 - Product Page/5 mins Add Note	Rule Evaluation Cycle Once every Page Load
Rule Description Remaining Characters: 960 The EU has been on the product pages for 5 mins, then offer SPAC	
Maximum Number of Invitations <input type="text"/>	

Do this	
Add Action	RightNow CX: Display Syndicated Proactive Chat
	Events: Processing Rules
	Stop Processing Rules * Current Rule

Meets the following Conditions All	
Add Condition	Visitor Interaction: Timeout
	Inactivity Timeout Value * 300 Seconds
	<input checked="" type="checkbox"/> Mouse Movement Resets Timer <input checked="" type="checkbox"/> Keyboard Input Resets Timer
	Visitor Browsing: Current Page URL
	Operator * Contains
	Value * /pdp/
	<input type="checkbox"/> Case Sensitive <input checked="" type="checkbox"/> Trim Whitespace

- Discount/Time on Page Rule:** A popular variation of this rule is when the end-user idles on a special offer page or a promotional discount page for 180 seconds (=3 minutes), then a chat is offered.

Rule Name 4.2 - Discount Page/3 mins Add Note	Rule Evaluation Cycle Once every Page Load
Rule Description Remaining Characters: 962 The EU has been on a Discount page for 3 mins, then offer SPAC	
Maximum Number of Invitations <input type="text"/>	

Do this	
Add Action	RightNow CX: Display Syndicated Proactive Chat
	Events: Processing Rules
	Stop Processing Rules * Current Rule

Meets the following Conditions All

Add Condition

Visitor Interaction: Timeout

Inactivity Timeout Value *

180 Seconds

Mouse Movement Resets Timer

Keyboard Input Resets Timer

Visitor Browsing: Current Page URL

Operator *

Contains

Value *

/promotion/

Case Sensitive

Trim Whitespace

18. Multi-Page in Category/Time On Site Rule

This rule is designed to offer a proactive chat invitation to an end-user, after the end-user has been on a series of specific pages and then is on the final page, and has been on the website for a specific amount of time. In this example, if the end-user visits three BBQ product pages, and is on the site for three minutes, then offer a proactive chat.

Note This rule is used to target customers showing specific behavioral signs. The Page URL value comes directly from your website, so it is important to choose a value that is consistent, but not overly used. The Inactivity Timeout Value can be determined through Website Analytics. Website Analytics may provide a minimum, maximum or average idle time on page before an end-user abandons and this is a good value to begin with. Then you can measure the results to determine if a change needs to be made. Try, measure, try, measure, try...

Rule Name: 4.3 - Cat: BBQ/3x/Site: 3 mins

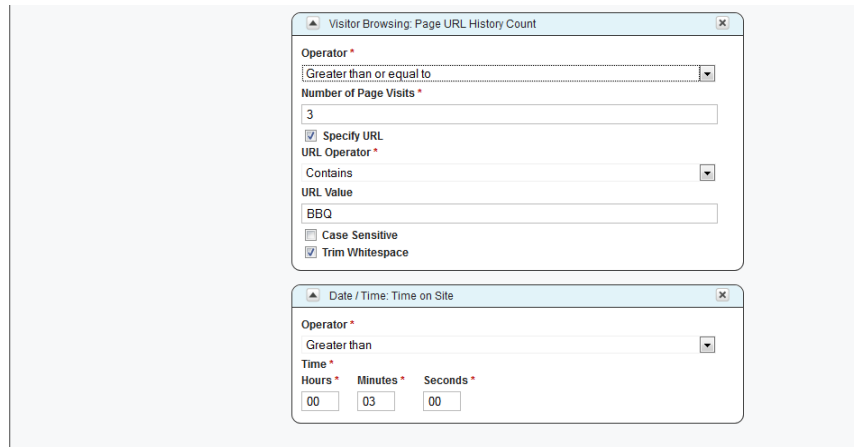
Rule Description: The EU has visited 3 BBQ product pages, offer SPAC after 3 mins on the site

