ORACLE®

Click-to-Call Cloud Service

Version 2014-04

Administrator's Guide

Oracle | ATG
One Main Street
Cambridge, MA 02142
USA

Oracle Click-to-Call Cloud Service Administrator’s Guide

Document Version

C2CCSAdminGuide, ver. 1.2

Copyright

Contents

1 Introduction

What Is Oracle Click-to-Call Cloud Service?

Click-to-Call is a part of the Oracle Live Help Cloud Service suite of applications that enables you to provide visitors to your website with a means of speaking to a representative for assistance. The visitor clicks on a link, provides a telephone number and a call is made connecting the visitor with a customer contact agent.

The visitor’s experience is customizable and Click-to-Call is the means by which you carry out the customization. Using Click-to-Call you can change the appearance of the link, specify different links to display based on criteria such as the visitor’s location, the time of day, the availability of agents, etc.

The only requirement for a visitor to use the Click-to-Call phone-to-phone service is the visitor’s phone number. Once this information is provided, an immediate phone connection is made between the Click-to-Call system and the visitor, using regular phone lines. There are no phone numbers to dial or extra phone lines needed to connect a web call. The phone number is sent to the application server, and the connection between the caller and the call agent or call center is established. Call agents then answer the phone just like any other call.

How To Use This Manual

Oracle provides this manual as a reference to administering and maintaining Click-to-Call functionality in your current environment.

For the purposes of this manual, it is assumed that your organization has an Oracle Live Help Cloud Service account and has purchased Click-to-Call services.

Cookies Used by Click-to-Call

This section describes the cookies used by Click-to-Call and details the contents of those cookies and what they are used for.

There are five cookies used by Click-to-Call. These are:

- *atgPlatoStop*: This is a session cookie does not contain any data. It is used as a flag to indicate to our servers that this website is not using Oracle Engagement Engine as the source for Rules for Live Help.
- *atgRecSessionID*: This is a session cookie that contains an opaque ID and is used to route requests to the correct web server.
- *atgRecVisitorID*: This is a persistent cookie that contains an opaque ID and is used to recognize a visitor across separate visits to your website.
- *fs_nocache_guid*: This is a persistent cookie that contains an opaque ID and is used to recognize a visitor across separate visits to your website.
- *fscookies*: This is a persistent cookie that stores encoded data used to configure the Click-to-Call GUI, to establish call connections, and to remember other information needed to support rules and reporting for Click-to-Call.

These cookies provide a means of determining whether a visitor has visited your website before but they do not provide any means of identifying the visitor.

If a visitor deletes persistent cookies after visiting your website, they are treated by Click-to-Call as a first-time visitor the next time they visit your website.

If a visitor does not allow their browser to accept cookies, they are still presented with links and can still use the Click-to-Call functionality, but the reporting around their call is affected as the cookies that track their behavior are not present on their browser.

Getting Started

In order to configure Click-to-Call within your organization you must log on to WebCare at https://webcare.estara.com.

Once you have logged on to WebCare, the menu options displayed are dependent on the services purchased by your organization and your access level within your organization. In order to access Click-to-Call configuration options, you must have administrator privileges.

How To Contact Oracle Support

If you have any questions or concerns regarding Engagement Engine Editor you can contact Oracle via the MyOracle Support website. The website is available at https://support.oracle.com.

2 Link Builder

The first step in enabling customers to avail of Click-to-Call functionality is to create a link that you can present to them. Link Builder is the application that enables you to create and manage Click-to-Call links for use on your website or on an email that you send to customers.

To start using Link Builder, select **Setup > Link Builder** from the WebCare menu.

What is a Link?

A link is an object that is displayed to a customer that enables that customer to initiate the Click-to-Call functionality.

A link can be either static or dynamic. A static link is one that is always displayed and the code to display it is included in the page source code or through a rule that always evaluates as true in the Engagement Engine. A dynamic link is one that is only displayed after the evaluation of a Rule. This evaluation can be performed either by the Engagement Engine or by Webcare Rule Builder.

There are four different types of links that are currently supported by Link Builder. These are:

- Web – This is a link displayed to a customer visiting your website. It is used either in conjunction with `DIV` objects or with static code to provide an exact position on the visitor’s screen.
- Email – This is a link that can be displayed in an email to a customer. As it contain no JavaScript, it can also be used as an alternative to Web links if third-party JavaScript is not allowed on your website.
- Hover – This is a link that is used in conjunction with either Rule Builder or with Oracle Engagement Engine to determine the positioning and timing of the link’s appearance on the page.
- Timeout – This is a specific type of hover link that displays when the visitor has been on the same page for a pre-determined length of time.

Note: There is also an obsolete type of link called an exit link. Exit links are no longer supported by Click-to-Call.

Opening Link Builder

Once you have selected Link Builder from the **Setup** menu, WebCare displays the Link Builder welcome screen.

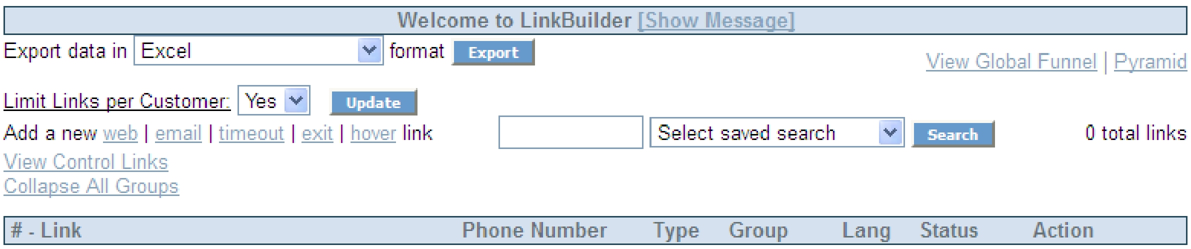

Figure 1 – Link Builder welcome screen

Create a New Link

This section provides instructions on how to create a new link using Link Builder. It provides details about each of the fields available during the creation process. Some of these fields are not presented for all types of link, and the instructions will highlight fields where this is the case.

