



Siebel In-Memory Next Best Action Guide

Siebel Innovation Pack 2014
November 2014

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1

What's New in This Release

What's New in Siebel In-Memory Next Best Action Guide, Siebel Innovation Pack 2014

Siebel In-Memory Next Best Action Guide, Siebel Innovation Pack 2014 documents the first release of this new product. [Table 1](#) lists the chapters in this guide.

NOTE: Siebel Innovation Pack 2014 is a continuation of the Siebel 8.1/8.2 release.

Table 1. New Product Features in Siebel In-Memory Next Best Action Guide, Siebel Innovation Pack 2014

Topic	Description
Chapter 2, "Overview of Siebel In-Memory Next Best Action"	Provides an overview of the Siebel In-Memory Next Best Action Integration Framework and the features that it provides.
Chapter 3, "Setting Up Siebel In-Memory Next Best Action"	Describes how to set up and configure the Siebel In-Memory Next Best Action integration.
Chapter 4, "Using Siebel In-Memory Next Best Action"	Describes how to work with Siebel In-Memory Next Best Action.

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Overview of Siebel In-Memory Next Best Action

This chapter provides an overview of Oracle's Siebel In-Memory Next Best Action. It includes the following topics:

- [About Siebel In-Memory Next Best Action on page 7](#)
- [Architecture of Siebel In-Memory Next Best Action on page 8](#)
- [Workflows for Siebel In-Memory Next Best Action on page 8](#)
- [About Cross-Channel Support Using Web Services on page 10](#)
- [About the Range of Recommendation Types on page 11](#)
- [About the Recommendations History Feature on page 12](#)

About Siebel In-Memory Next Best Action

Oracle's Siebel In-Memory Next Best Action is an integration framework between Siebel Business Applications and Oracle Real-Time Decisions that enables personalized, contextual, one-to-one recommendations across multiple channels. Siebel In-Memory Next Best Action replaces the Siebel Intelligent Offer Generation product, which is a Siebel Marketing application module. Siebel In-Memory Next Best Action makes the Siebel Call Center and Oracle Real-Time Decisions integration customizable and compatible with Oracle RTD version 11g. It provides an open, extensible, and configurable workflow-driven integration between Siebel Business Applications and Oracle RTD 11g.

Benefits of Implementing Siebel In-Memory Next Best Action

The following topic provides highlights of some of the functionality that Siebel In-Memory Next Best Action provides over previous iterations of the product.

One of the most important improvements that Siebel In-Memory Next Best Action provides is cross-channel support using Web services. These Web services allow information to be packaged in a format that can be used by different types of applications: mobile applications, Web applications, and point-of-sale applications. For more information, see ["About Cross-Channel Support Using Web Services" on page 10](#).

Another significant benefit of Siebel In-Memory Next Best Action is that in contrast to previous versions of Siebel Marketing applications that generated recommendations, Siebel In-Memory Next Best Action provides a range of recommendation types. In addition to Marketing Offers, which was the only type of recommendation previously provided, you can now generate Products and Loyalty Promotions recommendations, because these types are also now provided by default. Finally, Siebel In-Memory Next Best Action allows you to configure any type of recommendation. For more information, see ["About the Range of Recommendation Types" on page 11](#).

Finally, one major benefit of implementing Siebel In-Memory Next Best Action is that the Siebel In-Memory Next Best Action Response Action Framework allows organizations to initiate specific actions in response to how their customers respond to recommendations, and it provides a complete record of the recommendation history for each customer. For more information about the Siebel In-Memory Next Best Action Response Action Framework, see [“About Siebel In-Memory Next Best Action Response Action Framework” on page 12.](#)

Architecture of Siebel In-Memory Next Best Action

Figure 1 provides a high-level overview of how Siebel In-Memory Next Best Action integrates Siebel Business Applications with Oracle Real-Time Decisions.

