### **Oracle® Revenue Management and Billing**

Version 5.0.0.0.0

### **Chatbot Configuration Guide**

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#### Oracle Revenue Management and Billing Chatbot Configuration Guide

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# Preface

### **About This Document**

This document provides an overview for the **Chatbot** feature. It helps you to understand how to configure Chatbot in the Oracle Revenue Management and Billing On-Premise Solution and Oracle Revenue Management and Billing Cloud Service.

### **Intended Audience**

This document is intended for the following audience:

- End-Users
- System Administrators
- Consulting Team
- Implementation Team

### **Organization of the Document**

The information in this document is organized into the following sections:

Section No.	Section Name	Description	
Section 1	Chatbot Overview	Provides an overview for the <b>Chatbot</b> feature.	
Section 2	Chatbot Configuration in ODA Lists and describes the steps that you r perform in Oracle Digital Assistant (O configure Chatbot for ORMB using ODA.		
Section 3	Chatbot Configuration in ORMB	Lists and describes the steps that you need to perform in Oracle Revenue Management and Billing (ORMB) to configure Chatbot for ORMB using ODA.	
Section 4	Using Chatbot in ORMB	Explains how to use the Chatbot feature in ORMB.	

### Acronyms

The following acronyms are used in this document:

Acronym	Meaning
ORMB	Oracle Revenue Management and Billing
ODA	Oracle Digital Assistant
IDCS	Oracle Identity Cloud Service
AMS	Application Management System

### **Related Documents**

You can refer to the following documents for more information:

Document Name	Description
Oracle Revenue Management and Billing Banking User Guide	Describes various features which are available for the financial services business. For example, customer registration, customer 360° view, invoicing group, pricing management, multi-currency accounts, currency conversion, construct based billing and settlement, trial billing, product lifecycle management, subscription billing, mass pricing update, accrual, foreign exchange gain loss, transaction feed management, upload validated payment and adjustment data, freeze payments on notification, payment request, offset request, funding request, hold request, refund/write off request, dispute request, upload request, earnings credit rate, payment agreement request, invoice request, deal management, etc. It describes all screens related to these features and explains how to perform various tasks related to the feature in the application.
Oracle Revenue Management and Billing Chatbot User Guide	Explains how to use the Menu Based Chatbot introduced in Oracle Revenue Management and Billing.

### Conventions

The following conventions are used across the document:

Convention	Meaning	
boldface	Boldface indicates graphical user interface elements associated with action, or terms defined in the text.	
italic	Italic indicates a document or book title.	
monospace	Monospace indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or information that an end-user needs to enter in the application.	

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# 1. Chatbot Overview

Oracle Revenue Management and Billing provides digital assistance to end-users using Oracle Digital Assistant (ODA). You can use the digital assistant, also known as detective Chatbot, to have conversational experiences with ORMB through text, chat, and voice interfaces.

We have introduced a **Menu Based Chatbot** in Oracle Revenue Management and Billing. The **Menu Based Chatbot** facilitates the user to choose from several options, presented in the form of menus and sub menus. For more information about the Chatbot feature, refer to *Oracle Revenue Management and Billing Banking User Guide* and *Oracle Revenue Management and Billing Chatbot User Guide*.

**Note:** At present, the **Chatbot** feature is tested and certified only for the financial services domain. As a result, the Chatbot feature is only available in the Oracle Financial Services Revenue Management and Billing Cloud Services.

To implement and use the **Chatbot** feature in the Oracle Financial Services Revenue Management and Billing On-Premise Solution, you need to do the following:

- 1. Procure the license for Oracle Digital Assistant (ODA) (in case you do not have the ODA license)
- 2. Integrate ODA with ORMB (by following the instructions given in this document)

However, if you want to use the **Chatbot** feature in the Oracle Financial Services Revenue Management and Billing Cloud Services, you can opt for either of the following approach:

- You can simply use Oracle Digital Assistant (ODA) which is embedded in the Oracle Financial Services Revenue Management and Billing Cloud Service. Here, the Chatbot configuration in Oracle Digital Assistant (ODA) and Oracle Financial Services Revenue Management and Billing Cloud Service will be managed by the respective Application Management System (AMS) team.
- Alternatively, if you already have Oracle Digital Assistant (ODA) license, then you need to configure Oracle Digital Assistant (ODA) as mentioned in the <u>Chatbot Configuration in ODA</u> section. The Chatbot configuration in the Oracle Financial Services Revenue Management and Billing Cloud Service will be managed by the respective Application Management System (AMS) team.