1. Open Link Builder by selecting **Setup** > **Link Builder** from the WebCare menu.
2. Select which type of link to create by clicking on the appropriate hyperlink in the **Add a new web/email/timeout/exit/hover** link.

   Note: Although you can still select to create a new Exit link, these links are no longer supported by Click-to-Call.

   This opens the Link Customization page**.**
3. Once the Link Customization page displays, enter the following information:
   - **Link Name**: This is a required field where you must provide a unique name for this link. This name is what appears on the Link Builder page.
   - **Link Type**: This is a required field where you can specify what type of link you are creating. This is pre-populated with the type of link you clicked on to open the Link Customization page.
   - **Email Link Type**: This is a required field for email links only. You can use it to specify whether the link is displayed as text or an image within the email.
   - **Language**: This is a required field where you specify the language in which you wish to display the call window.
   - **Phone Number**: This is a required field where you specify the telephone number to which calls initiated via the link are routed. You must select the country of the destination phone number from the dropdown. This automatically provides the

international dialing code for that country, and you must provide the destination phone number in the text box.

Note: If you select Italy as the destination country, you must define the correct dialing prefix by including a 0 at the start of the destination telephone number if the number refers to a landline. Any Italian destination telephone numbers that do not start with a 0 will be treated as a call to a mobile number.

- **Extension**: This is an optional field where you can provide further information if the destination telephone number calls an Interactive Voice Response (IVR) system. By entering a series of characters you can route the call to the appropriate destination. Valid characters for this field are digits, star (*), pound (#), comma (,), and period (.). The comma represents a two-second delay and the period suppresses audio messages while routing the call.
- **UI Title**: This is an optional field where you specify the title that is displayed in the browser title bar for this link. This title is displayed on every page of the GUI. If nothing is entered, the Link Name is displayed.
- **HTTPS Link**: This is an optional field where you specify whether the link is used on a secure HTTP page. It is preferable to use a HTTPS link rather than a HTTP link as it prevents the user receiving a message telling them they are navigating away from or onto a secure page.

  Note: If you select ‘Yes’ for this option, all images displayed on the page must reside on a secure page.
- **Talk by PC**: This feature is no longer available and this field should be left with the default values.
- **IVR**: This field is only available if **Talk By PC** has been selected. The Talk By PC feature is no longer available and this field should be left with the default value.
- **Reporting Vars**: These are optional fields where you can specify which reporting variables you wish to track for each call. This data is passed to your reports once the call has completed.

  Reporting variables, sometimes referred to as Optional Data Fields, allow you to collect any data you want to keep about individual calls or look at in aggregate.

  The reporting variables may be populated either statically or dynamically. To statically populate a reporting variable, you can enter values in the **Reporting Vars** fields. To populate the variables dynamically you must use Oracle Engagement Engine. For more information on Oracle Engagement Engine, please contact your Oracle Live Help Implementation Specialist.

  Link Builder allows you to specify up to three reporting variables (Var 1, Var 2, and Var 3) which will be passed statically for each link. Each of these can accept up to 128 characters.

  You can configure a total of 10 possible variables to use as a reporting variable by selecting **Reporting > Setup > Edit Reporting Variable Names** from the WebCare menu.

  For further information on using reporting variables, please contact Oracle Live Help Customer Support.

- **Title Variable**: This is an optional field where you can specify which, if any, of the reporting variables should be populated with the title of the page.
- **Link Icon**: This is a required field where you can specify which image to use for the link. You can choose from the default images provided by clicking on the image displayed or by clicking on the **Choose a different image** link and selecting the image you desire. Default images are available in English, French, Greek, Portuguese, and Spanish.

  Alternatively, you can upload a link of your own design by clicking on the image displayed or the **Choose a different image** link and selecting the **Custom URL** option. You must then provide a URL for the image you wish to use and click on the **Upload/choose custom icon** link.

  Once you have selected your desired image, click the **Change** button to confirm your choice and return to the Link Customization screen.
- **Debug**: This is a required field for Hover and Timeout links only. You can use it to identify what level of debugging you wish to use with this flag. This field has a default value of 0.

  Note: Please contact your Oracle Live Help Implementation Specialist for more information about using the debugging feature.
- **Debug IP Match**: This is an optional field where you can provide a RegEx to identify whether debugging should be used. Debugging will only be activated if the visitor's IP matches the RegEx provided. We recommend that you leave this field blank.

  Note: Please contact your Oracle Live Help Implementation Specialist for more information about using this feature.
- **Mouseover Icon**: This is an optional field for Hover and Timeout links where you can specify a URL for an image that will replace the link image when the mouse is moved over the image. The image must be the same width and height in pixels as the original image.
- **Custom URL**: This is an optional field for Hover and timeout links where you can specify a URL to call to display a 'Before You Go' style message to the visitor.

  Note: Please contact your Oracle Live Help Implementation Specialist for more information about using this feature.
- **Custom Off URL**: this is an optional field for Hover and Timeout links where you can specify a URL to call to display a 'Before You Go' style message to the visitor when your customer contact center is set to 'closed' or 'off' according to the Operating Hours Set in use.