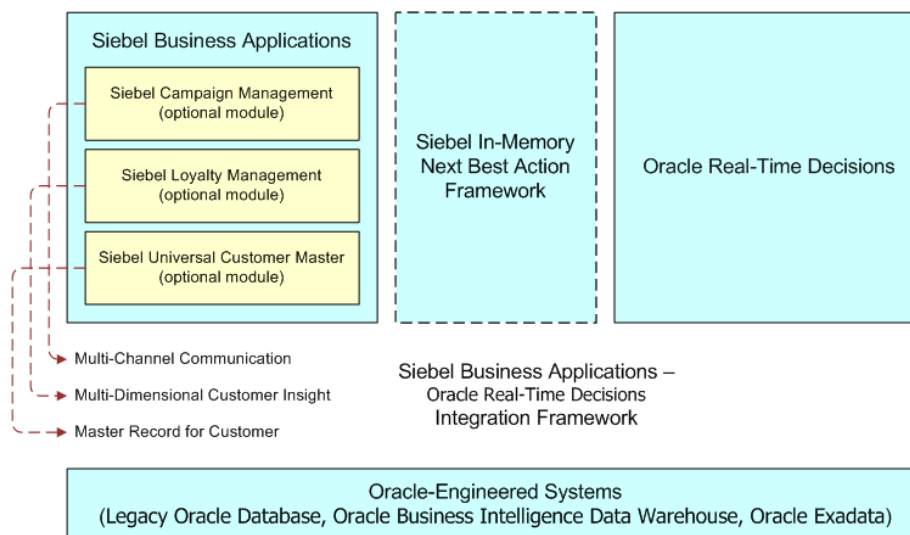


Figure 1. Architecture of the Siebel In-Memory Next Best Action Integration

Workflows for Siebel In-Memory Next Best Action

Siebel In-Memory Next Best Action architecture is open, extensible, and configurable. Organizations can use the default workflows that are provided with the product, and they can also configure workflows to customize the functionality according to their needs.

Siebel In-Memory Next Best Action provides the following default workflows:

- **RTD Advisor Workflow.** This workflow makes an Advisor call to Oracle Real-Time Decisions.

- **RTD Informant Workflow.** This workflow makes an Informant call to Oracle Real-Time Decisions.
- **RTD Interaction Workflow.** This workflow makes an end-to-end interaction call (both an Informant call and an Advisor call) to Oracle Real-Time Decisions.
- **RTD Process Response Action.** This workflow updates the responses in the Recommendation History screen within the Siebel application, informs Oracle Real-Time Decisions about the responses, and performs any predefined actions for the selected responses.

You can configure these workflows to fetch additional information before calling Oracle Real-Time Decisions. You can also modify these workflows and publish them as business services so that the application will call those instead of calling the default Web services. For more information about how to configure workflows, see *Siebel Business Process Framework: Workflow Guide* on the *Siebel Bookshelf*.

NOTE: The Siebel Bookshelf is available on Oracle Technology Network (<http://www.oracle.com/technetwork/indexes/documentation/index.html>) and Oracle Software Delivery Cloud. It might also be installed locally on your intranet or on a network location.

Siebel In-Memory Next Best Action enables organizations to retrieve data from external sources that are not available within a Web site or mobile application or within Siebel Business Applications.

Siebel In-Memory Next Best Action can fetch the following kinds of data from Siebel applications or from an external, third-party application:

- **Credit scores.** For example, if a financial institution needs to obtain information about a customer's credit-worthiness, then Siebel In-Memory Next Best Action can obtain this information from a third-party credit-reporting agency.
- **Billing information.** For example, Siebel In-Memory Next Best Action can obtain information about a customer's current balance.
- **Order status.** When the order management information is not available within the Siebel application, Siebel In-Memory Next Best Action can retrieve information about a customer's order.
- **Customer status or the lifetime score.** Siebel In-Memory Next Best Action can fetch information from a third-party application about a customer's status or about their lifetime score.

About Cross-Channel Support Using Web Services

The Web services provided with Siebel In-Memory Next Best Action enable the information that is requested by the calling application to be packaged in a format that can be used by different types of applications, such as mobile applications, Web applications, and point-of-sale applications. The Web services deliver valid responses along with the recommendations so that the calling application can provide accurate, flexible, and relevant responses. The Web services also enable a quicker response capture and a faster response time. If a recommendation is rejected, the Web service methods enable external applications to capture and send additional information so that better recommendations can be provided for future transactions. Finally, the Web service methods save the entire transaction: the recommendations provided, the responses, and any additional information that the customer provides.