Rule Evaluation Cycle: On Page Load

Recurrence: 5 Seconds

Do this: RightNow CX: Display Syndicated Proactive Chat

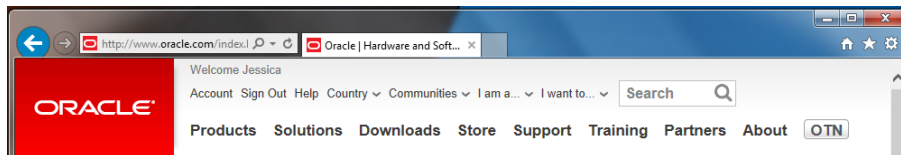
Meets the following Conditions All: Visitor Browsing: Current Page URL (Operator: Contains, Value: BBQ)



19. Mouse Out Rule

This rule is designed to offer a proactive chat invitation to an end-user, when the end-user mouses away from the body of the cart page by navigating into the browser area.

To ensure you have the correct Zone Coordinates, especially the coordinate for Height, please refer to your company’s marketing team. They can tell you the approximate zones for your website. For example, if you want to invite those that are moving into the zone for “Sign Out”, that will be vastly different than those moving to the zone for closing out of the browser.



Having too large of a zone results in over-inviting website visitors, so ensure you’ve tested this rule thoroughly before placing into production.

Note For the Mouse Out Rule, it is important to ensure the logical click-path to purchase is represented in the Value fields of the conditions. The URL Value for each condition comes directly from your website. For example, if it is logical for a customer to be in the cart then move to checkout, use that flow in the Value fields. Values will be URLs from your website that represents the cart->checkout process. When in the cart, if your customers tend to ‘continue shopping’, then choose a very specific URL to avoid over-inviting customers.

Rule Name 4.4 - MO: Cart Add Note	Rule Evaluation Cycle On Page Load
Rule Description Remaining Characters: 922 The EU mouses away from the body of the Cart page by navigating into the browser area, then offer SPAC	Recurrence 1 Seconds
Maximum Number of Invitations <input type="text"/>	Rule Evaluation Maximum Limit <input type="text"/>

Do this	
Add Action	RightNow CX: Display Syndicated Proactive Chat
Stop Processing Rules *	Current Rule

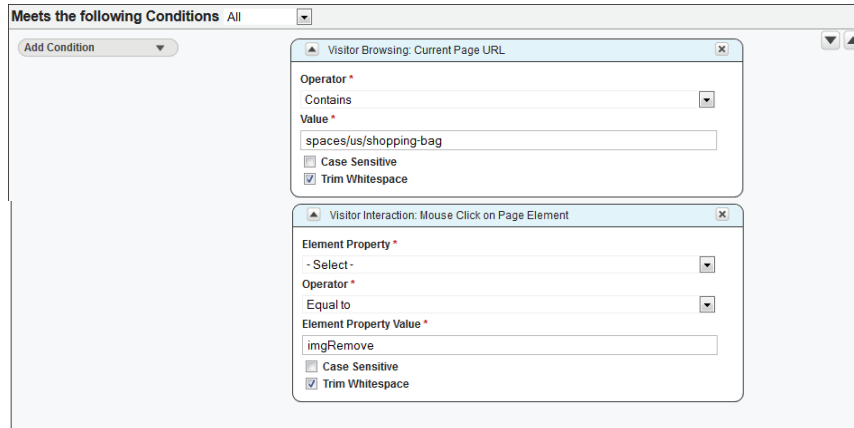
Meets the following Conditions All									
Add Condition	<table border="1"> <tr> <td> Operator * Contains </td> <td> Value * spaces/us/cart </td> </tr> <tr> <td> <input type="checkbox"/> Case Sensitive </td> <td> <input checked="" type="checkbox"/> Trim Whitespace </td> </tr> </table>	Operator * Contains	Value * spaces/us/cart	<input type="checkbox"/> Case Sensitive	<input checked="" type="checkbox"/> Trim Whitespace				
Operator * Contains	Value * spaces/us/cart								
<input type="checkbox"/> Case Sensitive	<input checked="" type="checkbox"/> Trim Whitespace								
<table border="1"> <tr> <td> Timeout * 0 Seconds </td> <td> Trigger Value * 1 Mouse Outs </td> </tr> <tr> <td colspan="2"> Zone Coordinates </td> </tr> <tr> <td> X Coordinate * 1 </td> <td> Y Coordinate * 1 </td> </tr> <tr> <td> Width * -1 Pixels </td> <td> Height * 50 Pixels </td> </tr> </table>	Timeout * 0 Seconds	Trigger Value * 1 Mouse Outs	Zone Coordinates		X Coordinate * 1	Y Coordinate * 1	Width * -1 Pixels	Height * 50 Pixels	
Timeout * 0 Seconds	Trigger Value * 1 Mouse Outs								
Zone Coordinates									
X Coordinate * 1	Y Coordinate * 1								
Width * -1 Pixels	Height * 50 Pixels								