  Note: Please contact your Oracle Live Help Implementation Specialist for more information about using this feature.
- **Custom Features**: This is an optional field for Hover and Timeout links where you can specify the features for the window in which the webpage identified in the **Custom URL** field opens.

  Note: Please contact your Oracle Live Help Implementation Specialist for more information about using this feature.

- **Positioning**: This is a required field for Hover and Timeout links where you specify the position of the top left corner of the link.
- **Minimum Window Size**: This is an optional field for Hover and Timeout links where you can specify the minimum dimensions of the browser window if a link is to be displayed.
- **Relative to Layer ID**: This is an optional field for Hover and Timeout links. If you wish to use the link in a static position, you can make it relative to the Layer ID specified in this field.

  For example, if you create a `DIV` object called C2Coffer, then you could enter that name in this field and the link will display relative to the DIV object.

  Note: If you enter a value in this field, it will override any selection made about whether the position is relative to the page or window in the **Positioning** field.
- **Z-Index**: This is a required field for Hover and Timeout links where you can specify the CSS z-index property of this link. This is important in determining the render order of the link and any other HTML elements on the page. This field has a default value of 1,000.

  Note: Due to the complex nature of some links, Oracle reserves the right to use z-index values up to 100 higher than the value provided in this field. For example, if this is set to 1,000, Oracle may use z-index values between 1,000 and 1,100 when rendering this link.
- **In a Window**?: This is a required field for Hover and Timeout links where you specify whether or not to display the link in a window which the visitor can close. The default value for this field is ‘No’.
- **Display**: This is a required field for Hover and Timeout links where you specify what to display for the link. The options available are:
  - **Button**: This displays a button that opens the Click-to-Call GUI when clicked.
  - **GUI**: This displays the GUI directly onto the page.
  - **Imagemap**: This displays a client-side imagemap.
- **Close After Click**: This is a required field for Hover and Timeout links where you specify whether or not the layer is closed after the visitor clicks on the button or imagemap. The default value for this field is ‘No’.
- **Show When Off Or Closed**: This is a required field for Hover and Timeout links where you can specify whether or not the link is displayed when it is in an Off or Closed state. If you select ‘Yes’ the Off or Closed links specified in the Advanced Features section will be shown as appropriate. The default value for this field is ‘No’.
- **Button Shown URL**: This is an optional field for Hover and Timeout links where you can specify a URL that is loaded when the button is displayed. The value entered must be either an image URL, a .js file URL, or a JavaScript call starting with `JavaScript`.

  You must ensure you use the img src between the NOSCRIPT tags. The URL is called by the customer’s browser via an IMG SRC= tag. The following additional information is appended to the URL:

`varx=x` (The link's `varx` data value where x can be 1-10)

`Callstate=buttonshown` (Identifies what action has occurred)

Note: If using WebEvents within this field, the WebEvent's variable inherits the call's variable fields.

- **GUI Loaded URL**: This is an optional field where you can specify a URL that is called when the GUI is displayed. The value entered must be either an image URL, a .js file URL, or a JavaScript call starting with `JavaScript`.

  You must ensure you use the img src between the NOSCRIPT tags. The URL is called by the customer's browser via an IMG SRC= tag. The following additional information is appended to the URL:

  `jscallid=x` (A number that uniquely identifies the call)

  `varx=x` (The link's `varx` data value where x can be 1-10)

  `Callstate=guiloaded` (Identifies what action has occurred)

  Note: If you want variable data to be passed dynamically, you must use the webVoicePop() JavaScript call as shown below:

  Example 1;

  ```
  webVoicePop('Template=1022','webeventguiloaded=http://as00.esta
  ra.com/webcare/webevents/webevent.php?accountid=youraccountid&T
  emplate=1022','var1=var1data','var2=var2data');
  ```

  Example 2;

  ```
  webVoicePop('Template=1022','var1=var1data','var2=var2data');
  ```

  These two examples function identically if the field is populated with http://as00.estara.com/webcare/webevents/webevents.php?accountid=youraccountid&Template=1022.

  Note: If using WebEvents within this field, the WebEvent's variable inherits the call's variable fields.

- **User-Side Call Started URL**: This is an optional field where you can specify a URL to load when a visitor requests that a call is made. The value entered must be either an image URL, a .js file URL, or a JavaScript call starting with `JavaScript`.

  This is less reliable than the **Server-Side Call Started URL** field as it won't be loaded if the GUI is closed, but it does enable you to pass the visitor's cookies.

  You must ensure you use the img src between the NOSCRIPT tags. The URL is called by the customer's browser via an IMG SRC= tag. The following additional information is appended to the URL:

  `jscallid=x` (A number that uniquely identifies the call)

  `varx=x` (The link's `varx` data value where x can be 1-10)

  `Callstate=callstarted` (Identifies what action has occurred)

  Note: If you want variable data to be passed dynamically, you must use the webVoicePop() JavaScript call as shown below:

Example 1;

```
webVoicePop(‘Template=363’,’usercallstartedurl=http://as00.esta
ra.com/webcare/webevents/webevent.php?accountid=youraccountid&T
emplate=1022’,’var1=var1data’,’var2=var2data’);
```

Example 2;

```
webVoicePop(‘Template=363’,’var1=var1data’,’var2=var2data’);
```

These two examples function identically if the field is populated with http://as00.estara.com/webcare/webevents/webevents.php?accountid=youraccountid&Template=1022.

