

Chatbot Configuration Guide  
Oracle Banking Digital Experience  
Patchset Release 22.2.4.0.0

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## Chatbot Configuration Guide

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## Table of Contents

<b>1. Preface</b> .....	<b>1-1</b>
1.1 Intended Audience .....	1-1
1.2 Documentation Accessibility .....	1-1
1.3 Access to Oracle Support .....	1-1
1.4 Structure .....	1-1
1.5 Related Information Sources .....	1-1
<b>2. Purpose</b> .....	<b>2-1</b>
<b>3. Topology</b> .....	<b>3-1</b>
<b>4. Common Configurations</b> .....	<b>4-2</b>
4.1 ODA Configurations .....	4-2
<b>5. Configuring Channels in ODA</b> .....	<b>5-5</b>
5.1 Web Channel .....	5-5
5.2 Android Channel .....	5-6
5.3 iOS Channel .....	5-6
5.4 Facebook Channel .....	5-7
5.5 Alexa Channel .....	5-1
5.6 WhatsApp Channel .....	5-7

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# 1. Preface

## 1.1 Intended Audience

This document is intended for the following audience:

- Customers
- Partners

## 1.2 Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

## 1.3 Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

## 1.4 Structure

This manual is organized into the following categories:

Preface gives information on the intended audience. It also describes the overall structure of the User Manual.

The subsequent chapters describes following details:

- Introduction
- Preferences & Database
- Configuration / Installation.

## 1.5 Related Information Sources

For more information on Oracle Banking Digital Experience Patchset Release 22.2.4.0.0, refer to the following documents:

- Oracle Banking Digital Experience Installation Manuals
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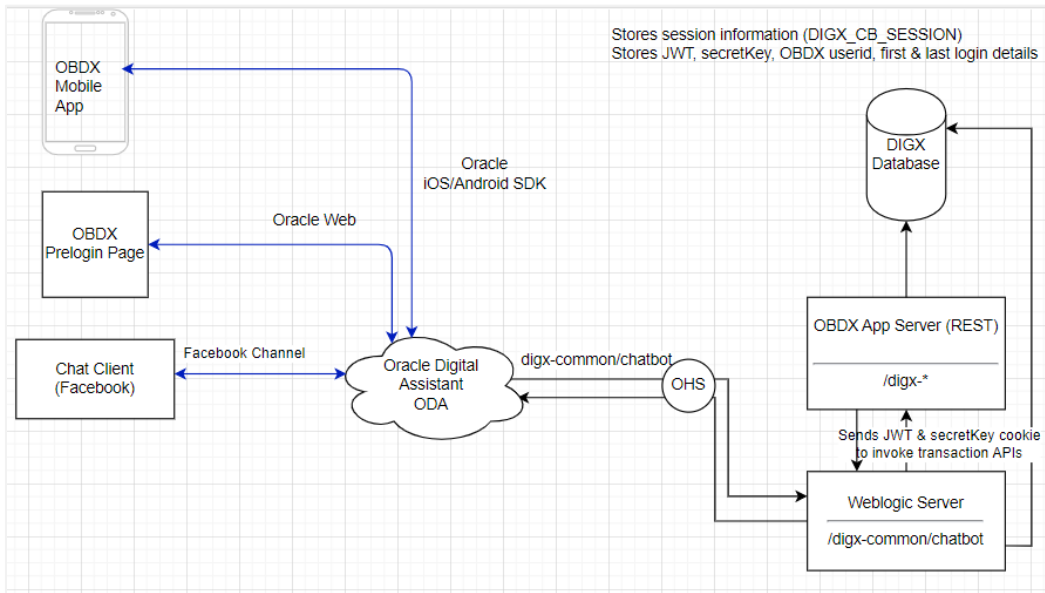
## 2. Purpose

OBDX provides interface for Chatbot module, integrated with Oracle Digital Assistant (ODA) out of the box. It provides end users a chat interface to interact with the bank. Transactions like balance enquiry, fund transfers to payees, enquiring about banking products and details of ATM/Branches can be achieved through chat. This document provides steps to setup OBDX chatbot module with ODA. The prerequisites include:

- ODA setup

[Home](#)