# 2. Chatbot Configuration in ODA

To configure Chatbot for Oracle Revenue Management and Billing using Oracle Digital Assistant (ODA), you need to perform the following steps in ODA:

- 1. Download the 34867347 Patch
- 2. Import the ORMB Chatbot Skill in ODA
- 3. Activate Insights for ORMB Chatbot Skill
- 4. Publish the ORMB Chatbot Skill
- 5. <u>Create a Channel for ORMB Chatbot</u>
- 6. <u>Set Custom Parameters for the ORMB Chatbot Skill</u>
- 7. Create an Authentication Service for ORMB Chatbot

### 2.1 Downloading the 34867347 Patch

Oracle Revenue Management and Billing provides an out-of-box product-specific skills for Oracle Digital Assistant (ODA) which facilitates a natural conversational user interface via chat or speech to text facility. The ORMB V50000 Chatbot skill for ODA is published by ORMB through the **34867347** patch on <u>My Oracle Support</u>.

You must download the **34867347** patch from <u>My Oracle Support</u>. When you unzip the downloaded file, the contents include the **34867347** folder. This folder contains a zip file named **ORMBChatBot(2.1)** and a **readme.txt** file. The **ORMBChatBot(2.1)** zip file has ORMB-specific skills for Oracle Digital Assistant (ODA).

### 2.2 Importing the ORMB Chatbot Skill in ODA

To import the ORMB Chatbot skill in ODA, you need to:

1. Login to Oracle Digital Assistant (ODA). The Oracle Digital Assistant screen appears.

Digital Assistant – V	lersion 22.10			<b>Д</b> 🕲 неір	• •
🗅 Home	Skills				Import Skill
Development Y	Type in filter or pick from recents	Sort By	Platform Versions	Show Latest	Updatéd
C Skills		Updated Descending	Show All Status		
요 Digital Assistants					
📢 Channels	Th				
Store					
Events					
ណ្ដី Analytics	+ New Skill				
Settings					
🛓 Downloads					
Documentation					

#### Figure 1: ODA Window

- 2. From the **Development** menu, select the **Skills** option. The **Skills Catalog** page appears in the right pane of the screen.
- 3. Click the **Import Skill** option in the upper-right corner of the **Skills Catalog** page. The **Open** dialog box appears.

4. Browse and select the **ORMBChatBot(2.1).zip** file and then click **Open**. The ORMB Chatbot skill is imported in ODA and its details appear in the **Skills Catalog** page.

🛆 Home	Skills	Import Skill
団 Development 口 Skills	Type In filter or pick from recents     Q     Sort By Display Name Ascending     Platform Versions. Show All Status     Show Latest Updated	
Digital Assistants  C Channels  Store  E Events  Analytics  Cutions	ORMBChatBot Version 2.1 This belongs to Oracle Financial Services Revenue Management and Billing Team Indit Vegetade Platform Version 2208 ▲ Upgrade Last Updated Last Updated	
<ul> <li>➡ Downloads</li> <li>➡ Documentation</li> </ul>	Page 1 of 1 (1 of 1 items) $ \zeta   \ll 1 > > $	

Figure 2: ORMB Chatbot Skill

### 2.3 Activating Insights for ORMB Chatbot Skill

By default, the Insights reporting is disabled for the imported skills. To activate the Insights reporting for the imported skill:

- 1. Click the ORMB Chatbot skill (which we have imported) in the **Skills Catalog** page. The ORMB Chatbot Skill details appear in the right pane.
- 2. Click the **Settings** (<sup>(2)</sup>) icon. The **Settings** page appears in the right pane of the screen.