Note: If using WebEvents within this field, the WebEvent’s variable inherits the call’s variable fields.

Note: Please contact your Oracle Live Help Implementation Specialist for more information about using this feature.

- **Prohibit Mobile Phones**: This is a required field where you can specify whether to prohibit calls if the customer enters a mobile phone number. By default this is set to ‘No’.

In addition to these fields, you can enter some additional information to fine tune your call link configuration by clicking on the **Show Advanced Features** button at the bottom of the page. In addition to displaying additional fields, the Show Advanced Features button adds two sections to the Link Customization page. These sections are called **Button Visibility** and **Value Added Services**. These sections group related fields to aid in customizing the link.

The fields that are displayed by the Show Advanced Features button are:

- **Group Name**: This is an optional field where you can assign this link to a group. The list of links displayed on the Link Builder welcome page can be filtered by group name.
- **GUI**: This is an optional field where you can specify the pop-up User interface to display when the customer clicks on the link presented.
- **PC to Phone ANI Display**: This field relates to the deprecated Pc-to-Phone functionality and should be left blank.
- **Phone to Phone ANI Display**: This is an optional field where you can specify the caller-ID to display to the agent for a Phone-to-Phone call. For the US, this must be a 10-digit number. If it is longer than 10 digits, only the last 10 digits will be used. Internationally, the requirements for this field vary from country to country, but the number used should be a valid telephone number.

  Note: All requests to change the number displayed must be tested individually as carrier rules vary and some may not work as required.

  If you check the **Unique for each user?** check box then the system assigns a unique number for that is then associated to all calls from the customer’s computer. You may need to configure your IVR or automatic call distributor (ACD) to pass these numbers along, as they may otherwise be flagged as invalid numbers. The numbers must be passed through for synchronization to work with agent tools such as the Live Calls API and the Agent Console.

The **Button Visibility** section contains the following additional fields that you can configure:

- **Percentage Shown**: This is a required field where you can specify how often the button is displayed. By default this is set to 100%. This field is most commonly used when a link is first launched as it enables you to slowly ramp up how often it is displayed.
- **Link Off/On**: This is a required field where you can turn a link on or off. If it is set to 'Off', the system will display the Off Link Icon if one is specified. If no Off Link Icon is specified then the link is hidden from visitors.
- **Off Link Icon**: This is an optional field where you can specify the link to display to visitors if a link is set to 'Off'. You can choose from the default images provided by clicking on the image displayed or by clicking on the **Choose a different image** link and selecting the image you desire.

  Alternatively, you can upload a link of your own design by clicking on the image displayed or the **Choose a different image** link and selecting the **Custom URL** option. You must then provide a URL for the image you wish to use and click on the **Upload/choose custom icon** link.

  Once you have selected your desired image, click the **Change** button to confirm your choice and return to the Link Customization screen.
- **Link Operating Hours**: This is a required field where you can specify which set of operating hours to use to determine when your customer contact center is open. The default value for this field is 'All Hours'. For more information on creating an Operating Hours set, please refer to the Operating Hours section of this document.

  You can view an on-screen representation of an Operating Hours set by clicking on the View link beside this field. This displays a pop-up window showing when the customer contact center is available.
- **Closed Link Icon**: This is an optional field where you can specify which icon to display when the customer contact center is closed. You can choose from the default images provided by clicking on the image displayed or by clicking on the **Choose a different image** link and selecting the image you desire.

  Alternatively, you can upload a link of your own design by clicking on the image displayed or the **Choose a different image** link and selecting the **Custom URL** option. You must then provide a URL for the image you wish to use and click on the **Upload/choose custom icon** link.

  Once you have selected your desired image, click the **Change** button to confirm your choice and return to the Link Customization screen.
- **Max Simultaneous**: This is an optional field where you can specify the maximum number of simultaneous calls that may be active at any time. If a caller attempts to view the GUI after this number is reached, the system displays a closed message with 'Please try again later'.

The **Value Added Services** section displays the following additional fields that you can configure:

- **Link Route**: This is a mandatory field that is only available if link routes have been defined using Link Router. You can use it to specify what link route should be associated with this link. The default value for this field is 'None'.
- **User-Side Termination URL**: This is an optional field where you can specify a URL to load when a call terminates. The value entered must be either an image URL, a .js file URL, or a JavaScript call starting with `JavaScript`.

  This is less reliable than the **Server-Side Termination URL** field as it won't be loaded if the GUI is closed, but it does enable you to pass the visitor's cookies.

  The URL is loaded via the visitor's browser.

  You should only use this field if you require an external count of your completed calls, otherwise this information is already available through WebCare reports.

  Note: If you want variable data to be passed dynamically, you must use the webVoicePop() JavaScript call as shown below:

  Example 1;

  ```
  webVoicePop('Template=1022','usertermination_urlurl=http://as00
  .estara.com/webcare/webevents/webevent.php?accountid=youraccoun
  tid&Template=1022','var1=var1data','var2=var2data');
  ```

  Example 2;

  ```
  webVoicePop('Template=1022','var1=var1data','var2=var2data');
  ```

  These two examples function identically if the field is populated with http://as00.estara.com/webcare/webevents/webevents.php?accountid=youraccountid&Template=1022.

  Note: If using WebEvents within this field, the WebEvent's variable inherits the call's variable fields.

  Note: Please contact your Oracle Live Help Implementation Specialist for more information about using this feature.
- **Server-Side Call Started URL**: This is an optional field where you can specify a URL to load when a call is made. The value entered must be either an image URL, a .js file URL, or a JavaScript call starting with `JavaScript`.