Siebel In-Memory Next Best Action provides the following Web services methods to generate recommendations:

- **CallInformant.** This method enables external applications to send contextual information to Oracle Real-Time Decisions Server, such as the customer's name, contact ID, the details about the account, or the Web page that the customer was viewing. The CallInformant method passes messages that contain information about a specific unit in a business process to the RTD Informant inline service.
- **CallAdvisor.** This method enables external applications to request recommendations. It makes an Advisor call to the Oracle Real-Time Decisions Server, which processes input from a customer and returns recommendations based on that input. This method provides the available response choices for each recommendation type so that the application can display this information as buttons or in drop-down lists. This method also provides an image URL for each recommendation to be able to provide a picture of the product that is being recommended.
- **ProcessResponseAction.** This method enables external applications to send responses against the recommendations that the CallAdvisor Web service previously provided. It performs the following operations:
 - Updates the Recommendation History record with the selected response
 - Makes an RTD Informant call about the selected response
 - Performs any predefined actions for the selected response

Figure 2 shows how the Web service methods pass information between Siebel Business Applications and Oracle Real-Time Decisions.

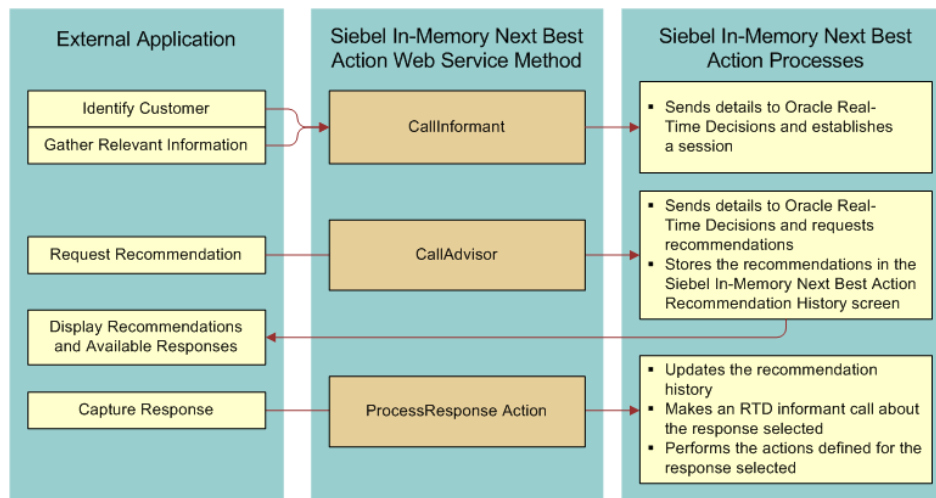


Figure 2. Siebel In-Memory Next Best Action Web Service Methods

External applications can call the Web services using their own logic and timing, which provides flexibility for the applications to control the customer interactions. For more information about the Web services provided for Siebel In-Memory Next Best Action, see *Siebel CRM Web Services Reference*.

About the Range of Recommendation Types

Siebel In-Memory Next Best Action provides the following default recommendation types:

- Marketing Offers
- Products
- Loyalty Promotions

However, you can also configure any type of recommendation, and this ability to configure additional recommendation types allows you to provide a wider range of recommendations. Recommendation types are modeled as choice groups in Oracle Real-Time Decisions, and then associated to the choice groups within the Administration - Marketing > Response Management (RTD) view within the Siebel application. For more information about how to configure recommendation types, see [Chapter 3, "Setting Up Siebel In-Memory Next Best Action."](#)

About Siebel In-Memory Next Best Action Response Action Framework

With Siebel In-Memory Next Best Action, you can initiate specified actions when you receive a response from a customer about a recommendation. For example, if a customer shows interest in a marketing offer, then you can create a lead within the application. If a customer accepts an offer to enroll in a loyalty program, then you can trigger the enrollment process automatically. Also, if a customer rejects an offer, then you can update attributes within the database to flag the rejection so that future marketing initiatives can be adjusted accordingly.

The Siebel In-Memory Next Best Action Response Action Framework triggers the default workflows that initiate the multiple options that have been defined for a response. When a response is recorded, all of the actions that have been set up against a response will be triggered. For more information about response actions for Siebel In-Memory Next Best Action, see [Chapter 3, "Setting Up Siebel In-Memory Next Best Action."](#)

About the Recommendations History Feature

Siebel In-Memory Next Best Action provides a Recommendations History screen to provide a better view of the customer based on information about past interactions with that customer. The RTD Requests list contains information about requests to Oracle Real-Time Decisions and lists the date and time that each request was generated. The Recommendations History screen displays the Recommendation ID, the name of the recommendation, the recommendation type, the response, and the reject reason (if applicable). The RTD Request Attributes screen displays details about the request attributes, such as the attribute type, the attribute name, and the attribute value.