### 3. Topology

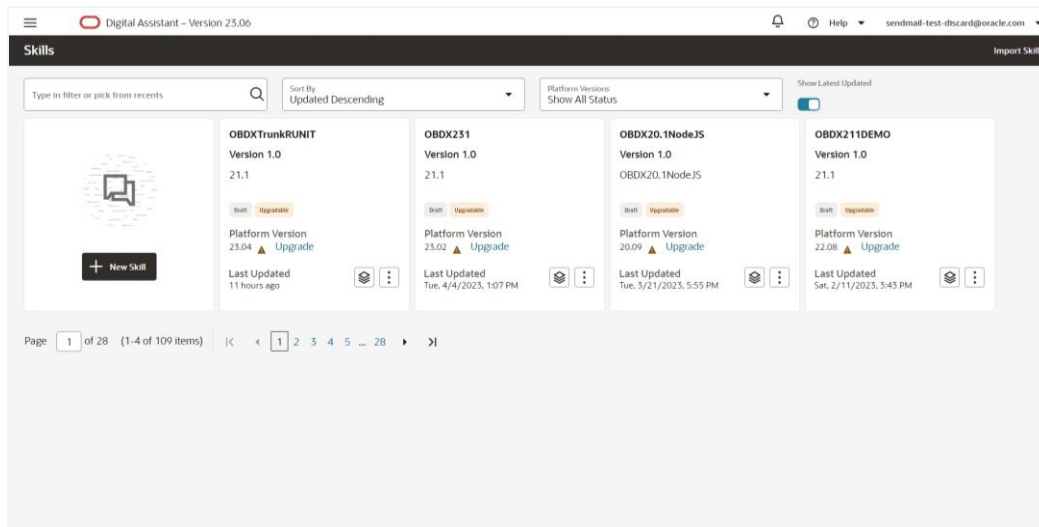


[Home](#)

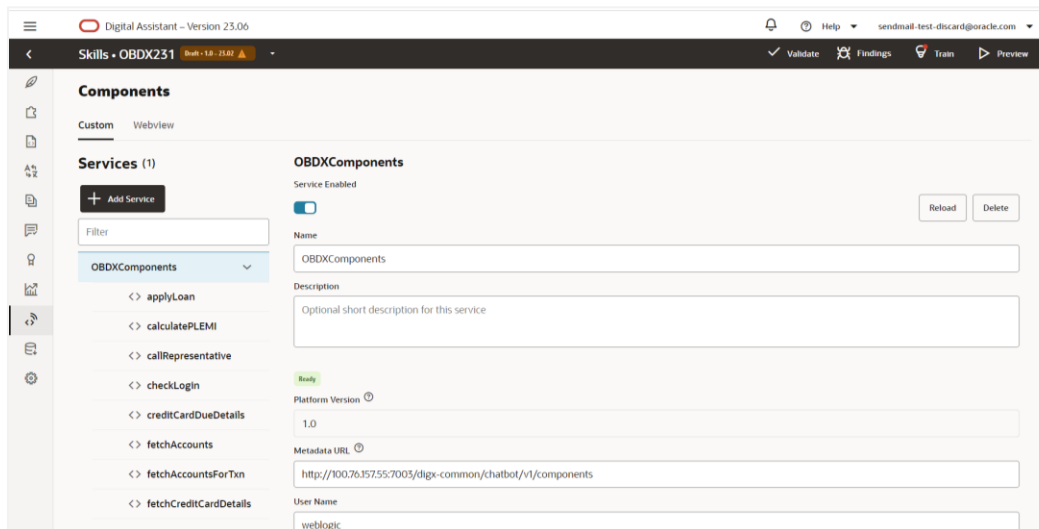
## 4. Common Configurations

### 4.1 ODA Configurations

1. Login to ODA and import the OBDX bot shipped with OBDX installer. This is a zip (OBDX.zip) file obtained in the installer in OBDX\_Installer/installables/chatbot/config directory. Import this by clicking the “Import Bot” on ODA dashboard.