20. Remove Items Rule

This rule is designed to offer a proactive chat invitation to an end-user, when the end-user removes items from the cart page.


Rule Name 4.5 - Remove Items Add Note	Rule Evaluation Cycle On Page Load
Rule Description Remaining Characters: 966 The EU removes a(n) item(s) from the Cart page, offer SPAC	Recurrence 1 Seconds
Maximum Number of Invitations <input type="text"/>	Rule Evaluation Maximum Limit <input type="text"/>

Do this	
Add Action	RightNow CX: Display Syndicated Proactive Chat
Stop Processing Rules *	Current Rule



21. Data Collection Rule

Data Collection rules are used for a variety of reasons. For example, if a company wants to collect ‘known’ information about the authenticated end-user and pass it into the chat session. This is helpful to both the end-user and the agent, so the end-user does not need to supply contact information in a pre-chat form. Another example is when company wants to collect data from the page to enrich reporting. Any information that adds meaning to analytics and/or will aid the agent in offering superior customer experience is useful to collect. The Data Collection rule should be the last rule in the list of production rules. Please see Appendix A for more information on how Queue Routing Rules work with Data Collection Rules.



Note The Data Collection Rule should not contain data used to route the chat session to a Queue. Queue routing data should be collected within the “Queue Routing” rule described in Rule 1 of this document.

In this example, we are collecting the Loyalty Program Number and the Session ID from the source code on the webpage. This rule can only be effective if a form field exists to gather this information from, or there is a reliable and consistently available JavaScript Variable on the pages where chat is launched.

For Data Collection Rules to function properly, the proper JavaScript Variables must exist in the source code of your website. To understand how this rule can apply to your website, please check with your internal development team (those who create and maintain your company’s website). They will know which JavaScript Variables currently exist or if other variables can be used to collect the same information. It is best to collect specific variables for this rule; otherwise no information will be gathered.

Rule Name 5.1 - Data Collection Add Note	Rule Evaluation Cycle On Page Load
Rule Description Collect the following data from an authenticated end-user: Loyalty Number & Session ID <small>Remaining Characters: 938</small>	Recurrence 1 Seconds
Maximum Number of Invitations <input type="text"/>	Rule Evaluation Maximum Limit 10

Do this	
Add Action ▼	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"><p>▲ RightNow Custom Data: Populate from JavaScript Variable</p><p>Custom Data Field * None</p><p>RightNow Custom Data Field Custom Data Field</p><p>RightNow Custom Data Field ID * 4</p><p>JavaScript Variable * MemberID</p></div> <div style="border: 1px solid #ccc; padding: 5px;"><p>▲ RightNow Custom Data: Populate from JavaScript Variable</p><p>Custom Data Field * None</p><p>RightNow Custom Data Field Custom Data Field</p><p>RightNow Custom Data Field ID * 5</p><p>JavaScript Variable * SessionID</p></div>

For more information on Rules and configuration, please reference the Engagement Engine User Manual, which can be found in the Help menu of your Engagement Engine.