Digital Assistant – V	rsion 22.10	Ģ ⑦ Help ▼ sendma	ul-test-discard@oracle.com 🔻
🗅 Home	Skills • ORMBChatBot Rent-21-22#	✓ Validate 🛱 Findings	🛛 Train 🖒 Preview
Image: Section of the section of t	Settings       General Configuration Digital Assistant Events Q&A Routing Config       Diplay Name       ORMBChatBot       Name       ORMBChatBot       Version       2.1       Platform Version       22.08 (Active)       Created       Fit 10/21/2022 18:09       Category your skill fails under       One-Sentence Description       This belongs to Oracle Financial Services Revenue Management and Billing Team		

#### Figure 3: Settings Page

3. Turn on the **Enable Insights** toggle button in the **Settings** page.

### 2.4 Publishing the ORMB Chatbot Skill

To publish the ORMB Chatbot skill:

- 1. Click the **Options** (i) icon corresponding to the ORMB Chatbot skill in the **Skills Catalog** page. A menu appears.
- 2. Click Publish. The ORMB Chatbot skill now has a lock icon which indicates that it is published.

### 2.5 Creating a Channel for ORMB Chatbot

To expose your digital assistants and standalone skills to users, you need to create a channel in Digital Assistant. Channels carry the chat back and forth from users on various messaging platforms to the digital assistant and its various skills.

To create a channel for ORMB Chatbot:

- 1. From the **Development** menu, select the **Channels** option. The **Channels** page appears in the right pane of the screen.
- 2. Click Add Channel. The Create Channel window appears.

Name	Create Channel	×
Channel name   Description   Optional short description for this channel   Channel Type ⑦   Facebook Messenger   Page Access Token   Copy from the Facebook app and paste it here   Copy from the Facebook app and paste it here   Require   Copy from the Facebook app to here   Session Expiration (minutes)   1,440   You're using the standard default value	Name	
Description   Optional short description for this channel   Channel Type ⑦   Facebook Messenger   Page Access Token   Copy from the Facebook app and paste it here   Require   App Secret   Copy from the Facebook app to here   Session Expiration (minutes)   1,440   You're using the standard default value	Channel name	
Optional short description for this channel   Channel Type ⑦   Facebook Messenger   Page Access Token   Copy from the Facebook app and paste it here   Require   App Secret   Copy from the Facebook app to here   Session Expiration (minutes)   1,440   Vou're using the standard default value	Description	Require
Channel Type ⑦   Facebook Messenger   Page Access Token   Copy from the Facebook app and paste it here   App Secret   Copy from the Facebook app to here   Session Expiration (minutes)   1,440   You're using the standard default value	Optional short description for this channel	
Facebook Messenger <ul> <li>Page Access Token</li> <li>Copy from the Facebook app and paste it here</li> <li>Require</li> <li>App Secret</li> <li>Copy from the Facebook app to here</li> <li>Session Expiration (minutes)</li> <li>1,440</li> <li>Vou're using the standard default value</li> <li>Vou're using the standard default value</li> <li>Interval of the standard default value</li> <li>Interval of the standard default value</li> <li>Interval</li> <li>Inte</li></ul>	Channel Type ®	
Page Access Token         Copy from the Facebook app and paste it here       Require         App Secret       Copy from the Facebook app to here         Session Expiration (minutes)       Require         1,440       Vou're using the standard default value	Facebook Messenger	•
Copy from the Facebook app and paste it here  Require  App Secret  Copy from the Facebook app to here  Require  Session Expiration (minutes)  1,440 Vou're using the standard default value	Page Access Token	
Require App Secret Copy from the Facebook app to here Require 1,440 Vou're using the standard default value	Copy from the Facebook app and paste it here	
App Secret Copy from the Facebook app to here Require Session Expiration (minutes) 1,440 Vou're using the standard default value		
Copy from the Facebook app to here  Require  Session Expiration (minutes)  1,440  Vou're using the standard default value	Ann Forrat	Require
Require Session Expiration (minutes)  1,440  Vou're using the standard default value	Copy from the Facebook app to here	
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1,440 × ^	Session Expiration (minutes)	
Vou're using the standard default value	1,440	<b>v</b> ^
	Vou're using the standard default value	