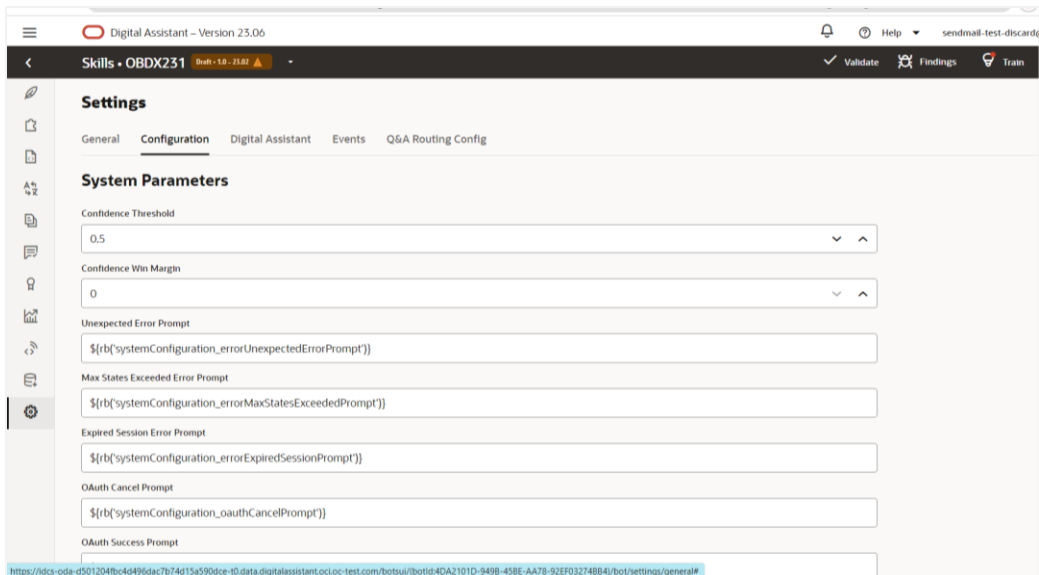


2. Click on the OBDX Bot and click on the components to add the custom components.

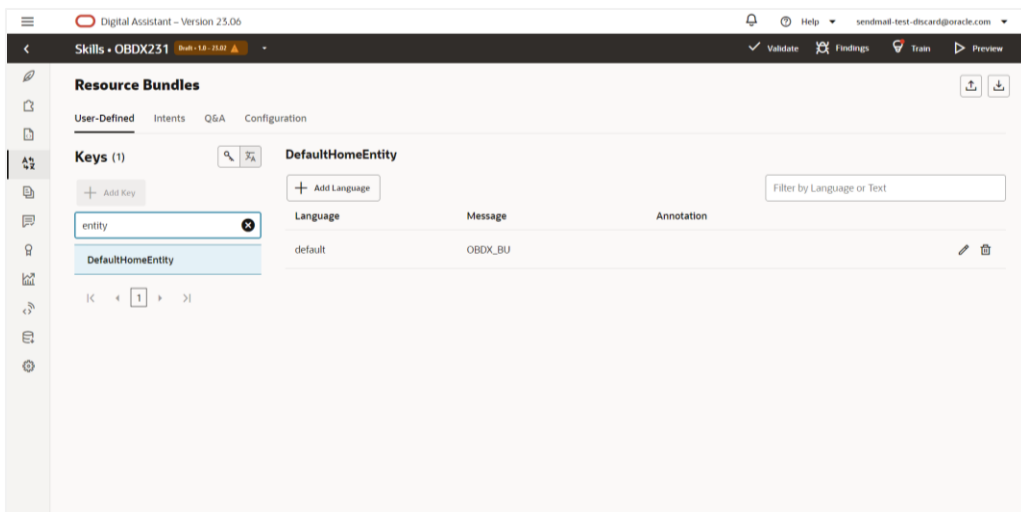


3. Put the OBDX URL here. The OBDX setup and the ODA setup must be accessible over Internet.
4. Add username/password (in HTTP Basic authorization) of any user with Administrators role which can be used to login in OBDX Weblogic server.

- In order to configure intent threshold for the skill go to settings tab in a bot and click configurations to configure threshold frequency (default 0.5) as shown below-

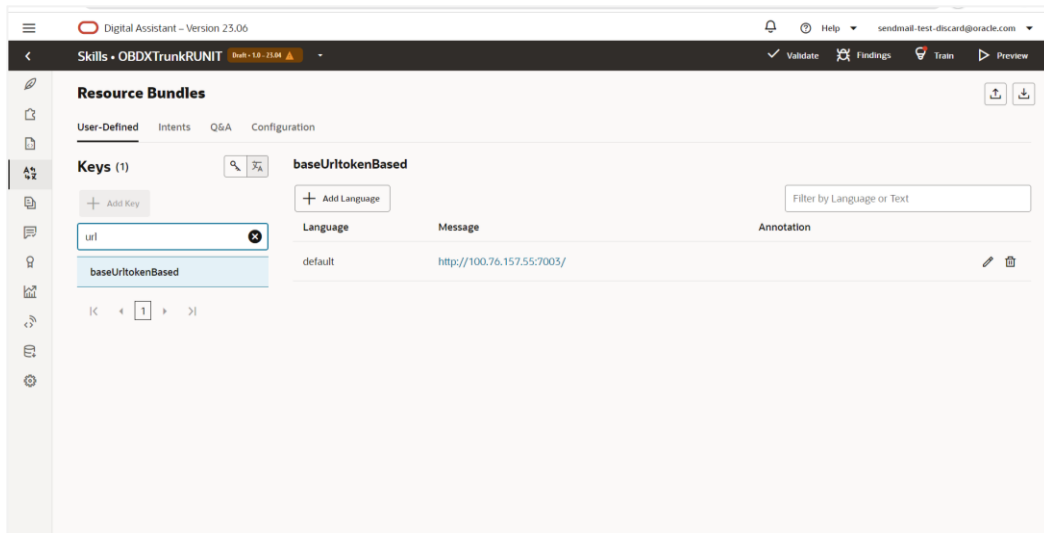


- Configure required entity in a resource bundles (one created/configured in OBDX). At a time chatbot works with single entity. Go to Resource Bundles as shown below-