Appendix A

May 2017 update to Syndicated Chat Widgets

In the Oracle Service Cloud May 2017 release we have updated the Syndicated Chat Widgets, so that:

- Custom Data Fields are more easily propagated in Chat
- If a Single Page Application design is deployed on your external website, the business is able to capture Custom Data across page turns
- Custom Data is more accurately captured for analytics and agent efficiency

To take advantage of the updates released in May 2017, these requirements must be met:

- i. CX Site is 17.5+
- ii. Chat is enabled for the CX Site & Interface
- iii. Engagement Engine is enabled for your Site
- iv. Syndicated Chat is deployed on your company's website

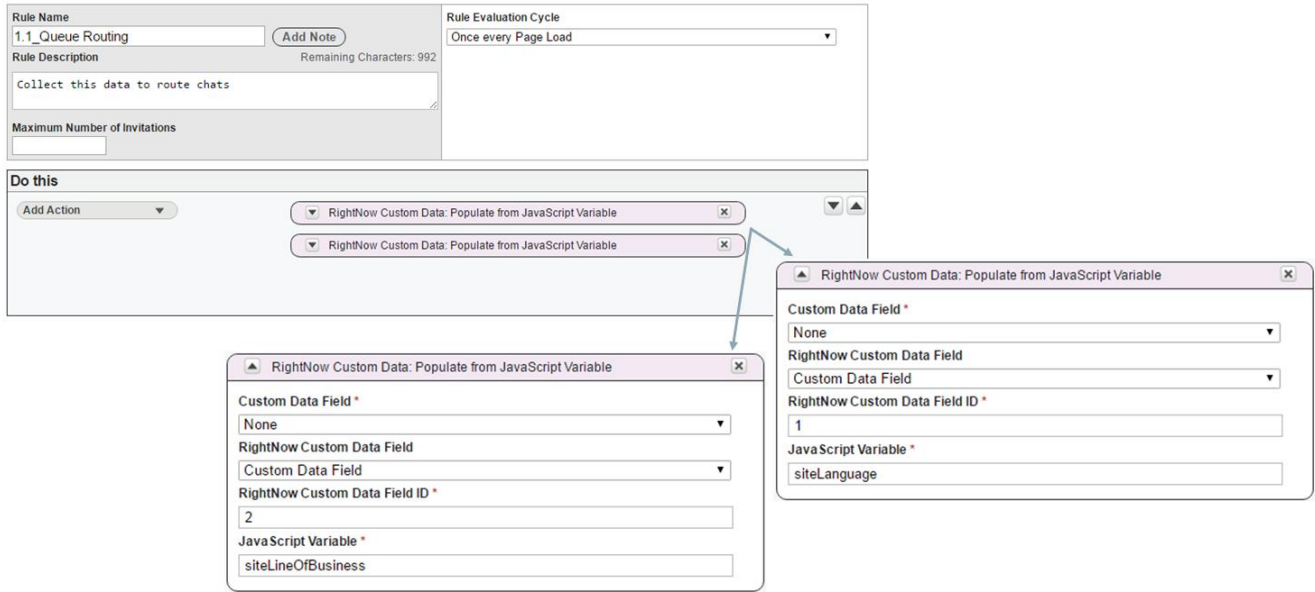
Setup Details

Engagement Engine Rules are broken into a workflow of three, where rule-order is important:

1. The first rule in the list of Engagement Engine Rules should be the “Queue Routing” Rule, Reference #1 in this document. Create this Queue Routing rule to collect custom data fields used for chat queue routing. The data collected in this rule **should not contain any unique values**. Examples of data you want to use for routing are Product, Category, Language, or Line of Business
2. Then, create rules that will “Display the Chat Widget”, either the SCCL or SPAC widgets. These are the rules listed as Reference Rules #5 - #20 in this document
3. Finally, create a “Data Collection” Rule, Reference #21 in this document. The Data Collection rule should be the last rule in the list of production rules. The Data Collection rule collects additional custom field data that is unique to an end-user, such as email address or loyalty number

Examples describing each of these three rules follow:

Example: “Queue Routing” Rule #1



Rule Name: 1.1_Queue Routing (Add Note)

Rule Evaluation Cycle: Once every Page Load

Rule Description: Collect this data to route chats (Remaining Characters: 992)

Maximum Number of Invitations: []

Do this:

- RightNow Custom Data: Populate from JavaScript Variable
- RightNow Custom Data: Populate from JavaScript Variable

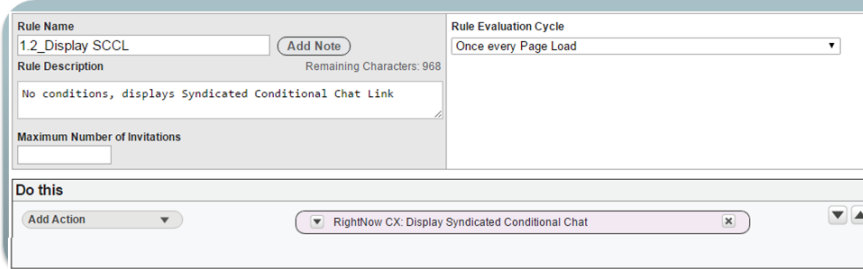
Callout 1:

- Custom Data Field: None
- RightNow Custom Data Field: Custom Data Field
- RightNow Custom Data Field ID: 2
- JavaScript Variable: siteLineOfBusiness

Callout 2:

- Custom Data Field: None
- RightNow Custom Data Field: Custom Data Field
- RightNow Custom Data Field ID: 1
- JavaScript Variable: siteLanguage

Example: “Display Chat Widget” Rule #2



Rule Name: 1.2_Display SCCL (Add Note)

Rule Evaluation Cycle: Once every Page Load

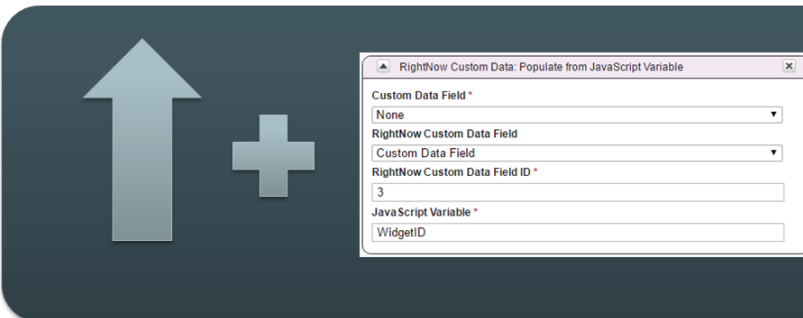
Rule Description: No conditions, displays Syndicated Conditional Chat Link (Remaining Characters: 968)



Maximum Number of Invitations: []

Do this:

- RightNow CX: Display Syndicated Conditional Chat

Example 1 displays the Syndicated Conditional Chat Widget, assuming there is only one chat widget on the page



