ORACLE

ORACLE RIGHTNOW CX CLOUD MANAGED SERVICES

This document outlines Oracle RightNow CX Cloud Managed Services functional and technical tasks that may be completed in a RightNow application. Throughout the CX Cloud Managed Services engagement we will define the risk level and recommended implementation approach to minimize production system impact. Following these guidelines will allow us to ensure the successful delivery of your requested changes to your RightNow solution.

COMMON CONFIGURATION

Task	Description
Application Appearance Application Appearance defines the screen administrators and agents see when logged into the RightNow application. Items such as accessing incidents, adding answers, viewing fields and accessing reports are changed here. These items are all a part of your account profile and can enable or prevent a staff account from completing their tasks in RightNow.	
Workspaces	Workspaces determine the layout of fields, controls, and tabs on the content pane as well as the arrangement of buttons on the ribbon and the Quick Access toolbar (QAT).
Workspace Rules	Set up Workspace rules to dynamically adjust the display, behavior and values of fields and controls on a workspace (incident, answer, contact, task, etc.) based on staff member actions. Each rule is triggered by one or more events and conditions.
Navigation Sets	Define navigation sets to control the navigation lists and buttons that staff members see on the navigation pane of the RightNow Console. They provide users with access to information and tools within the RightNow system. A navigation set may contain links to reports, dashboards and other controls within each application area.
Scripts	Create scripts and use them as controls that can be added to a custom workspace to help staff members enter record information in a logical order. Scripts can contain multiple pages with fields and other controls as well as branching logic to guide staff members to different pages based on actions they take on a script page.
Staff Management Helps to create password-protected staff accounts, organize your staff members into groups, and define their access to RightNow through profiles.	
Account Profiles	By creating profiles, one can control access to administration functions. Profiles are used for assigning staff members specific permissions, default workspaces, a default navigation set, and report access.

Staff Accounts	Staff accounts define the staff members who have access to the administration interface in RightNow.
Password Configuration	You can enhance your staff members' password security through options that allow you to prevent repeated invalid login attempts and to set password length, character requirements, and expiration options.
Common Customizable Menus Customizing drop-down menus helps organize and classify information in the knowledge base beyond the already flexible alternatives that are available. When you add menu options that staff members can select while working with records, you increase the accuracy and thoroughness of the knowledge base.	
Countries	Maintain accurate, consistent data by adding the countries and provinces your organization does business in.
Price Schedules	Establish various pricing schedules that can be applied to sales products (e.g. US, Canadian Reseller, Australian, etc.).
Product Catalog	Use the product catalog to add, edit, and categorize sales products and assign price schedules to them.
Contact Types	Add contact types to help you organize contacts in ways that are most useful to your organization (e.g. Student, Doctor, Engineer, etc.).
Channel Types	Channel types are used by contacts to provide their user names for Twitter and YouTube through the customer portal.
Organization Address Types	Add organization address types when you need more flexibility than that offered by the standard billing and shipping addresses.
Common Business Rules Business rules are powerful tools for simplifying and automating common business tasks.	
Contact Rules	Contact Rules are triggered when contact records are created or updated. For example, you can use contact rules to automatically apply service level agreements (SLAs) or to set fields based on how the record is created or updated.
Organization Rules	Organization Rules are triggered when organization records are created or updated. For example, you can use Organization Rules to notify support staff or accounts receivable when an organization record is created or updated.
Task Rules	Task Rules are triggered when a task is created or updated. Task rules can be used to notify staff members when a task is overdue.
Common Custom Fields When implementing RightNow, you may want to add your own fields for gathering special information about staff accounts, contacts, organizations, sales products, and tasks. **Note:** You can add up to 500 custom fields in any combination of the nine types of custom fields available in RightNow.	
Staff Account	Add this type of custom field to store additional information about your staff members in their staff account (e.g. hire date). Staff account custom fields appear on the Custom Fields page of the Staff Accounts editor.
Contact	Add this type of custom field to gather additional