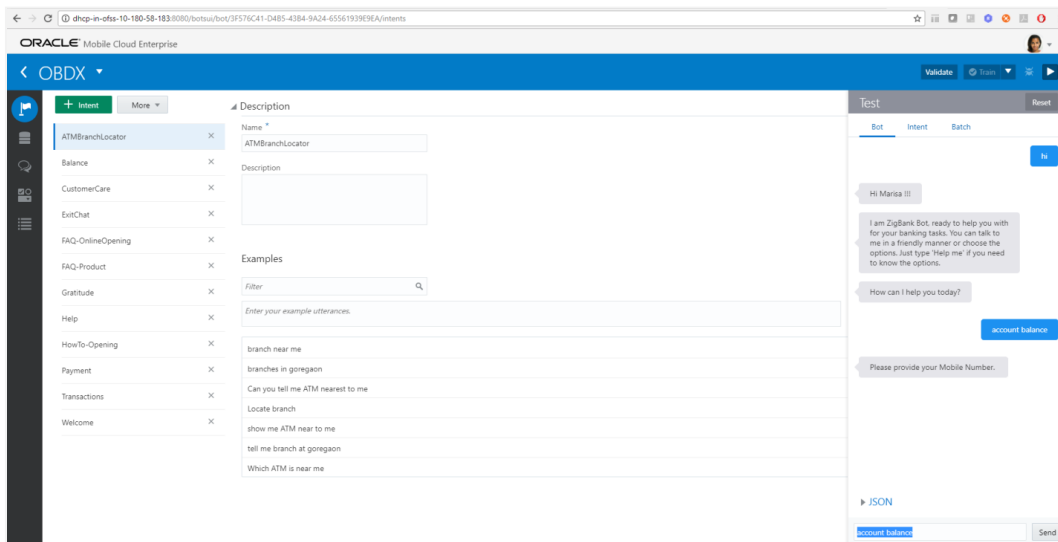




7. Configure OBDX managed server url where OBDX rest apis are hosted –



8. Login to ODA and click OBDXBot > Test



[Home](#)

## 5. Configuring Channels in ODA

In addition to Facebook Messenger Channel, OBDX bot can be configured with Oracle Web, Oracle Android and Oracle iOS channels.

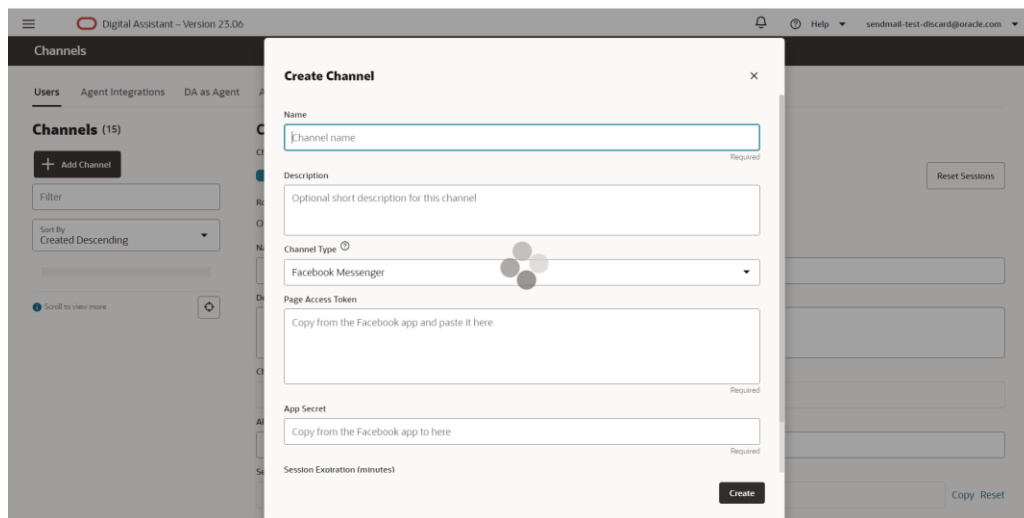
Chatbot widget appears on prelogin page in OBDX UI where the login is with mobile number/(OTP or PIN or Soft Token)

For post login, the browser session is automatically used

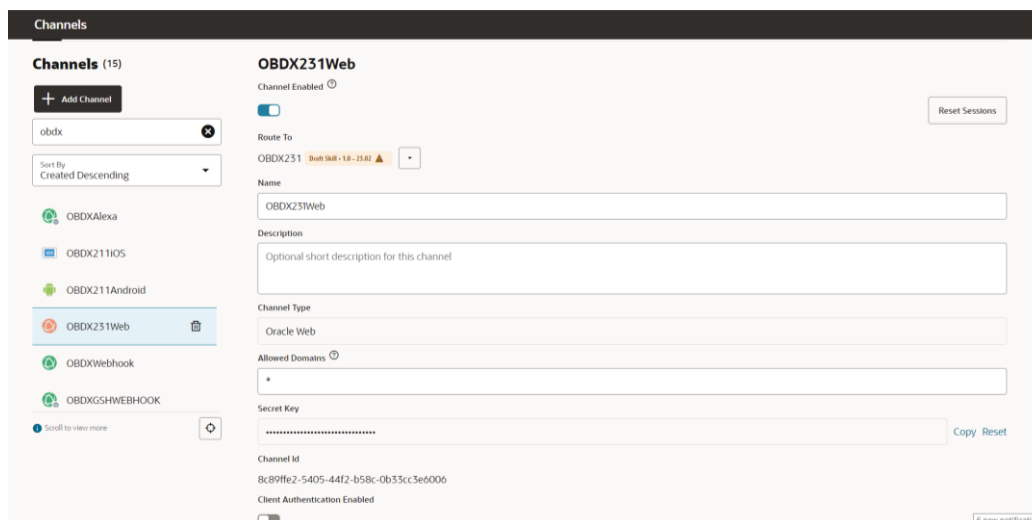
### 5.1 Web Channel

In order to configure this channel:

1. Choose Development ->Channels-> Users from the menu. Click **Add Channel**.



2. Create Oracle Web as the channel type.



3. Route the channel to your skill or digital assistant.

4. Switch Channel Enabled to On.
5. Add above Chatbot URL and channelId in /ui/framework/js/configurations/config.js in oda tag

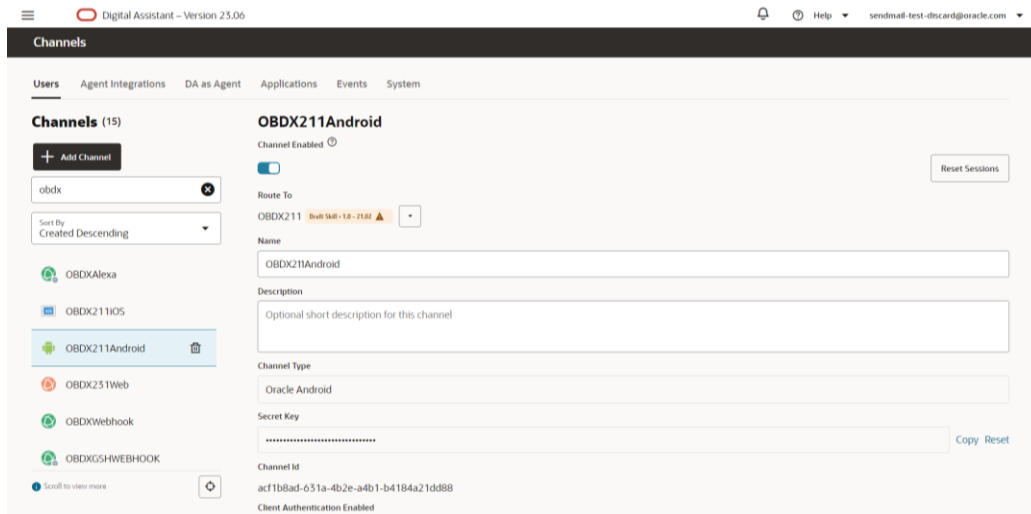
#### To remove this chatbot widget

- Remove URL & channelId in above file
- Remove the “chat-bot” tag in prelogin dashboard → DIGX\_DB\_DASHBOARD → DASHBOARDDESIGN blob for anonymous dashboard

## 5.2 Android Channel

#### In order to configure this channel:

1. Choose Development->Channels->Users from the menu. Click **Add Channel**.
2. Then add Oracle Android as the channel type.

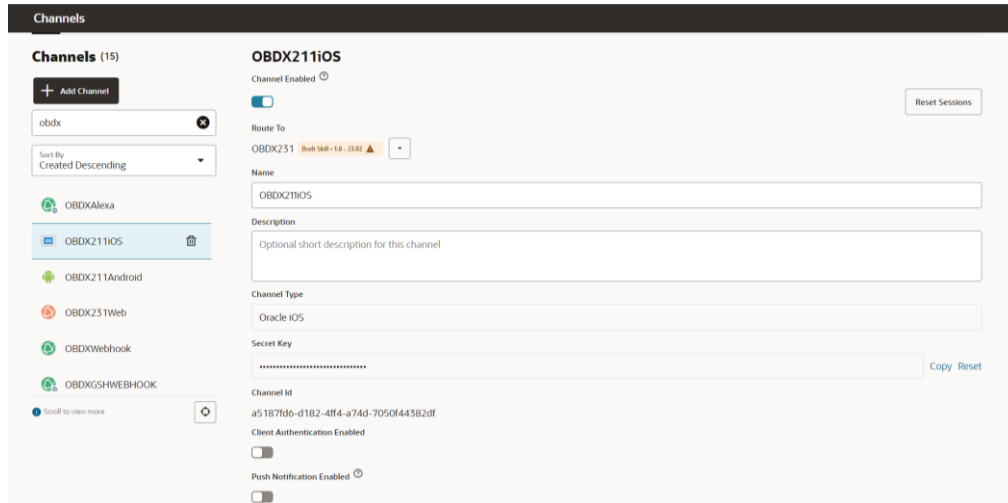


3. Route the channel to your skill or digital assistant.
4. Switch Channel Enabled to On.
5. Note the channel Id. This is required in app configuration