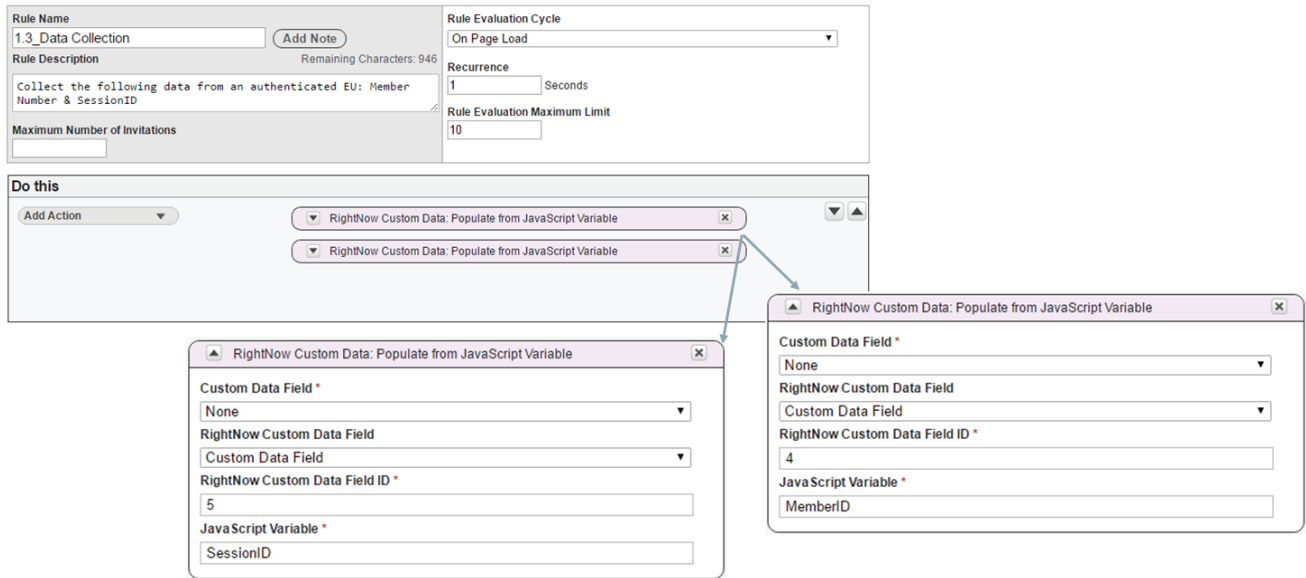
 

Callout:

- Custom Data Field: None
- RightNow Custom Data Field: Custom Data Field
- RightNow Custom Data Field ID: 3
- JavaScript Variable: WidgetID

Example 2 displays the Syndicated Conditional Chat Widget & captures the widget 'name' or ID, when there are multiple chat widgets on the page

Example: “Data Collection” Rule #3



The screenshot displays the configuration for a rule named "1.3_Data Collection".

- Rule Name:** 1.3_Data Collection
- Rule Evaluation Cycle:** On Page Load
- Recurrence:** 1 Seconds
- Rule Evaluation Maximum Limit:** 10
- Rule Description:** Collect the following data from an authenticated EU: Member Number & SessionID
- Maximum Number of Invitations:** (empty field)

The "Do this" section contains two actions: "RightNow Custom Data: Populate from JavaScript Variable".

Two expanded windows show the configuration for these actions:

- Window 1 (Left):**
 - Custom Data Field: None
 - RightNow Custom Data Field: Custom Data Field
 - RightNow Custom Data Field ID: 5
 - JavaScript Variable: SessionID
- Window 2 (Right):**
 - Custom Data Field: None
 - RightNow Custom Data Field: Custom Data Field
 - RightNow Custom Data Field ID: 4
 - JavaScript Variable: MemberID

Things to Consider

- These updates only apply to Syndicated Chat Widgets that are driven by the Engagement Engine; these updates do not apply to Syndicated Chat Widgets that are hard-coded onto a page
- If Product & Category are specified on the widget and there is no need to gather data that will define the queue, then the first “Queue Routing” rule is not necessary. The “Queue Routing” rule is not necessary because the widget already knows where the chat is routing
- If there is more than one chat instance deployed on the page (ex: SCCL #1 is located in the header and SCCL #2 is located in the footer) and it is necessary to capture the widget name (ex: for reporting purposes), then the “Display Chat Widget” rule should include an action to “Populate from JavaScript Variable” either a widget name or ID