	information about your contacts (e.g. age). Contact custom fields can be displayed when adding or editing a contact record, while engaged in a chat session, and on the customer portal.
Organization	Add this type of custom field to gather additional information about your organizations (e.g. number of employees in the organization). Organization custom fields can be displayed when adding or editing an organization.
Sales Products	Add this type of custom field to specify additional information about sales products in your product catalog (e.g. international product availability). Sales products custom fields appear on the Custom Fields page of the Sales Products editor.
Tasks	Add this type of custom field to store additional information about tasks for your staff members when adding or completing a task.
Site Configuration RightNow's Site Configuration options allow you to configure and customize your site. You can customize configuration settings, either individually or using a wizard, to enable, disable, and configure RightNow functions. You can also change some of the text used in RightNow by editing message bases.	
Interfaces	Use this to change the name of the interface as it is displayed for staff members.
File Manager	The RightNow File Manager provides direct access to RightNow files located on the hosting servers that can be used to customize your organization's application. Using the File Manager, you can view, edit, replace, and back up files that control many aspects of RightNow.
Message Bases	Text strings that appear on the administration interface, the customer portal, and in email messages and notifications. By editing message bases with the Message Base Editor, you can change the descriptive text within the RightNow application.
Settings	Configuration settings are used to enable, disable, and configure RightNow products and many functions and features in RightNow. You can customize these settings through the Configuration Editor.
Distribution Lists	Email address lists that you can use when scheduling reports, configuring rule notifications, forwarding incidents and opportunities, and using CC and BCC in incident responses.
Mailboxes	Configure Mailboxes to send and receive email for RightNow Service and Marketing. You can also enable or disable email messages and choose to send emails as text or HTML.
Database	
Incident Thread Type Correction	Use this feature to convert a response thread entry into a note thread entry so it will not be seen by customers in any future response.
Email Address Sharing	Email address sharing gives you the ability to associate a single email address with multiple contact records, which allows a group of related contacts (such as a family or a team) to maintain individual

	contact records while sharing an email address.
Contact Upload	
Contact Upload Template	Templates allow you to skip some upload wizard steps—such as mapping columns to database files and customizing duplicate criteria—when performing uploads of multiple data files that have the same column ordering.
Contact Upload Wizard	Contact Upload Wizard is used to map the data file to columns in the *contacts* table and prescan the file for problems, such as duplicate or invalid email addresses.

SERVICE CONFIGURATION

Task	Description
Service Customizable Menus	
Products/categories/dispositions ➢ Product Linking	Allows user to configure product, categories, and dispositions and link them together. As a result, staff members and customers can quickly find answers to their questions.
Incident Statuses	An incident's status is its state in the knowledge base. RightNow Service has four default incident statuses: Solved, Unresolved, Updated, and Waiting. There are three default status types: Solved, Unresolved, and Waiting.
Incident Severity	Define severity levels to classify incidents so that agents can resolve the highest severity incidents first.
Incident Queues	Define queues that can be used in incident rules to route unresolved incidents into different custom defined queues based on the criteria you define.
Chat Session Queues	Chat session queues, when used with profiles and business rules, enable automatic sorting of incoming chats based on contact, organization, product, category, and custom field information.
Chat Agent Statuses	Although RightNow Chat contains default chat agent statuses, you can create custom agent statuses and associate them with either the Available or Unavailable status type.
Answer Statuses	An answer's status controls whether it is public and describes its state in the knowledge base. Every answer status is associated with a status type that is either Public or Private.
Answer Access Levels	Answer access levels provide a way to control which answers in the knowledge base become public and visible to customers.
Billable Tasks	Allows one to track the amount of time agents spend on customer issues and questions. When you enable this feature, agents can add their time to an incident as they work on it.
Service Business Rules Business rules route incidents to the suitable support person, notify an engineer when answers in the knowledge base should be reviewed, and automatically answer customer questions.	