You can also view the responses that were selected against previous recommendations. For more information about how to configure response actions, see [Chapter 3, "Setting Up Siebel In-Memory Next Best Action."](#)

3

Setting Up Siebel In-Memory Next Best Action

This chapter covers how to set up Siebel In-Memory Next Best Action. It includes the following topics:

- [Process of Setting Up Siebel In-Memory Next Best Action](#)
- [Configuring the Oracle Real-Time Decisions Server for Siebel In-Memory Next Best Action](#)
- [Integrating the Oracle Real-Time Decisions Server with the Siebel Application](#)
- [Configuring Choice Groups in the Siebel Application](#)
- [Defining Choice Group Events, Response Actions, and Parameters](#)
- [Creating Customized Views for RTD Recommendations](#)
- [Enabling or Disabling Recommendation Renderer Functionality](#)
- [Configuring Recommendation Names to Display in the Recommendations History Screen](#)
- [Disabling Transaction Tracking](#)

Process of Setting Up Siebel In-Memory Next Best Action

To set up Siebel Business Applications to use Siebel In-Memory Next Best Action, perform the following tasks:

- 1 [Configuring the Oracle Real-Time Decisions Server for Siebel In-Memory Next Best Action](#)
- 2 [Integrating the Oracle Real-Time Decisions Server with the Siebel Application](#)
- 3 [Configuring Choice Groups in the Siebel Application](#)
- 4 [Defining Choice Group Events, Response Actions, and Parameters](#)
- 5 [Creating Customized Views for RTD Recommendations](#)
- 6 [Enabling or Disabling Recommendation Renderer Functionality](#)
- 7 [Configuring Recommendation Names to Display in the Recommendations History Screen](#)
- 8 [Disabling Transaction Tracking](#)

Configuring the Oracle Real-Time Decisions Server for Siebel In-Memory Next Best Action

This task is a step in [“Process of Setting Up Siebel In-Memory Next Best Action”](#) on page 13.

The first task in this process requires that you perform configurations within Oracle Real-Time Decision Center and that you have already set up Oracle Real-Time Decisions and the Decision Studio. For information about configuring Oracle Decision Center and Oracle Real-Time Decisions, see the *Oracle® Real-Time Decisions Installation and Administration Guide* and the *Oracle® Real-Time Decisions Decision Center User's Guide* on Oracle Technology Network (<http://www.oracle.com/technetwork/indexes/documentation/index.html>).

Integrating the Oracle Real-Time Decisions Server with the Siebel Application

This task is a step in “[Process of Setting Up Siebel In-Memory Next Best Action](#)” on page 13. Use the following procedure to integrate the Oracle Real-Time Decisions Server with the Siebel application.

To integrate the Oracle Real-Time Decisions Server with the Siebel application

- 1 Within the Siebel application, navigate to the Administration - Web Services screen, then the Outbound Web Services view.
- 2 Within the Outbound Web Services list applet, query for *sigma* in the Namespace field.
- 3 For the ExternalChoiceService, update the Address field in the Service Port applet (the middle applet) to point to the appropriate RTD server (for example, `http://<server name>:<port number>/soap/services/ExternalChoice`), and click the Clear Cache button.
- 4 Navigate to the Administration - Integration screen, WI Symbolic URL List, and then the Host Administration view.
- 5 Within the Host Administration list, query for RTD_SERVER in the Virtual Name field.
- 6 Specify the host name of the RTD Server in the Name field: `<server name>:<port number>`.
- 7 Navigate to the Administration - Integration screen, WI Symbolic URL List, and then the Symbolic URL Administration view.
- 8 Within the Symbolic URL Administration list applet, query for *RTD* in the URL field.
The query should return seven symbolic URL records.
- 9 For each of these symbolic URL records, update the app argument value with the Inline Service name that you plan to use, such as SiebelB2C or SiebelB2B.
- 10 Change the user name and password for all of the records.
- 11 Navigate to the Administration - Server Configuration screen, Servers, and then the Parameters view.
- 12 Within the Server Parameters list applet, query for RTD* in the Parameter field.
The query should return four RTD parameter records.
- 13 Specify the following values for the four parameters:
 - RTD Application Name: Enter the RTD Application Name, such as B2C.

- RTD SOAP URL: Enter the RTD Server URL and port, such as `http://<machine name>:<port number>/rtis/sdwp`
- RTD Session Cookie Name: JSESSIONID (the default value)
- RTD Web Service Timeout: 3000 (this is the default value, but it can be changed)

NOTE: Follow [Step 14](#) to [Step 17](#) only if you want to enable the default runtime events.