  This is more reliable than the **User-Side Call Started URL** field as closing the GUI won't affect the functionality, but it cannot be used to pass the visitor's cookies.

  The URL is loaded via Oracle's servers.

  You must ensure you use the img src between the NOSCRIPT tags. The URL is called by the customer's browser via an IMG SRC= tag. The following additional information is appended to the URL:

  `jscallid=x` (A number that uniquely identifies the call)

  `varx=x` (The link's `varx` data value where x can be 1-10)

  `Callstate=callstarted` (Identifies what action has occurred)

  Note: If using WebEvents within this field, the WebEvent's variable inherits the call's variable fields.

Note: Please contact your Oracle Live Help Implementation Specialist for more information about using this feature.

- **Server-Side Termination URL**: This is an optional field where you can specify a URL to load when a call terminates. The value entered must be either an image URL, a .js file URL, or a JavaScript call starting with `JavaScript.`

  This is more reliable than the **User-Side Termination URL** field as closing the GUI won't affect the functionality, but it cannot be used to pass the visitor's cookies.

  The URL is loaded via Oracle's servers.

  You should only use this field if you require an external count of your completed calls, otherwise this information is already available through WebCare reports.

  Note: If using WebEvents within this field, the WebEvent's variable inherits the call's variable fields.

  Note: Please contact your Oracle Live Help Implementation Specialist for more information about using this feature.

- **Agent Number Override URL**: This is an optional field where you can specify a URL which forces the system to check that URL to see if it returns a valid phone number. This is useful if you are using Contact Management software that maintains a list of valid generated numbers for a short time where the delay between connecting leg one and leg two of the call could mean that the obtained phone number for leg two of the call would no longer be valid.
- **Use Accessible C2C GUI**: This is an optional field where you can specify whether to use an accessibility mode for the Click-to-Call GUI. In accessibility mode, the floating `DIV` object that is used to enter an extension number as part of the phone number is **not** displayed. Additionally, the `DIV` that enables the customer to specify that the call will be answered by a receptionist is not displayed and this information defaults to 'No'.
- **Caller Audio:** This is an optional field where you can specify the URL of a wave file to play as the leg one message. We recommend you keep this message brief as it must be played in full before the caller is connected. If you have a default caller audio, you can override it by entering '0' or ''none' in this field.
- **Destination Audio:** This is an optional field where you can specify the URL of a wave file to play as the leg two message. We recommend you keep this message as brief as possible as the customer is waiting on the line at this stage. If you have a default destination audio, you can override it by entering '0' or ''none' in this field.
- **Show Pre-Splash Pages:** This is an optional field where you can specify whether or not to display a pre-splash page to the visitor. This page can be used to ask the visitor questions, or to provide the visitor with additional information.
- **Pre-Splash Page Validate URL:** This is an optional field where you can specify the URL to call once the visitor is finished with the pre-splash page. All of the parameters that would be passed to the GUI will be passed to this URL, so you can use this URL to validate any information the customer has provided before calling the main GUI.

- **Pre-Splash Page Custom URL:** This is an optional field where you can specify the URL for a pre-splash pop-up to which the following parameters are passed:
  - wvget – Get parameters
  - wvpost – Post parameters
  - wvurl – Click-to-call action URL
  - wvsplashurl – Custom URL

  Note: This field should be left blank if 'Translations PrePop' is being used.

4. Once you have finished configuring the link on the Link Customization page, click on the **Add Link** button at the bottom of the page.
5. The Link Created page displays and shows you what your link will look like when it is displayed to a visitor.

   This page also displays two code snippets that should be added to any page where you wish to display the link. The first code snippet must be included in the <HEAD> section of your web page and the second code snippet should be placed where you wish the link icon to appear on your web page.

   Note: You should NOT use this code snippet if you are making this link available through the Engagement Editor or WebCare Rule Builder.

   Note: You can return to the Link Builder welcome screen at any time and click on the icon to get the HTML code for the link you created.
6. Save the page to your site and it is now available for use with the link included. Visitors can now be connected to the phone number you have designated for this link.
7. Click on **Create Another Link** to open a Link Customization window for a new link, or click on **Finish** to return to the Link Builder welcome screen.

Edit a Link

This section provides instruction on how to edit an existing link using Link Builder.

1. Open Link Builder by selecting **Setup > Link Builder** from the WebCare menu.
2. Use the search capabilities to search by link number or link name. Search results return all saved links that contain all of your search words.
3. Once you locate the link you wish to edit, use one of the following methods to open the Link Customization window:
   - Click the link name.
   - In the Actions column, click the **Edit the Link** icon.
3. On the Link Customization window, make your desired changes to the Link Customization fields. A full description of each field can be found in the Creating Links section of this document.

4. Once all your changes have been made, click the **Update Link** button at the bottom of the page.

5. The Link Created page displays and shows you what your link will look like when it is displayed to a visitor.

   This page also displays two code snippets that should be added to any page where you wish to display the link. The first code snippet must be included in the <HEAD> section of your web page and the second code snippet should be placed where you wish the link icon to appear on your web page.

   Any pages that are already configured to display this link will automatically display the updated link without any further modification.

   Note: You should NOT use this code snippet if you are making this link available through the Engagement Editor or WebCare Rule Builder.

   Note: You can return to the Link Builder welcome screen at any time and click on the icon to get the HTML code for the link you created.