Incident Rules	Incident Rules are triggered when incidents are created or updated. You can use incident rules to notify staff when incidents are received, to automate an escalation, or to present end-users with SmartAssistant suggested solutions.
Answer Rules	Answer Rules are triggered when answers in the Answer Console are created or updated. You can use answer rules to notify your knowledge engineer when a new answer has been proposed or to notify your legal team when a finished answer is ready for their review.
Chat Session Rules	Chat Session Rules are triggered when a new request for a chat session is received. You can use chat session rules to route chat requests to a particular agent queue and to escalate the request to another queue if it is not answered in a specific amount of time.
Service Custom Fields When implementing or making changes to RightNow, you may want to add your own fields for gathering special information about incidents and answers.	
Incident	Add this type of custom field to gather additional information about customers' questions (e.g. model/serial numbers). Incident custom fields can be displayed when adding or editing an incident and on the Ask a Question and Support History pages.
Answer	Add this type of custom field to store and provide additional information about answers in your knowledge base (e.g. version numbers the answer applies to). Answer custom fields can be displayed when adding or editing an answer and on the Answers and answer detail pages.
Content Library	
Standard Text	Any text or response prepared in advance that can be sent to customers when responding to incidents, appended to responses by a business rule, or sent by an agent during a chat session. Also called *standard response.*
Variables	A temporary data item in a rule base. The variable is assigned an initial value that can be modified through rule actions, used as a rule condition to trigger other actions, and restored to its initial value for the next round of rules processing. Variables also refer to shortcuts defined for a larger string that can be inserted in the body of an answer or inserted inline during a chat session. When the variable is inserted in the body of the answer or in a chat response, it is replaced with the variable value.
Guided Assistance Explorer	Helps agents quickly locate answers and text explanations using branching questions to guide them to the answers they need. The answers and explanations agents find can be sent to customers in incident responses or relayed to customers over the phone. Guides can also be made available to customers on the customer portal to help them find answers to questions.

Channels	Defines the source of an incoming incident or an outgoing response.
Service Level Agreements Service Level Agreements enable you to control the type and amount of support you offer your customers.	
Response Requirements	Configure response requirements to measure agent performance in responding to and solving incidents and can also be used for SLAs that do not have customized response requirements.
Service Level Agreements	A contract that is applied to contacts and organizations specifying the level and type of customer service they are eligible to receive.
Holidays	By adding holidays, you can temporarily suspend response requirements for those days when staff members are not available to respond to customer inquiries and answer their questions.
Knowledgebase Configuration	
External Search Configuration	Enables indexing and searching of documents that are not part of the published answers of your RightNow application.
Search Priority Words	Search priority words let you associate a specific answer or document with specific search terms to ensure that the answer (or document) will always be returned when a customer enters the search term. When you've assigned a search priority word to an answer and the customer enters the search priority word, the answer is displayed in the Recommended Links section on the Answers page.
Answer stop words	These are common words that are excluded from indexing and searching from answers.
Incident stop words	These are common words that are excluded from indexing and searching from incidents.
Topic Browse	A feature that provides clustering functionality on the customer portal so customers can browse specific topics to find related answers.
Offer Advisor The Offer Advisor allows you to create promotions and define which groups of customers are eligible for each promotion. It also provides agents with solid information to successfully present offers to customers and contribute to increased revenue for your organization.	
Target Rules	A type of business rule that has the sole purpose of creating a target consisting of contacts who meet the conditions established by the rule.
Promotions	A specific message (e.g. a discount, renewal notice, or announcement) delivered to a specific group of customers using Offer Advisor.