14 Navigate to the Administration - Runtime Events screen, then the Action Sets view.

15 Within the Action Sets view, query for RTD* in the Name field.

The query should return four RTD parameter records.

16 Set the Active field to TRUE to make the Action Set records active. Do this only for the Inline Services that you are using. For example, only set the B2C records as active when you are using the SiebelB2C Inline Service.

NOTE: Do not activate any of the RTD Informant: Offer Event Interested or RTD Informant: Offer Event Not Interested runtime events. These runtime events are no longer supported.

17 Select Reload Runtime Events from the menu to clear the cache.

Configuring Choice Groups in the Siebel Application

This task is a step in [“Process of Setting Up Siebel In-Memory Next Best Action”](#) on page 13.

This topic contains the following subtopic:

- [Adding the Custom Choice Group List of Values](#)

Adding the Custom Choice Group List of Values

The NBA_CHOICE_GROUP TYPE list of values is prepopulated in the Siebel application by default. However, if you have added custom choice groups on the Oracle Real-Time Decisions Server, you must add them to the Siebel application.

Use the following procedure to add a custom choice group list of values to the Siebel application.

To add a custom choice group list of values to the Siebel application

- 1** Within the Siebel application, navigate to the Administration - Data view, then List of Values screen.
- 2** Within the List of Values screen, add the Choice Group Type LOV with the following values:
 - a** Enter NBA_CHOICE_GROUP_TYPE in the Type field.
 - b** Enter the choice group name in the Display Value field.
 - c** Enter the choice group name defined in Oracle Real-Time Decisions Studio in the Language-Independent Code field.

Defining Choice Group Events, Response Actions, and Parameters

This task is a step in "Process of Setting Up Siebel In-Memory Next Best Action" on page 13.

This topic contains the following subtopics:

- [Adding Choice Groups](#)
- [Adding Choice Group Events](#)
- [Defining Response Actions for Choice Group Events and Response Action Workflow Parameters](#)

Adding Choice Groups

Use the following procedure to add choice groups.

To add choice groups

- 1 Within the Siebel application, navigate to the Administration - Marketing screen, and then the Response Management (RTD) view.
- 2 Add a new choice group as follows:
 - a Enter the name of the choice group in the Name field.
 - b Enter the application name in the RTD Application Name field. This value must match the application name that has been defined in Oracle Real-Time Decisions Studio.
 - c Enter the recommendation type that was defined on the Oracle Real-Time Decisions Server in the RTD Recommendation Type field, such as Marketing Offer.
 - d Repeat [Step a](#) through [Step c](#) for each choice group

Adding Choice Group Events

Use the following procedure to add choice group events.

To add choice group events

- 1 Within the Siebel application, navigate to the Administration - Marketing screen, Response Management (RTD), and then the RTD Response Choice Group Events screen.
- 2 For each choice group that you created, select the record.
- 3 Click New in the Choice Group Events applet, and do the following:
 - a Add the name of the action in the Name field.
 - b Add the choice event name in the RTD Choice Event Name field, such as Accept and Reject. This value must match the choice group event name that was set on the Oracle Real-Time Decisions Server.

NOTE: The values in the Sequence field are generated automatically.

Defining Response Actions for Choice Group Events and Response Action Workflow Parameters

Use the following procedures to define RTD response actions for choice group events and to define response action workflow parameters.

To define RTD response actions for choice group events

- 1 Within the Siebel application, navigate to the Administration - Marketing screen, Response Management (RTD), and then the Response Actions view.
- 2 Scroll down to the RTD Response Actions screen, and select each choice group event for which you want to define an action.
- 3 For each choice group event, click New, and do the following:
 - a Enter Run Process in the Action Type field.
 - b Enter Workflow in the Action Code field.
 - c Select the name of the workflow from the Workflow Name drop-down list, such as Marketing Create Lead.

Use the following procedure to define response action workflow parameters. Note that there are two types of workflow parameters: Named Parameters and Workflow Parameters.