#### **Figure 4: Create Channel Window**

- 3. Enter ORMBWebChannel in the Name field.
- 4. Enter Channel for Oracle Revenue Management and Billing Chatbot in the Description field.
- 5. Select the **Oracle Web** option from the **Channel Type** list.
- 6. If you want to enable the client-side authentication, turn on the **Client Authentication Enabled** toggle button.
- 7. Specify the Oracle domain name in the Allowed Domains field.
- 8. Click Create. The ORMBWebChannel page appears in the right pane of the screen.

ORMBWebChannel	
Channel Enabled <sup>®</sup>	
	Reset Sessions
Route To	
Select skill or digital assistant to route messages to 💽	
Name	
ORMBWebChannel	
Description	
Channel for Oracle Revenue Management and Billing Chatbot	
Channel Type	
Oracle Web	
Allowed Domains <sup>®</sup>	
**	

#### Figure 5: ORMBWebChannel Page

- 9. Ensure that you note down the Channel ID and Secret Key of the ORMB Chatbot channel for future reference.
- 10. Select the **ORMBChatBot(2.1)** skill from the **Route To** list.
- 11. Turn on the **Channel Enabled** toggle button. The **ORMBWebChannel** page appears as shown below:

C Home	Channels		
Development Y	Users Agent Integrations DA as Agent	Applications Events System	
C) Skills			
Digital Assistants	Channels (1)	ORMBWebChannel	
(+) Charmels	+ Add channel		Reset Sessions
Store	Filter	Nove To	
G Events	Sot By	ORMBCharBet ber set 131138 🛦 🔹	
Analytics	Unspley neme Ascending	Name Protection Process	
	ORMBWebChennel	UniversiteChange	
da Downloads		Description	
Documentation		Channel for Oracle Revenue Management and stilling Chatbot	
		Channel Type	
		Oracle Web	
		Allowed Domains Ø	
		* oracleindustry.com	
		Secret Key	
			Reset
		Chansel st	
		Clear Authentication Enabled	
		Secial Diplotion (minutes)	
		1440 Provincente a consist estudio volue	× ^

**Figure 6: ORMB Chatbot Channel** 

# 2.6 Setting Custom Parameters for the ORMB Chatbot Skill

To set the custom parameters for the ORMB Chatbot skill:

- 1. From the **Development** menu, select the **Skills** option. The **Skills Catalog** page appears in the right pane of the screen.
- 2. Click the ORMB Chatbot skill (which we have imported) in the **Skills Catalog** page. The ORMB Chatbot Skill details appear in the right pane.
- 3. Click the **Settings** (<sup>(a)</sup>) icon. The **Settings** page appears in the right pane of the screen.

Ξ O Digital Assistant - Version 22.10			imail-test-discard@oracle.com 🔻
🗅 Home <	Skills • ORMBChatBot Dett=21-22#	🗸 Validate 🛱 Finding	🗑 Train 🕨 Preview
Development     Image: Constraint of the	Settings         General       Configuration       Digital Assistant       Events       Q&A Routing Config         Display Name       ORMBChatBot       Interface       Interfa		

#### Figure 7: Settings Page

4. Click the **Configuration** tab in the **Settings** page. The **Configuration** tab appears.

<	Skills • ORMBChatBot Both • 23-2288	🗸 Validate	🛱 Findings	🗑 Train	Preview					
0 13	Settings General Configuration Digital Assistant Events Q&A Routing Config									
	System Parameters Confidence Threshold									
E	0.7		~ ^							
	Confidence Win Margin									
9	0.1		~ ^							
臨	Unexpected Error Prompt									
3	<pre>\$(rb('systemConfiguration_errorUnexpectedErrorPrompt'))</pre>									
E.	Max States Exceeded Error Prompt									
0	\$(rb('systemConfiguration_errorMaxStatesExceededPrompt'))									
	Expired Session Error Prompt									
	\${rb('systemConfiguration_errorExpiredSessionPrompt')}									
	OAuth Cancel Prompt									
	<pre>\$(rb('systemConfiguration_oauthCancelPrompt')}</pre>									
	OAuth Success Prompt									
	\${(b['systemConfiguration_oauthSuccessPrompt')}									