MARKETING / FEEDBACK CONFIGURATION

<table>
<tr><th>Task</th><th>Description</th></tr>
<tr><td colspan="2">Marketing Customizable Menus</td></tr>
<tr><td>Tracked Link Categories</td><td>Used to group and organize tracked links.</td></tr>
<tr><td colspan="2">Communication Configuration</td></tr>
<tr><td>External Suppression List</td><td>Used to define a list of email addresses that are excluded from mailings and surveys.</td></tr>
<tr><td colspan="2">Audiences</td></tr>
<tr><td>Contact Lists</td><td>A static or fixed group of contacts that is used to choose the contacts who receive a broadcast mailing or survey.</td></tr>
<tr><td>Segments</td><td>The criteria for creating dynamic lists of contacts based on user-defined filters. Multiple filters can be created and logical expressions can be used to create the exact data set needed to target contacts.</td></tr>
<tr><td colspan="2">Content Library</td></tr>
<tr><td>Documents</td><td>Used in a survey, mailing, or served as a web page that can contain text, snippets, conditional sections based on contact filters, merge fields, links, and web forms.</td></tr>
<tr><td>Snippets</td><td>Any text or part of a document that can be used in more than one document. Snippets can be added to documents from the Content Library component.</td></tr>
<tr><td>Templates</td><td>A structured format used in a document in which specified sections are locked and cannot be edited and a section is open for customized content.</td></tr>
<tr><td colspan="2">Mailings
A collection of one or more messages sent to one or more contacts. A mailing can contain multiple messages for testing purposes.</td></tr>
<tr><td colspan="2">Campaigns
A multiple-step marketing process based on business logic. Campaigns can contain any number of actions and decisions and move contacts through a series of steps when specified criteria have been met.</td></tr>
<tr><td colspan="2">Feedback</td></tr>
<tr><td>Broadcast Surveys</td><td>A survey sent as a broadcast mailing in which the message, audience, and mailing options are defined in the survey.</td></tr>
<tr><td>Transaction Surveys</td><td>A survey that is sent only when an event occurs. Transactional surveys are sent to a contact when the contact meets specified criteria in a campaign or business rule and can be scheduled to be sent immediately, on a specific date, or at an interval in the future.</td></tr>
<tr><td>Questions</td><td>The main element in a survey. Text, choice, and matrix question types can be created. Questions can be used in multiple surveys, mixing and matching as necessary.</td></tr>
</table>

ORACLE

SALES CONFIGURATION

Task	Description
Sales Customizable Menus	
Contact Roles	Allow staff members to identify the same contact by different roles in different opportunities.
Opportunity Statuses	Used to identify the current state of opportunities in the knowledge base.
Competitors	Adding competitors to your knowledge base helps your organization track won and lost opportunities by competitor.
Win/Loss	Identify win/loss reasons to determine what contributes to the outcome of opportunities.
Industry Type	Set industry types to identify those your customers are associated with.
Lead Rejection Type	Use lead rejection types to identify reasons for rejecting prequalified opportunities.
Business Rules	
Opportunity Rules	Opportunity rules are triggered when a sales opportunity is created or updated. You can use opportunity rules to notify managers when a sales opportunity reaches a certain status in your sales cycle.
Custom Fields	
Opportunity	Add this type of custom field to gather additional information about opportunities (e.g. the contact's previous service or product). Opportunity custom fields can be displayed when adding or editing an opportunity.
Sales Quotes Custom Fields	Add this type of custom field to store additional information about the quotes sent to customers (e.g. the date the quote was requested). Sales quotes custom fields can be displayed when adding or editing an opportunity.
Sales Process A sales plan defined by an organization that includes stages and associated tasks that must be completed in order for opportunities to move through each stage.	
Strategies	Strategies allow organizations to define multiple sales plans based on their business processes and help ensure that policies and procedures are enforced.
Sales Period	The period of time used to track the revenue goals assigned to each sales representative. The default sales periods are annual, semi-annual, quarterly, monthly, and weekly.
Territories	A specific geographical sales region configured in RightNow Sales. Sales representatives can be assigned specific territories for opportunity assignment. Up to twelve levels of territories can be defined.