To define response action workflow parameters

- 1 Within the Siebel application, navigate to the Administration - Marketing screen, then the Response Management (RTD) view, select each action that you want to define, and click New to add new records.
- 2 Enter the parameter type in the Parameter Type field:
 - a Specify the value of the Named Parameter type using the following formatting:

NOTE: When you define the Named Parameters type, the value defined in the corresponding business component field is retrieved and passed to the workflow as a parameter value.

where:

- *Name* is the name of the parameter as specified in the workflow
- *Value* is BO Name.First Level BC|Second Level BC|Field Name

For example:

Contact.Contact|Id

Contact.Contact|Campaign List Contact|Campaign Id

NOTE: Up to two business component levels are supported. The business object, business component, and field names must match the values in Siebel Tools.

- b Specify the value of the Workflow Parameter workflow parameter using the following formatting:

NOTE: When you define the Workflow Parameters workflow parameter, the value defined with this parameter type will be passed to the workflow as it is.

where:

- *Name* is the name of the parameter as specified in the workflow
- *Value* is the value of the parameter

Creating Customized Views for RTD Recommendations

This task is a step in [“Process of Setting Up Siebel In-Memory Next Best Action”](#) on page 13.

The RTD Recommendations views are populated in the Accounts and Contacts views by default. However, if you want to implement Siebel In-Memory Next Best Action within other Siebel Business Applications, you must create RTD Recommendations views. Use the following procedure to create views for RTD Recommendations.

To create views for RTD Recommendations

- 1 Within Siebel Tools, navigate to Business Component and query for the RTD Intelligent Offers (B2C) business component.
- 2 Copy the business component and rename it.

NOTE: You must set the business component class to `CSSBCVRTDOffers` in order to fetch the recommendations.

- 3 Enter the values for the business component user properties as listed in the following table.

User Property Name	Value
Application	RTD Application Name
Informant Integration Point	The default RTD Informant inline service name to be called during Informant calls
Integration Point	The default RTD Advisor inline service name to be called during Advisor calls
RTD Account Id Field	The field in the business component to be used for Account ID
RTD Contact Id Field	The field in the business component to be used for Contact ID
RTD Offer Id Field	The field in the business component to be used for Offer ID

User Property Name	Value
RespAction Integration Point	The default RTD Informant inline service name to be called when processing responses
Session Key	The field in the business component to be used as the default session key
Syspref Application	The corresponding RTD inline service name defined in the System Preferences view
TrackRecommendations	This user property must be set to Y or N to indicate whether or not recommendations should be tracked

- Using Object Explorer, navigate to Applets, copy the RTD Intelligent Offers List Applet (B2C) applet, and rename it.

NOTE: To display recommendations in high-interactivity or standard-interactivity applications, the applet class should be `CSSWWEFrameNBARA` so that the Response dialog box displays.

- Create a new view and add the applet that you just created to the new view.
- Add the view to the corresponding screen.
- Compile the changes to the SRF.

Enabling or Disabling Recommendation Renderer Functionality

In the Open UI application, the Recommendation Renderer files allow the interface to display images for the recommended items. It can be used for both accounts and for contacts, but it is only prepopulated for contacts. You must create a new record to be able to implement Recommendation Renderer functionality for accounts.

Use the following procedure to enable Recommendation Renderer functionality for accounts.

To enable Recommendation Renderer functionality for accounts

- Within the Siebel application, navigate to the Administration - Application screen, then the Manifest Administration view.
- Within the UI Objects applet, create a new record for the RTD Intelligent Offers List Applet (B2B) applet, and enter `recommendationrenderer.js` as the file name.

NOTE: Use the RTD Intelligent Offers List Applet (B2C) applet that was provided by default for contacts as a reference.

You can disable the Recommendation Renderer files if you do not want to use the Recommendation Renderer feature. Use the following procedure to disable the Recommendation Renderer functionality.

To disable the Recommendation Renderer functionality

- 1 Within the Siebel application, navigate to the Administration - Application screen, then the Manifest Administration view.
- 2 Perform the following actions:
 - a To disable the functionality for accounts, query for the RTD Intelligent Offers List Applet (B2B), and inactivate the manifest.
 - b To disable the functionality for contacts, query for the RTD Intelligent Offers List Applet (B2C), and inactivate the manifest.
- 3 Log out of the Siebel application and then log back in.

Configuring Recommendation Names to Display in the Recommendations History Screen

This task is a step in [“Process of Setting Up Siebel In-Memory Next Best Action” on page 13](#).

If you have created a new recommendation type other than the default recommendation types, you must populate the names of the recommendations in the Recommendation History screen. This allows users to drill down on the Name field for each recommendation to see further details about the recommendation.

Use the following procedure to configure the NBA Track Recommendation Response business component to display recommendations in the Recommendations History screen.