#### **Figure 8: Configuration Tab**

5. Specify the ORMB application host name and port number as the **businessServiceUrl** parameter value.

### 2.7 Creating an Authentication Service for ORMB Chatbot

Once you define the custom parameters for the ORMB Chatbot Skill, you need to create an authentication service named **IDCS\_ORMBChatbot** for ORMB Chatbot. Before creating an authentication service for ORMB Chatbot, you need to get the Client ID, secret, and scope of the ORMB application from Oracle Identity Cloud Service (IDCS) directly or with the help of the respective Application Management System (AMS) team.

To create an authentication service for ORMB Chatbot, refer to the instructions given in the following URL:

https://docs.oracle.com/en/cloud/paas/digital-assistant/use-chatbot/backendauthentication.html#GUID-3337DC59-0C03-4A0A-8B84-153D4F892839

# 3. Chatbot Configuration in ORMB

To configure Chatbot for Oracle Revenue Management and Billing using Oracle Digital Assistant (ODA), you need to perform the following steps in ORMB:

- 1. <u>Configure Chatbot in ORMB</u>
- 2. Verify the ODA Chatbot Installation in ORMB
- 3. <u>Refresh the ORMB Environment</u>
- 4. Invoke the ChatbotCredService Service

### Note:

This section is applicable when you want to use the **Chatbot** feature in the Oracle Financial Services Revenue Management and Billing On-Premise Solution. However, if you want to use the Chatbot feature in the Oracle Financial Services Revenue Management and Billing Cloud Service, the Chatbot configuration in the Oracle Financial Services Revenue Management and Billing Cloud Service will be managed by the respective Application Management System (AMS) team.

### 3.1 Configuring Chatbot in ORMB

To enable Chatbot for ORMB, you need to set the **com.oracle.oda.chatbot.intg.reqd** parameter in the CCB\_spl.properties.exit.include file to **Y**. Note that the CCB\_spl.properties.exit.include file is available in the \$SPLEBASE/templates directory.

Also, if you have enabled the client-side authentication in the ORMB Chatbot channel, you need to set the **com.oracle.oda.channel.auth.enabled** parameter in the CCB\_spl.properties.exit.include file to **Y**.

### 3.2 Verifying the ODA Chatbot Installation in ORMB

To verify the ODA Chatbot installation in ORMB, you need to:

- 1. Ensure that the ChatbotConfig.jsp file is placed at the \$SPLEBASE/splapp/applications/root/c1/extensions location.
- 2. Ensure that the chatbot folder is available at the \$SPLEBASE/splapp/applications/root/c1 location.

### 3.3 Refreshing the ORMB Environment

To reflect the changes made in the template configuration files on the ORMB environment:

1. Initialize the application environment where you want to reflect the changes using the following command:

### AIX, Linux:

\$SPLEBASE/bin/splenviron.sh -e \$SPLENVIRON

### Windows:

\$SPLEBASE\bin\splenviron.cmd -e %SPLENVIRON%

2. Update the application war file with the latest changes by executing the following command:

### AIX, Linux:

\$SPLEBASE/bin/initialSetup.sh

### Windows:

%SPLEBASE%\bin\initialSetup.cmd

### 3.4 Invoking the ChatbotCredService Service

To establish the connection between Oracle Digital Assistant and Oracle Revenue Management and Billing, you need to provide the ODA channel details in ORMB through a REST based inbound web service named **ChatbotCredService**. You can invoke the **ChatbotCredService** service using the <u>https://hostname:port/ouaf/rest/ouaf/api/iws/ChatbotCredService/chatbot</u> URL through an API client.