## 5.3 iOS Channel

#### In order to configure this channel:

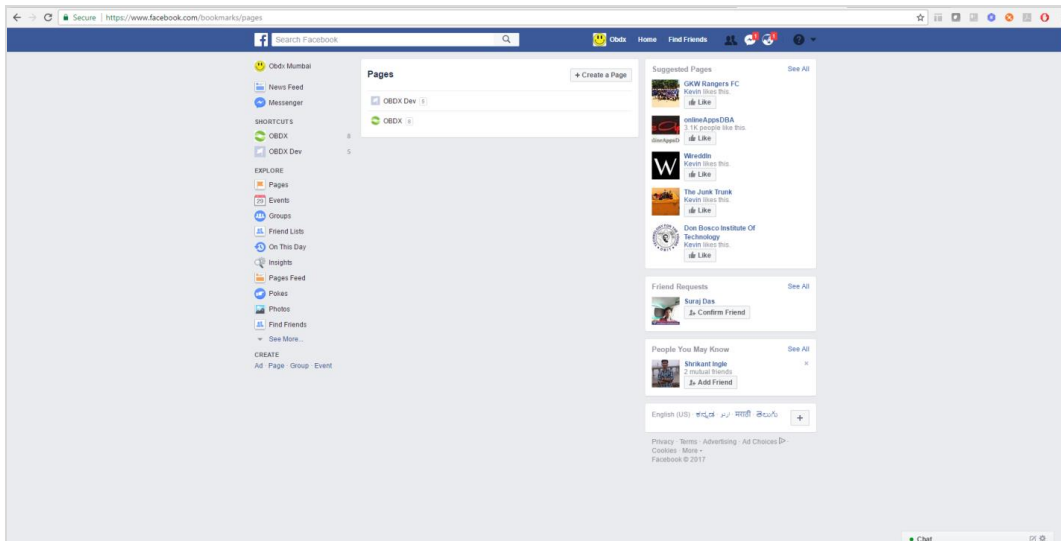
1. Choose Development->Channels->Users from the menu. Click Add Channel.
2. Add Oracle iOS as the channel type.



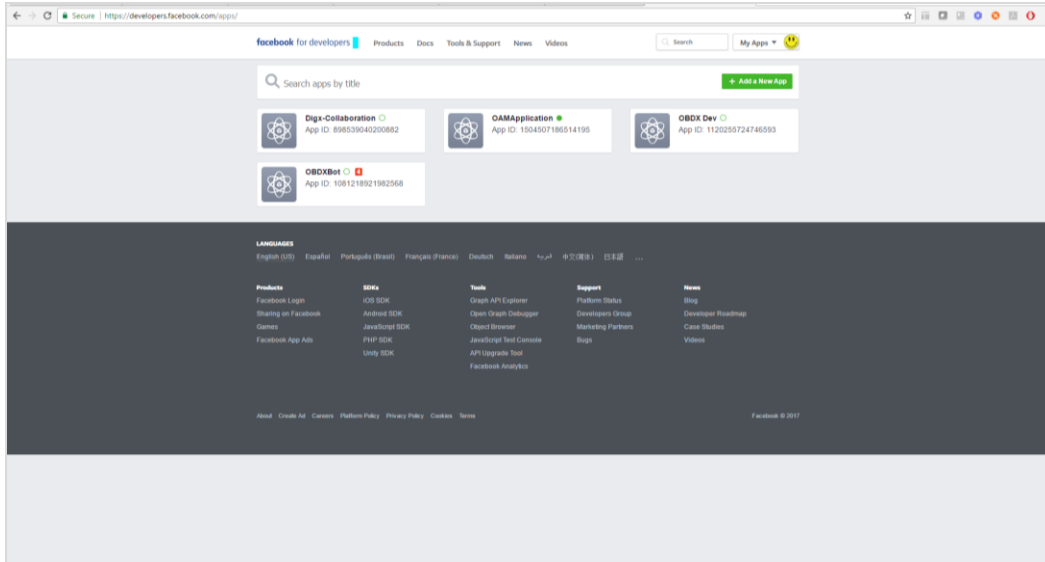
3. Route the channel to your skill or digital assistant.
4. Switch Channel Enabled to On.
5. Note the channel Id. This is required in app configuration

## 5.4 Facebook Channel

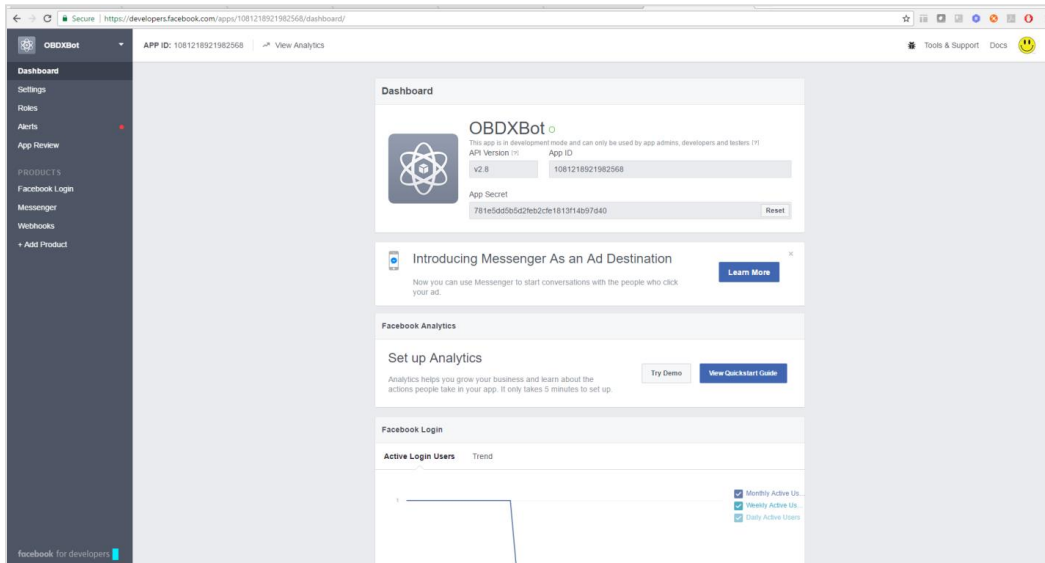
1. Create a Facebook account for the Bank. Login to Facebook with credentials.
2. Create a new page