6. Click on **Edit This Link** to return to the Link Customization page for this link and make further changes, or click on **Create Another Link** to open a Link Customization window for a new link, or click on **Finish** to return to the Link Builder welcome screen.

Delete a Link

This section provides instructions on how to delete a link using Link Builder.

1. Open Link Builder by selecting **Setup > Link Builder** from the WebCare menu.

2. Use the search capabilities to search by link number or link name. Search results return all saved links that contain all of your search words.

3. Select More > Delete from the menu on the right hand side of the row containing the link you wish to delete.

4. Select **Yes** when the message window displays asking if you are sure you wish to delete this link. You can select No to return to the Link Builder welcome screen without deleting the link.

Note: You should take care not to delete any links that are called by a Rule within Oracle Engagement Engine, as doing so could cause your site to fail. If you do delete a link referenced by a Rule in Engagement Engine, then this is highlighted the next time the Engagement Engine Editor is opened, and any Sites associated with the Rule will have to be re-published once the Rule has been edited to remove the reference to the deleted link.

If you must delete a link used by a Rule in Engagement Engine it is recommended that you first edit the Rule to remove any reference to the link you wish to delete in order to avoid any problems on Sites associated with that Rule.

3 Link Router

What is Link Router?

A link route is a method of directing calls to different destinations using a single link. The destination is determined from geographic location of the caller and the time of day that the call is taking place. For example, from a single Click-to-Call button on your web page you can route a call to a US or European call center depending on which country the caller is calling from, or you can route a call to your East or West Coast customer contact center based on the time of day.

Link Router provides you with the means of defining and managing the rules used to determine how a call should be routed.

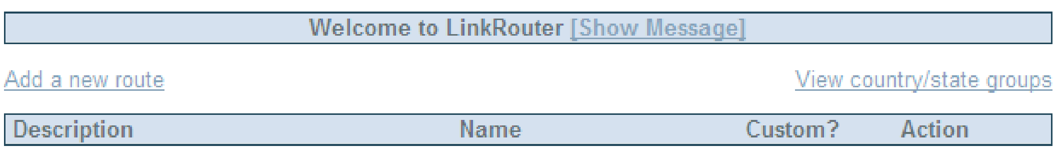

Figure 2 – Link Router welcome screen

You can access Link Router by selecting **Setup** > **Link Router** from the Webcare menu.

Create a New Link Route

This section provides instructions on how to create a new link route using Link Router. It provides details about each of the fields available during the creation process.

1. Open Link Router by selecting **Setup** > **Link Router** from the WebCare menu.
2. Click the **Add a new route** link.
3. Once the Route Information screen displays, enter the following information:
   - **Description**: This is a mandatory field where you can provide a description of the link route. This field also serves as the name of the link route and is how the route is listed in the Link Router welcome screen.

- **Custom Route?**: This is a mandatory field that is used to specify whether the link route you are creating is a custom route or not. If it is, then you must provide an entry in the **Custom URL** field. This field defaults to a 'no' value.
- **Custom URL**: This is an optional field where you can specify what URL you wish to use for your custom route. You only need to enter a value if you select 'Yes' in the **Custom Route?** field.
- **Closed Message**: This is an optional field where you can specify a message to display to visitors if the customer contact center to which they would normally be directed is closed.
- **Closed Message: Emails**: This is an optional field where you can specify a comma-separated list of email addresses which will receive a message typed in by the visitor if they click a link when the customer contact center is closed. If no email addresses are provided here, the customer may still enter a message and it will be stored within WebCare.
- **Closed Message: Subject**: This is an optional field where you can specify the Subject line of the email that is generated from the message entered by the customer if they click on a link when the customer contact center is closed.
- **Closed Message: From Name**: This is an optional field where you can specify From name displayed on the email that is generated from the message entered by the customer if they click on a link when the customer contact center is closed.
- **Closed Message: From Email**: This is an optional field where you can specify From email address displayed on the email that is generated from the message entered by the customer if they click on a link when the customer contact center is closed.

4. Once you have finished configuring the link route, click **Add Route** to save the link route and return to the Link Router welcome screen. You can also click **Cancel** to return to the Link Router welcome screen without saving the link route.
5. If you are creating a non-custom link route you must choose the defaults to associate with the link route. Click on the Description or Name of the link route to open the Route Listing window. You can use this to provide the routing information for non-custom link routes. You can add multiple route listings for a route. These are used so that you can display the same link to visitors from various countries and if they click on the link they will be automatically directed to the appropriate destination number.
6. When the Route Listing window opens, click on the **Edit** link in the Default listing. This enables you to provide a default destination number if the visitor does not meet the criteria of any of the other route listings. You should select the country of the default destination number from the dropdown and provide the default destination number and then click the Update link.

   Note: If you provide a blank number as the default number then the closed message will be displayed by any link using this link route if a matching link route/hour set cannot be found.
7. Once a default number has been provided you can then create the route listings for other locations. Select a country from the Select Country/Group dropdown list.
8. Select a country for the destination number for this link route.

9. Provide a destination phone number for the link route. The international dialling code is prefilled depending on the country selected as the destination country.
10. Click the **Add** link. This route listing is now available.
11. If you need to add an Operating Hours set for the route listing, you can do that by clicking the **Add hour set** link once the route listing has been created. For more information on Operating Hours, please refer to the Operating Hours section of this document
12. You can add as many separate route listings as you like by following steps 7-10. Once you have finished adding route listings, you can test your route listings by clicking on the **Test route** link. This opens the Test Link Route window where you can enter the caller's phone number and the date and time you wish to simulate the call taking place. This will then apply the route listings detailed in the Route Listing window to identify what route listing should be applied. The results are displayed in a text box that shows what steps were taken during the test.
13. Once you are satisfied that your link route works as desired, click on the **Back to route list** link to return to the Link Router welcome screen..