To configure the Recommendations History screen to display recommendations

- 1 Within Siebel Tools, using Object Explorer, navigate to the NBA Track Recommendation Response business component, and lock the project.
- 2 Create new joins to the table that contains the Name field. For example, to populate the Marketing Offer recommendation in the Recommendation History screen, you create new joins to the S_MKTG_OFFR table.
- 3 Add a join specification to join with the Recommendation Id field:
 - a Get the Name field from the join that you created in [Step 2 on page 20](#).
 - b Enter a value in the Name field that returns the Name value according to the recommendation type, as shown in the following example:

```
IIF([Recomm Type Code]=' Marketing Offers', [Offer Name], IIF([Recomm Type Code]=' Li fe Sci ences', [Li fe Sci ence Name], [Product Name]))
```
 - c Create a new user property with the following values:

where:

 - *Name* is the exact value of the RTD Recommendation Type

- *Value* is View Name|BO Name|BC Name|Field Name on which the Recommendation Id must be applied>

For example: Parent Offer Details View|Parent Offer|Parent Offer|Id

- d (Optional). If you have added a new applet, add the Name field created in [Step b on page 20](#) to the applet to show in the UI, and create a drilldown object in the applet for the Name field.

- 4 Compile all of the changes to the SRF.

Disabling Transaction Tracking

By default, all recommendations that were generated through transactions in the user interface (such as by a call center agent who receives a call from a customer) are stored in the Recommendation History view.

If you want to disable this functionality, then use the following procedure.

To disable the TrackRecommendations functionality

- 1 Within Siebel Tools, using Object Explorer, navigate to Business Component, and query for the RTD Intelligent Offers (B2C) and RTD Intelligent Offers (B2B) business components.
- 2 Within Business Component User Properties, change the value of the TrackRecommendations user property from Y to N.
- 3 Compile your changes to the SRF.

4

Using Siebel In-Memory Next Best Action

This chapter describes how to use Siebel In-Memory Next Best Action. It includes the following topics:

- [Scenario for Using Siebel In-Memory Next Best Action to Provide Cross-Channel Support on page 23](#)
- [Viewing Recommendation Data for Contacts on page 24](#)
- [Viewing Recommendation Data for Accounts on page 24](#)
- [Viewing Details About Interactions on page 24](#)

Scenario for Using Siebel In-Memory Next Best Action to Provide Cross-Channel Support

This topic gives one example of how Siebel In-Memory Next Best Action functionality might be used in a scenario that also involves a Web site, a mobile device, and Siebel Call Center working together. You might use Siebel In-Memory Next Best Action differently, depending on your business model.

An existing customer, who is a member of a luxury furniture store's Siebel Loyalty program, logs in to a company's Web site. Siebel In-Memory Next Best Action functionality presents the customer with an offer for kitchen refurbishment, and this offer is based on information about the sites that the customer has browsed to. The customer does not accept the initial offer for kitchen refurbishment, but she does navigate to the Beds page and does not purchase a bed, but she does add a bed to her Favorites. The customer then receives a message on her phone from the furniture store's mobile application that invites her to review special offers selected for her. The mobile application displays two offers: one for a bed and one for a bed cover. The customer enters her credit-card information and confirms her shipping address, and she purchases both the bed and the bed cover using the mobile application.

After three days, her order has not arrived during the expected period, so the customer calls the company to investigate. Within the Contact Summary (RTD) list, the agent clicks New to enter the inbound call as a new activity within the Activities screen, notes the customer's complaint, apologizes for the delay, and confirms the shipping status of the order. Within the call center agent's screen, the Retention Action screen displays a value in the Churn Indicator field that indicates an increased percentage of risk for customer churn. Based on the inbound call activity, the CallAdvisor call calculates this value and transfers it to Oracle Real-Time Decisions.

To decrease the risk of customer churn, Oracle Real-Time Decisions returns two recommendation offers for the agent to suggest to the customer. The customer declines the first offer, but she accepts the second offer for loyalty points in return for sharing a photo of her house. At the end of the interaction, the customer is automatically enrolled in the Loyalty promotion.

Viewing Recommendation Data for Contacts

For Business-to-Customer (B2C) applications, you can view data for real-time decisions in the Contact Summary (RTD) view.

To view data for real-time decisions for a contact

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 Drill down on the Last Name field for the contact record.
- 3 Click the Contact Summary (RTD) tab, and navigate to Recommendations.