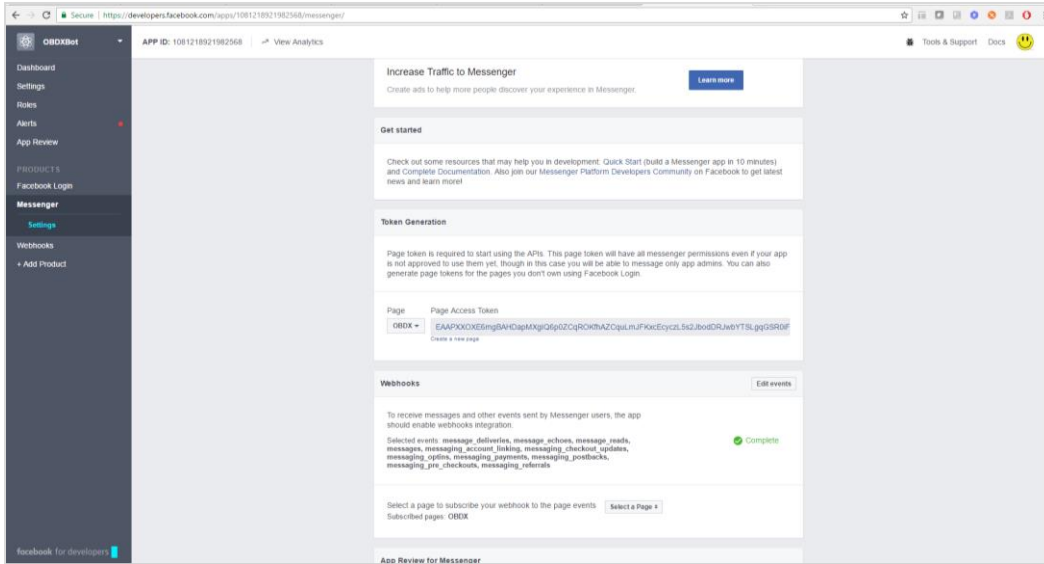
3. Navigate to developer link and create an application as shown below



4. Navigate to dashboard page and note the app secret as it will require in future steps.

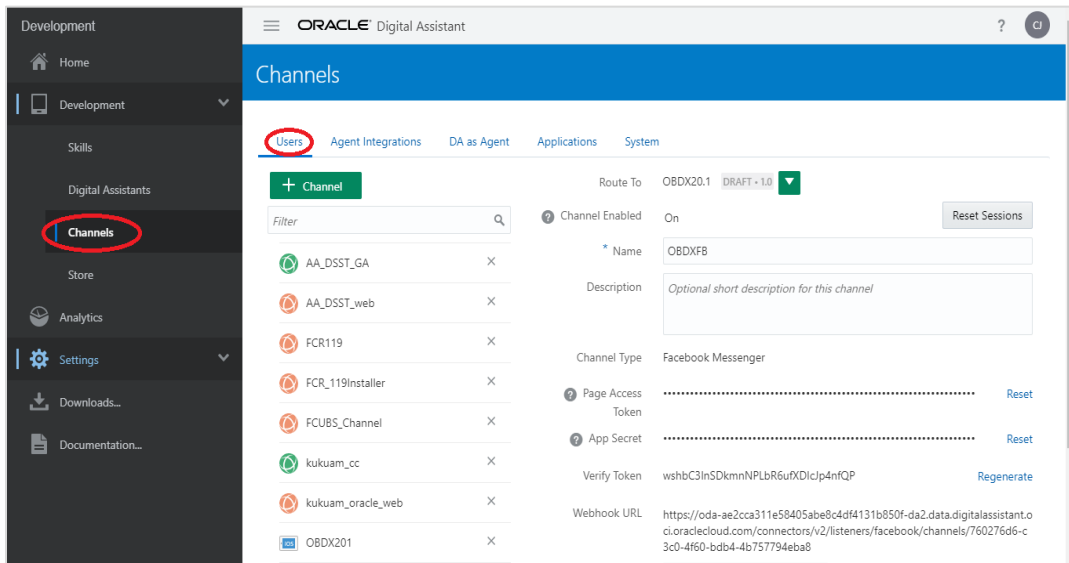


5. Navigate to Messenger > Settings page from left panel and in token generation section select the page created previously. Note the page access token.