Associate a Link With a Link Route

Once you have created a link route you need to associate it with a link in order for it to have any effect. To associate a link with a link route, follow the procedure described here:

1. Open Link Builder, by selecting **Setup** > **Link Builder** from the Webcare menu.
2. Find the link you want to associate with the link route and either click on the link name in the table, or click the **Edit the Link** icon.
3. Click on the **Show Advanced Features** button at the bottom of the Link Customization page.
4. In the **Value Added Services** section, click on the drop-down list in the **Link Route** field and select the link route you wish to associate with this link.
5. Click the **Update Link** button. Any pages that use this link will now use the associated link route to determine the destination number for a visitor who clicks on the link.

An Example Link Route

This section will provide an example link route. The example will be fairly simple, but will show the flexibility and power that a link route provides. The example shows how to create a link route to multiple destinations based on operating hours sets. In this example there are three different Operating Hours sets, two different numbers that are called depending on when the call is made, and a closed message that is displayed when the customer contact center is closed.

The instructions detailed give details on how to create such a link route. These instructions are for example purposes only and the particular details of any link route you create will need to be altered to match your requirements.

1. Go to **Setup** > **Operating Hours** and create the following Operating Hours sets:
    - Standard Hours (9:00 AM – 5:30 PM)

- After Hours (5:30 PM – 8:00 PM)
- Closed Hours (8:00PM – 9:00 AM)

For more detail on how to create an Operating Hours set, please refer to the Operating Hours section of this document.

2. Go to **Setup > Link Router**.
3. Click on the **Add a new route** link.
4. Type 'Standard and After Hours' in the **Description** field.
5. Click on 'Standard and After Hours' in the list of link routes.
6. Click on the **Edit** link in the Default row of the table on the Route Listing window.
7. Click on the **Update** link without entering any destination number details. This indicates that the closed message should be displayed if a matching link route/operating hours set could not be found.
8. Select **Default for Phone to Phone** from the Select country/group dropdown list.
9. Click on the **Add** link in this row.
10. Click on the **Add Hour Set** link for the Default for Phone to Phone route listing.
11. Select 'Standard Hours' from the dropdown list of Operating Hours sets.
12. Enter a country and a destination telephone number.
13. Click on the **Add** link for the route listing.
14. Click on the **Add Hour Set** link for the Default for Phone to Phone route listing.
15. Select 'After Hours' from the dropdown list of Operating Hours sets.
16. Enter a country and a destination telephone number.
17. Click on the **Add** link for the route listing.

If you followed this process you have now created a link route that directs visitors to one destination number during the defined 'Standard Hours' set, another destination number during the defined 'After Hours' set, and displays a closed message if they try to call at any other time.

Any link associated with this link route will now follow this behavior pattern.

Edit a Link Route

There are two types of edit that can be made to a link route. These are:

1. Changes to the link route information: By clicking on the **Edit** link in the Action column for a link route you can change the following fields:
    - Description

- Custom route?
- Custom URL
- Closed Message
- Closed Message: Emails
- Closed Message: Subject
- Closed Message: From Name
- Closed Message: From Email

  Once you have finished making the required changes to these fields, click on the Update Link Route button to save the changes and return to the Link Router welcome screen. You can also click Cancel to return to the Link Router welcome screen without saving any changes you have made.

2. Changes to the route listing details for a link route: By clicking on the Description or Name of a link route you can:

- Add a new route listing
- Add a new Operating Hours set to an existing route listing
- Edit the destination phone number for a route listing
- Delete a route listing

Delete a Link Route

To delete a link route, click on the Delete link for the link route you wish to delete. When you are presented with the confirmation window asking if you are sure you would like to delete the link, click on the **Yes** button. You may also click on the **Cancel** button at this stage if you do not wish to delete this link route.

4 Operating Hours

What is Operating Hours?

Operating Hours is a tool by which you can create custom hour sets that defines when your customer contact center is open or closed. Any Operating Hours sets you create may then be used by other applications such as Link Builder, Link Router or Engagement Engine to help define behavior within the defined Operating Hours set.

You can access the Operating Hours application by selecting **Setup** > **Operating Hours** from the WebCare menu.

