

Best Practices for Quick Deployment of B2C Service Inlays

Oracle ACX Sales and B2B Service

With Inlays, you can embed B2C Service functionality directly into your web pages.

Your customers don't need to navigate away for help anymore - self-service and chat assistance are right where they need it. They can access relevant knowledge through the Top Answers inlay and can contact chat agents with the Proactive or Conditional Chat inlays.

Use the information in this document to plan and deploy Inlays for your customers.

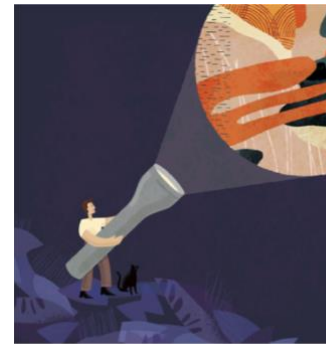
Plan your deployment

- Determine which inlays you wish to deploy: Conditional Chat, Proactive Chat, Top Answers.
- Choose which of your web pages you wish to deploy each inlay on.
- Engage with the administrators of these web pages/web sites to agree on the necessary changes and understand how to get these made.
- For chat inlays, engage with your contact center management to ensure that they are comfortable with the likely impact of the chat inlay changes (increases or decreases in request volumes) and that sufficient agent capacity is going to be available.

Organize the Rollout

Plan and organize a controlled, phased rollout of your chosen inlays:

- Start with a single page or a small set of pages.
- Monitor the impact of the initial rollout, and adjust the deployment where appropriate
- When satisfied, continue deployment to additional pages, in multiple stages if necessary.
- Continue to monitor the results of the inlay deployment, making appropriate adjustments as and when these are needed.



Target audience

- Business Administrator
- Application Administrator
- Business Manager
- Project Manager
- Implementer

More kit components

- [Video](#)
- [Do you know about B2C Service Inlays?](#)

Quick link to resources

- [Implementation & Management Series](#)
- [Verify Certification Badges](#)
- [Recommended Training for Customers](#)
- [Best Practices Resource Center](#)
- [My Oracle Support \(MOS\)](#)
- [Oracle Help Center](#)

Other Helpful Links

- [System Requirements](#)
- [Oracle University](#)
- [Oracle Partner Finder](#)

Connect with Us

- [Cloud Customer Connect for sales](#)
- [Send us feedback on this guide](#)

Deploy the Inlays

1. Preparation: Work with your website administrators

- Identify the appropriate contacts for the website(s) on which to deploy the inlays.
- Determine on which web pages to deploy the inlays and discuss with the team.
- Share with the contacts the inlay registry for your site at - [your_domain.custhelp.com/s/oit/latest/](#)
- Share with the contacts examples of the code to be integrated into the web pages. To view the examples, navigate to Documentation > Inlays > (your selected inlay) section.
- If the target website uses a content management system (CMS) that uses templates then, depending on your requirements, it is appropriate to add the code into one or more templates instead of handling each page individually.

2. Preparation: Work with your contact center

- Ensure your contact center is ready for any expected changes due to the inlay implementation.

3. Determine inlay parameters

Refer your website administrators to the inlay registry for your site at [your_domain.custhelp.com/s/oit/latest/](#) and look at:

- For the conditional chat inlay: Inlays > inlay-oracle-chat-ccl
- For the proactive chat inlay: Inlays > inlay-oracle-chat-pac
- For the embedded chat inlay: Inlays > inlay-oracle-chat-embedded
- For the top answers inlay: Inlays > inlay-oracle-knowledge-top-answers
- Attributes control the behavior of the inlay. Evaluate each attribute and determine the right value for your requirements.
- Strings determine what text is shown on screen as part of the inlay functionality. Review the default values and decide if you need to change any.

Note: If you want to change any strings you must use the configuration file described below.

4. OIT configuration file

- Use an OIT configuration file to hold the configuration for your inlays.

This keeps the inlay HTML clean and free of long lists of configuration attributes and is the only way to customize strings of theme variables.

For information on using configuration, see the inlay registry for your site at - [your_domain.custhelp.com/s/oit/latest/](#) and view related details at Documentation > OIT Config Files.

- Specify the use of a configuration file by using the data-oit-config-url attribute for the OIT loader script.

NOTE: The configuration file MUST be loaded from the same domain where the inlay is being used. Otherwise, Cross Origin Resource Sharing (CORS) restrictions in modern browsers will prevent the configuration file from being loaded.

5. Authorization

To allow inlays to be loaded from external websites, you must authorize the websites by setting the OIT_CORS_ALLOWLIST (previously OIT_CORS_WHITELIST) configuration setting.

- ❑ Login to the agent console as an administrator.
- ❑ Navigate to Configuration > Site Configuration > Configuration Settings.
- ❑ Update OIT_CORS_ALLOWLIST/OIT_CORS_WHITELIST with a regular expression that matches the domains where the inlays will be deployed. The recommendation is a list of website domains separated by the pipe character '|'.
 - Example: www.oracle.com|documentation.oracle.com|cx.rightnow.com

6. Accessibility

To make inlays accessible to screen readers you must include the OIT A11y alert in inlay deployments:

```
<div aria-live="assertive" id="oit-a11y-alert"></div>
```

7. Other Points to Consider

- The top answers inlay can take its search terms from the web page it is loaded into, by setting the search-seed attribute to 'META_KEYWORDS'. This can prevent the need to add page specific configuration to either the inlay code in the page or the OIT configuration file.
- You can use engagement engine to offer inlays in a more dynamic way. See How to load Inlays with Engagement Engine for more details.

Resources

- [Latest inlay registry](#)
- [Answers about chat inlays](#)
- [Oracle Inlay Updates](#)

Connect with us

Call +1.800.ORACLE1 or visit [oracle.com](https://www.oracle.com). Outside North America, find your local office at: [oracle.com/contact](https://www.oracle.com/contact).

 blogs.oracle.com

 facebook.com/oracle

 twitter.com/oracle

 oracle.com/cx/resources

Copyright © 2020, Oracle and/or its affiliates. All rights reserved. This document is provided for information purposes only, and the contents hereof are subject to change without notice. This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document, and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group. 0120

Disclaimer: This document is for informational purposes. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, timing, and pricing of any features or functionality described in this document may change and remains at the sole discretion of Oracle Corporation.