Before invoking the **ChatbotCredService** service, you need to ensure that the ODA channel connection request contains the following tags:

Tag Name	Tag Description	Mandatory (Yes or No)
odaChannelld	Used to specify the ORMB Chatbot channel ID.	Yes
	<b>Note:</b> Here, you need to specify the channel ID which was generated while creating a channel for ORMB Chatbot.	
odaURI	Used to specify the URI of Oracle Digital Assistant (ODA) (in which you have created the ORMB Chatbot channel).	Yes
odaChannelSecret	Used to specify the secret key of the ORMB Chatbot channel.	Yes

#### Sample ODA Channel Connection Request in JSON Format

```
{
```

1

```
"C1-CBLOGIN_SERVICE": {
```

"odaChannelSecret": "XXXXXXX",

```
"odaURI": "https://idcs-oda-
ad1a4136a4a748cda8bb72619d893dedt0.data.digitalassistant.oci.oc-test.com/",
```

```
"odaChannelId": "2819b228-8122-4835-a6a0-725343f27343"
```

# 4. Using Chatbot in ORMB

Once you connect ODA channel with the ORMB application, you need to login to Oracle Revenue Management and Billing. Note that the **Chatbot** icon appears (as highlighted in the below image) in the lower-right corner of the ORMB screen.

ORACLE Oracl	h System 🔻 About 🕜 Help				
Home Menu <del>-</del>	Admin 🗸 🔍 Search Menu	History <del>-</del>			
User				Bookmark Clear Save Refresh	Switch Language V
Main To Do Roles	Access Security Portal Preferences	Bookmarks Eavorite Links	Eavorite Scripts Characteristics	Miscellaneous	Alerts 🗸
					Bookmarks 🛛 🗸
USER	[] Q			OWNER	Current Context
LOGINID					Current To Do 🗸 🗸
LAST NAME		USER ENABLE	-		Customer Contact 🗸 🗸
FIRST NAME		USER TYPE	•		Eligible Scripts 🗸
LANGUAGE	•	PORTALS PROFILE USER	Q		Favorite Links
DISPLAY PROFILE	Q	FAVORITES PROFILE USER	Q		Approve Invoice Group [1]
TIME ZONE	Q				Invoice Group [2] Trial Bill [3]
EMAIL ADDRESS					
DASHBOARD WIDTH					Favorite Search
DASHBOARD LOCATION	-			+	ML Billing usecase scrip

#### Figure 9: Chatbot Icon

On clicking the **Chatbot** icon, the **Chatbot** window appears with a list of ORMB-specific menu options.

ORACLE <sup>®</sup> Oracle Revenue Management and Billing for Financial Services							English System 👻	About	(?) Help			
Home	Menu 🕶	Admin 🔫	Q Search Menu	н	istory 🔫					Billy CONNECTED	司义	۳
User	User Bookmark					NOVEMBER 24, 2022 AT 7:30 PM						
Main	To Do Roles	Access Security	Portal Preferences	Bookmarks Fa	vorite Links	Favorite Scripts	Characteristics	Miscellaneous	_	Pick an option to begin.		
USER			Q						OWNE	Customer Info		
LOGIN	D									Account Info		
LAST NA	ME			USER ENABLE		-				Bill Info		
FIRST N	АМЕ			USER TYPE		•				Pricing Info		
LANGUA	IGE		Ψ.	PORTALS PROFILE US	ER	Q						
DISPLAY	PROFILE		Q	FAVORITES PROFILE U	JSER	Q				Others		
TIME ZO	INE		Q							Exit		
EMAIL A	DDRESS											
DASHBO	ARD WIDTH									NOW		
DASHBO	DARD LOCATION	-								Type a message	1	) ହ

#### Figure 10: Chatbot Window

For more information about the Chatbot feature, refer to *Oracle Revenue Management and Billing Banking User Guide* and *Oracle Revenue Management and Billing Chatbot User Guide*.