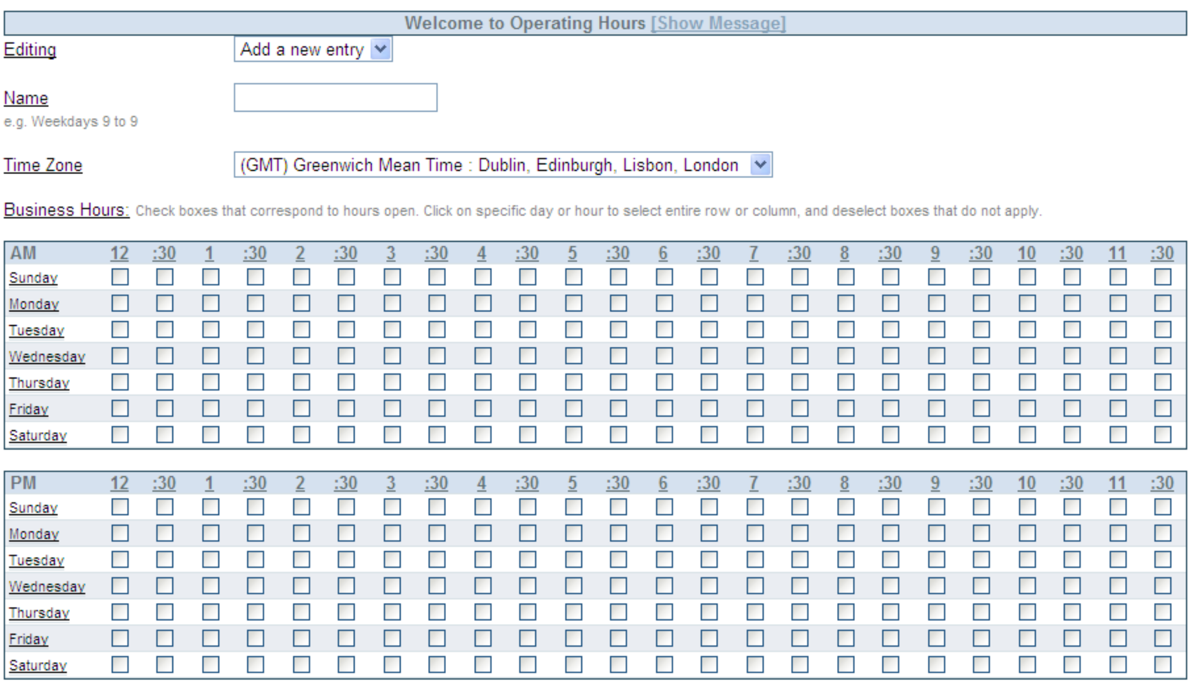

Figure 3 – Operating Hours welcome screen

Create an Operating Hours Set

This section provides instructions on how to create a new Operating Hours set using the Operating Hours application.

1. Open the Operating Hours application by selecting **Setup** > **Operating Hours** from the WebCare menu.
2. Type a name for the Operating hours set in the **Name** field. You should try and make the name meaningful as this is how the hour set will be identified by any other applications that use Operating Hours sets.
3. Specify a time zone from the **Time Zone** dropdown list.
4. In the Business Hours section, check the boxes that match the hours of operation for the hour set you are creating. You can click on a specific day or time to check all of the boxes in that row/column.

   Note: Each check box represents a half-hour increment, so selecting the 8:00 AM box you are saying that the customer contact center is open from 8:00 AM to 8:29 AM.
5. Provide a value for the **Padding Before** and **Padding After** fields. These allow you to fine tune your hours sets. For example, if your hour set ends at 5:30 PM each day and you set **Padding After** to 15 minutes then this means that the hour set will treat your customer contact center as being open until 5:45 PM each day.

   Note: This feature adds the specified time on to the start or end of the checked boxes each time it comes to the start or end of a group of checked boxes. For example, if you set Padding After to 15 minutes as your customer contact center closes at 5:45 PM each day and you have not checked the boxes between 1:00 PM and 2:00 PM every day as the customer contact center is closed for lunch, then the Padding After field will also add 15 minutes between 1:00 PM and 1:14 PM as the group of checked boxes ends with the 12:30 PM box.
6. Use the Days Off section to designate holidays for your customer contact center. You can either select a specific date (e.g., January 1 of every year) or a combination of week, day and month to indicate a day off (e.g., First Wednesday of April). When you have selected a day, click on the **Add** button to add that day to the Day Off list.
7. The **Closed Message** field allows you to specify a message to display to a user if they click on a link when the customer contact center is closed.
8. The **Closed Message: Emails** field allows you to specify a comma-separated list of email addresses which will receive a message typed in by the visitor if they click a link when the customer contact center is closed. If no email addresses are provided here, the customer may still enter a message and it will be stored within WebCare.
9. The **Closed Message: Subject** field allows you to specify the Subject line of the email that is generated from the message entered by the customer if they click on a link when the customer contact center is closed.
10. The **Closed Message: From Name** field allows you to specify the From name displayed on the email that is generated from the message entered by the customer if they click on a link when the customer contact center is closed.

11. The **Closed Message: From Email**: field allows you to specify the From email address displayed on the email that is generated from the message entered by the customer if they click on a link when the customer contact center is closed.
12. Click on **Add** once you have entered all the required details for your operating Hours set. You can also click on **Check Available** to see if the Operating Hours set you created would show as available now.

Edit an Operating Hours Set

This section provides instructions on how to edit an existing operating Hours set.

1. Open the Operating Hours application by selecting **Setup** > **Operating Hours** from the WebCare menu.
2. Select the Operating Hours set you wish to edit from the **Editing** dropdown list.
3. Make the required updates to the fields that need changed.
4. Click the **Update** button to save your changes. You can also click on **Check Available** to see if the Operating Hours set you created would show as available now.

Delete an Operating Hours Set

This section provides instructions on how to delete an Operating Hours set.

Note: Care should be taken when deleting an Operating Hours set, as deleting an Operating Hours set that is used by a link currently displayed on your website, or is referenced by an Engagement Engine Rule may cause that link or Rule to behave in an unexpected manner.

1. Open the Operating Hours application by selecting **Setup** > **Operating Hours** from the WebCare menu.
2. Select the Operating Hours set you wish to delete from the **Editing** dropdown list.
3. Click the **Delete** button to delete this Operating Hours set.

   Note: There is no confirmation message asking if you are sure you wish to delete this Operating Hours set, so you must ensure that you wish to delete this Operating hours set as it cannot be recovered once deleted.