The view displays the applicable activities, recommendations, and retention actions for the contact that you selected.

Viewing Recommendation Data for Accounts

For Business-to-Business (B2B) applications, you can view data for real-time decisions in the Account Summary (RTD) view.

To view data for real-time decisions for an account

- 1 Navigate to the Accounts screen, and then the Accounts List view.
- 2 Drill down on the Name field for the account record.
- 3 Click the Account Summary (RTD) tab.

The view displays the activities, recommendations, responses to recommendations, and retention actions for the account that you selected.

Viewing Details About Interactions

In the preconfigured application, the Contact Summary (RTD) and Account Summary (RTD) view tabs include an Interactions subtab. The Interactions subtab displays details about interactions that occur between Oracle's Siebel Business Applications and Oracle Real-Time Decisions for a particular contact or account. All of the transaction or session attributes for an RTD Advisor call and the recommendations returned by Oracle Real-Time Decisions are detailed in this subtab in a Request Attributes applet and a Recommendations History applet.

NOTE: Oracle Real-Time Decisions interaction details are recorded only when transaction tracking is enabled. This functionality is enabled by default, but it can be disabled. For more information about how to disable transaction tracking, see ["Disabling Transaction Tracking" on page 21](#).

Administrators can add the Request Attributes and Recommendation History applets to views for entities other than contacts and accounts. For more information about adding applets to views, see [“Creating Customized Views for RTD Recommendations” on page 18](#).

Viewing Details About Interactions for Contacts

Use the following procedure to view details about interactions for contacts.

To view details about interactions for contacts

- 1 From the Site Map, navigate to the Contacts screen, the Contacts List view, the Response Management (RTD) view, and then the Interactions subtab.
- 2 Query for the contact whose interactions you want to view.

A record is created for each request made to RTD. Each record contains details that include when the request was made, recommendations, and the request attributes. The following table lists the fields that are displayed.

Field	Description
RTD Name	Name of the Inline Service on the Oracle Real-Time Decisions Server
Request Date	When the recommendation was sent to the Oracle Real-Time Decisions Server

- 3 Scroll to the Recommendations History applet. The Recommendations History applet describes recommendations and details returned by RTD for a specific interaction. The following table lists the fields that are displayed.

Field	Description
Recommendation Id	Unique identifier of the recommendation
Recommendation Name	The name of the recommendation
Recommendation Type	The recommendation type, such as Marketing Offers, Loyalty Promotions, and Products
Response	Response chosen for the specific recommendation

- 4 Scroll to the Request Attributes applet. The RTD Request Attributes applet describes the attributes that are passed to RTD when an RTD Advisor call is made. The following table lists the fields that are displayed.

Field	Description
Attribute Type	Possible values include Session and Transaction.
Attribute Name	The name of the attribute. This parameter is passed to the Oracle Real-Time Decisions Server with the request.
Attribute Value	The value of the attribute. This attribute parameter value is passed to the Oracle Real-Time Decisions with the request.

Viewing Details About Interactions for Accounts

Use the following procedure to view details about interactions for accounts.

To view details about interactions for accounts

- 1 From the Site Map, navigate to the Accounts screen, the Account List view, the Response Management (RTD) view, and then the Interactions subtab.
- 2 Query for the account whose interactions you want to view.

A record is created for each request made to RTD. Each record contains details including when the request was made, recommendations, and the request attributes. The following table lists the fields that are displayed.

Field	Description
RTD Application	Name of the Inline Service on the Oracle Real-Time Decisions Server
Request Date	When the request was sent to the Oracle Real-Time Decisions Server

- 3 Scroll to the Recommendations History applet. The Recommendations History applet describes recommendations and details returned by RTD for a specific interaction. The following table lists the fields that are displayed.

Field	Description
Recommendation Id	Unique identifier of the recommendation
Recommendation Name	The name of the recommendation
Recommendation Type	The recommendation type, such as Marketing Offers, Loyalty Promotions, and Products
Response	Response chosen for the specific recommendation

- 4 Scroll to the Request Attributes applet. The Request Attributes applet describes the attributes that are passed to RTD when making an RTD Advisor call. The following table lists the fields that are displayed:.

Field	Description
Attribute Type	Possible values include Session and Transaction.
Attribute Name	Name of the attribute. This parameter is passed to the RTD server with the request.
Attribute Value	Value of the attribute. This attribute parameter value is passed to the RTD server with the request.

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No index available for this guide.