COMMUNITY CONFIGURATION

Task	Description
General Settings	
Community Naming	Define the name of the community, visible in the browser title bar.
Privacy	Set the visibility of the community between public and private.
Time Zone Settings	Set the default time zone, displayed only when a user's browser can't detect local time zone.
Support Email	Email address where public-facing contact and invitation request messages are sent.
Users	
User creation	Creation of new community member profiles.
User updates	Assistance with updating individual user account settings.
Profile template settings	Maintenance of the user profile template fields and settings.
Create new user types	Definition and creation of powers for new types of users (e.g. Moderator).
Create User Billing	Assigning a small icon or badge to specific user types (e.g. Employee or Steering Committee Member).
Moderating member accounts	Suspending, deleting, or re-enabling individual member accounts.
Applications, Groups, Content	
Create applications	Creation of new community applications (e.g. discussion forum, blog, or idea center).
Administer application permissions	Control who can access an application, and what powers they have within the application.
Create panels	Add new content panels to an application or group summary page, or to a custom page.
Update panels	Modify existing panel settings.
Create custom pages	Create new community pages, including layout of content panels.
Create groups	Create new content, or people, focused groups.
Administer group permissions	Control who can access a group, and what powers they have within the group.
Create post types	Create the structure for new types of content (e.g. a blog post is built differently than a discussion forum post).
Highlight read/unread posts	Application settings that display a previously read post differently than an unread post.
Move posts	Moving content between applications.
Enable subscriptions	Content subscription settings.
Image hosting	RightNow hosting of images used in WYSIWY or HTML panels.
Design Skinning	
Change logo or header/footer design elements	Update the company logo, other design elements defined in the header/footer.
Create theme	Create a unique design skin to be applied to a specific application, group, or page.
Terms of Service/Privacy content	Update static legal content.

updates	
Community Admin Settings	
Update master template, site navigation	Adjust the elements and links in the primary site navigation, as well as top/bottom text navigation links.
Join Codes	Create and track unique codes, used to facilitate joining the community.
Provision and using invitations	Define if, and how, members can invite other members into the community.
Community flagging	Settings for flagging inappropriate content.
Adjust flagging threshold	Settings that define when inappropriate content is removed from community visibility.
Reputation levels	Point thresholds that define different member reputation levels.
Reputation actions	Point assignments for different community actions (e.g. submit a post, submit a comment, or rate something).
Using Analytics and Reporting	Assistance in reading and interpreting community reporting data.
Language settings/Internationalization	Defining supported languages, translations.
Troll Filter	Setting that flags a disruptive member, and renders their content invisible.
Profanity filters and word list	List of profane words which are censored from community visibility.
Modify error page content	Edit the content displayed for common system error messages.
Modify system email content	Edit the content displayed for common outbound system emails.
Escalation of a Post into RightNow incident	Settings for when, and how, a community post is escalated into a RightNow CX incident.
Tips content	Edit the “Tip” content that appears on the login page.
Adjust session length	Define the number of hours a community session is valid.
Single Sign-On adjustments	Adjustments to the sign-in, sign-out, or new account creation processes.
Miscellaneous	
Quarterly platform upgrades	Review of new feature release notes, training on new functionality.

TUNE-UPS

Task	Description
TUNE-UPS Tune-Ups help clients achieve the greatest return on their investment by following the best practices with RightNow CX. A Tune-Up experience starts by reading an introductory Guide document to learn about the best practices for a specific feature area, and then engaging a Consultant to score your deployment against a Checklist to determine your current level of performance.	
Web Experience Design	This Tune-Up package contains our official guidelines that can help you achieve success with Web Self-Service. Specific checkpoints in six main practice areas are included: • Understand the issues your customer have

ORACLE

	• Provide clear and readable content • Offer multi-channel choice • Capture customer feedback about the web experience • Optimize the performance of your site • Ensure it is accessible
Knowledge Base and Search	This Tune-Up package contains our official guidelines for ensuring that your Knowledge Base is working for your highest volume search terms. Included are instructions on: • Discovering what your customers search for • How to fix search engine configuration problems • Tweaking individual searches to return great results
Answer Content	This Tune-Up package contains our official guidelines for designing web content so that it effectively communicates important information in an engaging way. Content checkpoints are recommended in seven main practice areas: • Write content for your customers, not for you • Organize your knowledge base • Layout your content for easy scanning • Carefully use rich media • Use the Answer editor properly • Maintain key content frequently • Create a style guide for your knowledge base
Email Marketing	This Tune-Up package contains our official guidelines that can help you achieve success with Email Marketing. Specific checkpoints in five main practice areas are included: • Design processes for your marketing efforts • Build your mailing lists the right way • Comply to international SPAM regulations • Make sure you reach the inbox • Design each mailing so that it is an excellent customer experience
Agent Desktop	This Tune-Up package contains our official guidelines for achieving a successful agent desktop deployment by ensuring that your agents can effectively interact with customers. Specific checkpoints in seven practice areas are included: • Track your interaction volumes by contact driver • Map contact drivers to interaction categories • Define logical processes for high volume categories • Integrate primary agent systems with the desktop • Implement optimized workflows for your logical business processes • Tailor workspaces for each agent group • Tune the knowledge base for agent use

Community Engagement	This Tune-Up package contains our official guidelines for helping to you to cultivate a successful online community. Specific checkpoints are included for five practice areas: • Make it easy to find • Properly organize your community • Specify policies for your community • Cultivate and reward good behavior • Continuously track the performance of your community

DEVELOPMENT SERVICES*

Task	Description
Web Self Service Appearance WSS Appearance defines the screen that end-users see when viewing the RightNow pages through a browser. Items such as accessing incidents, adding answers, viewing fields and accessing reports are changed here. The appearance of these pages contributes to the usability and quality of the implementation.	
HTML modifications	HTML modifications may include adding or changing page elements such as spacing, widths, images, text, etc.
CSS modifications	CSS modifications may be necessary when the page styling depends on Cascading Style Sheets (CSS) to manage colors, fonts, images, and other look and feel page elements.
Theme implementation	RightNow allows for the use of themes. A theme is a combination of images, HTML and CSS to manage a look and feel for a site. Themes are commonly implemented to manage branding on a single interface.
End-user Page Functionality End-user page functionality is “what” the pages do in terms of end-user interaction. The behavior of web forms, links, buttons and other on-screen elements define the functionality.	
Webform implementation	Design and implementation of custom webforms to be displayed on end-user pages. Webforms can collect data, trigger actions, or manage certain database items from a web browser.
Webform modification	Modification to the data collection or submission criteria of an existing Webform.
Integrations	
Integration adjustments	Adjustments may be made to existing integrations between RightNow and other systems, such as server references, data mappings, and other pieces that are subject to be modified during the lifecycle of an integration.
Data Management	
Data Import	Development of scripts to perform an import of data into the RightNow database from an outside source.
Data Export	Development of scripts to perform an export of data from the RightNow database into a flat file.
Data Cleanup	Development of a script to perform a purge of large

	amounts of expired or unneeded data to help maintain usability and performance.
Logging	Development of a custom script to record a system action, error, or behavior.
Miscellaneous	
Cron jobs	Development and implementation of a reoccurring system task (weekly imports, daily uploads, etc.).
External Event implementation	New, executable scripts that allows one to define actions and processes for interacting with other programs and databases. External events can be written to execute when an incident, answer, contact, or organization is created, updated, or deleted. See Answer ID 498
External Event modification	Updates and changes to existing external events.
General customization updates	Modifications to other customizations at the discretion of the Managed Services Delivery Manager.

Live Help On Demand Services

Task	Description
Click to Call Ability to turn a traditional telephony service into a smart interactive voice experience. It allows for fast, personal, interactive voice assistance to the targeted online customers exactly when they need it.	
Provide Administrative Tools Coaching	Learn how to administer the Live Help Webcare portal to add/remove/modify items such as: • Users and their settings • Operating hours/holiday hours • Surveys • Live Help Click to Call Button creation • Live Help Click to Call Rule creation
Provide Web Portal Rules Coaching	Learn how to administer the rules engine to precisely target customers and prospects with the right Click to Call invitation at the right time. Parameters for the rules can include items such as: • Page History • Page Count • Time on Page • Cart Value • Null Search Results • Page Abandonment
Define and create website page rules	The consultant will create Click to Call rules as per the business needs of the organization. Parameters for the rules can include items such as: • Page History • Page Count • Time on Page • Cart Value • Null Search Results • Page Abandonment
Establish call routing	Consultant will create a custom call route based on operating hours. This will allow calls to be routed to different contact centers based on time of day.

Create Click to Call links	Based on customer's requirements, the consultant will create Click to Call links, which include the following items: • contact center number • button image • operating hours
Design the Graphical User Interface (GUI)	Consultant will design/modify the Click to Call Graphical User Interface at the customer's direction.
Create customer Survey Window	Consultant will create a Click to Call survey that presents at the conclusion of a call.
Reporting Console Coaching	Learn what call reports are available and how to best utilize them.
Click to Call Agent Console Coaching	Contact Center Call Agents will learn how to utilize the Click to Call Agent Console when taking calls. Features such as Post Call Dispositions, Page Peek and dynamic variables will be shown.
Click to Chat A cross-channel, interactive allows site visitors to communicate with agents real-time for assistance with research, making a purchase, or obtaining service.	

Provide Administrative Tools Coaching	Learn how to administer the Live Help portals to add/remove/modify items such as:
	• Users and their settings
	• Operating hours/holiday hours
	• Surveys
	• Live Help Click to Chat button creation
	• Live Help Click to Chat rule creation
	• Click to Chat Department creation and features such as:
	    ○ Manual or automatic chat distribution
	    ○ Queue Thresholds
	    ○ Response Library

Provide Web Portal Rules Coaching	Learn how to administer the rules engine to precisely target customers and prospects with the right click to chat invitation at the right time. Parameters for the rules can include items such as: • Page History • Page Count • Time on Page • Cart Value • Null Search Results • Page Abandonment
Define and create website page rules	The consultant will create Click to Chat rules as per the business needs of the organization. Parameters for the rules can include items such as: • Page History • Page Count • Time on Page • Cart Value • Null Search Results • Page Abandonment
Create Click to Chat links	Based on customer's requirements, the consultant will create Click to Chat links, which include the following items: • button image

	• operating hours
	• Click to Chat Departments and their features such as:
	  ○ Manual or automatic chat distribution
	  ○ Queue Thresholds
	  ○ Response Library

Design the Graphical User Interface (GUI)	Consultant will design/modify the Click to Chat Graphical User Interface at the customer's direction.
Create customer Survey Window	Consultant will create a Click to Chat survey that presents at the conclusion of a chat.
Reporting Console Coaching	Learn what chat reports are available and how to best utilize them.
Chat Agent Console Coaching	Contact Center Chat Agents will be taught how to utilize the Chat Console when conducting the chats. Items such as Post Chat Dispositions, Page Peek and dynamic variables will be shown.
Email Used to easily handle large volumes of customer emails and Web forms to optimize customer interactions and reduce the cost of managing emails.	

Provide Administrative Tools Coaching	Learn how to administer the Live Help portal to add/remove/modify items such as:
	• Users and their settings
	• Operating hours/holiday hours
	• Email Department creation and features such as:
	  ○ Manual or automatic email distribution
	  ○ Queue Thresholds
	  ○ Response Library
	  ○ Auto Reply
	  ○ Incoming/Outgoing mail settings

Establishing Email Routing	Learn how to create/modify email routing rules to ensure that customer emails are directed to the correct skill set/group.
Reporting Console Coaching	Learn what chat reports are available and how to best utilize them.
Email Agent Console Coaching	Contact Center Email Agents will be taught how to utilize the Email Console when responding to the emails. Items such as Post Email Dispositions and auto-responses will be shown.

INTENT GUIDE MANAGED SERVICES

Task	Description
Consultancy	The consultant will: • Assist with design and execution of the plan for ongoing Intent Guide database optimization activities • Provide consulting guidance on Intent Guide application-related and process-related matters • Educate about how Intent Guide functionality can be used • Assist with quality assurance activities for the Intent Guide database • Assist with monitoring of results and offer suggestions for improvements • Assist with identification of what database content should be added, changed or deleted

VOICE MANAGED SERVICES

Task	Description
Not Included	

*Level of effort must be reviewed on all Development Service tasks to determine if a custom scope is required for successful implementation.