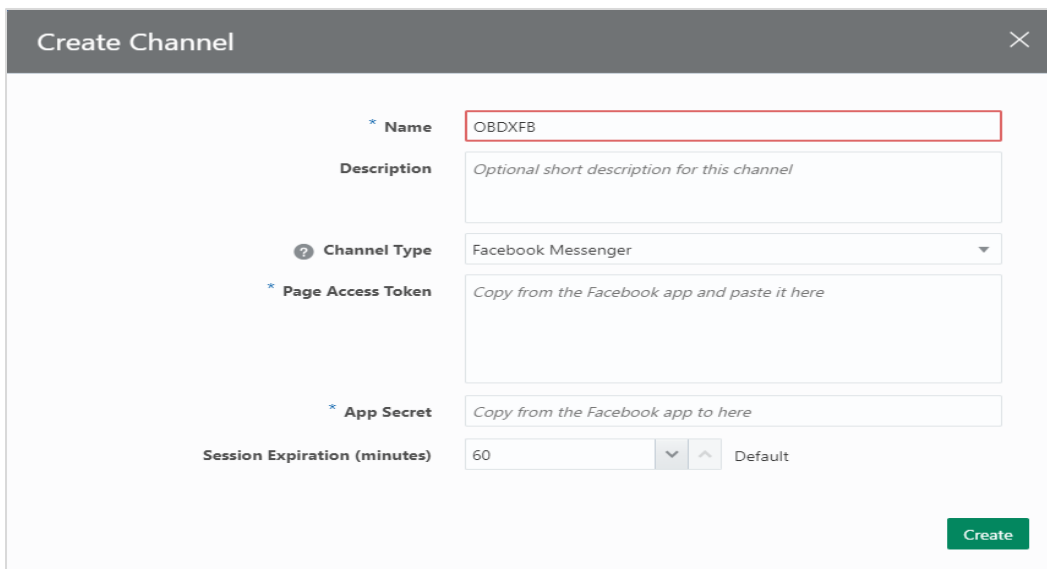


## Create Facebook Channel in ODA

1. In ODA ,click channels in the left panel/menu and then click on users.



2. Next, click Add Channel to open the Create Channel dialog.
3. Choose Facebook Messenger as the channel type.



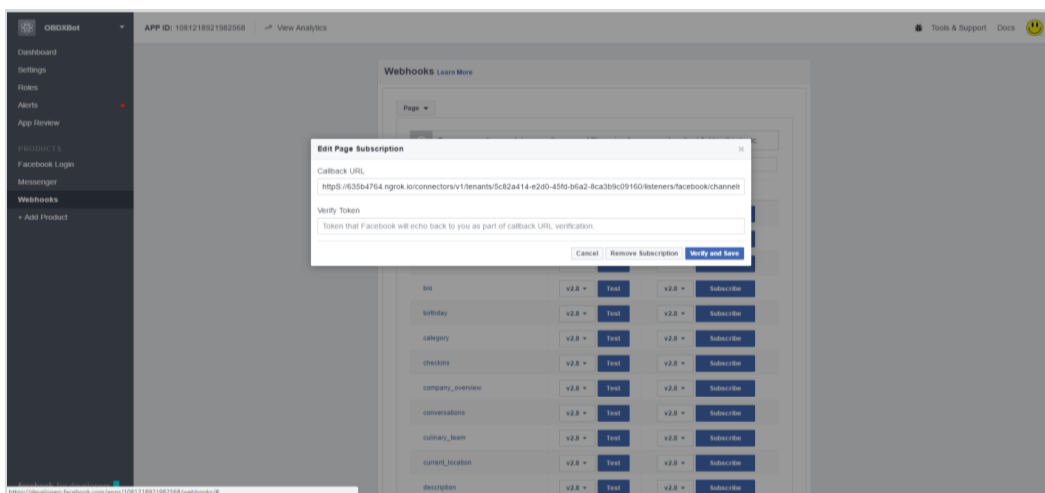
4. In the Page Access Token field, paste the page access token that you generated previously in the Set Up Facebook Messenger procedure.
5. In the App Secret field, paste the app secret that you copied previously in the Set Up Facebook Messenger procedure and click Create.
6. In the Channels page, copy both the Verify Token and WebHook URL and paste them somewhere convenient on your system. You'll need these to configure the Facebook webhook.

The screenshot shows the configuration interface for a channel named 'OBDFXB'. The 'Channel Enabled' toggle is turned 'On'. The 'Channel Type' is set to 'Facebook Messenger'. The 'Verify Token' field contains the value 'wshbC3InSDkmmNPLbR6ufXDlclp4nfQP' and is highlighted with a red rectangular box. Other fields include 'Name', 'Description', 'Page Access Token', 'App Secret', 'Webhook URL', and 'Session Expiration (minutes)'.

7. Select the digital assistant or skill that you want to associate with the channel. Switch on the Channel Enabled control to enable it.

### Configure the Facebook Messenger Webhook

1. In Facebook Messenger, be sure that you've selected the project that you initially created for the webhook.
2. Click Messenger and then choose Settings .
3. Click Subscribe to Events to open the New Page Subscription dialog.
4. Copy the Webhook URL that you got from the Digital Assistant Channels page and paste it in the Callback URL field in the New Page Subscription dialog.
5. Copy the Verify Token generated by Digital Assistant and paste it into the Verify Token field.



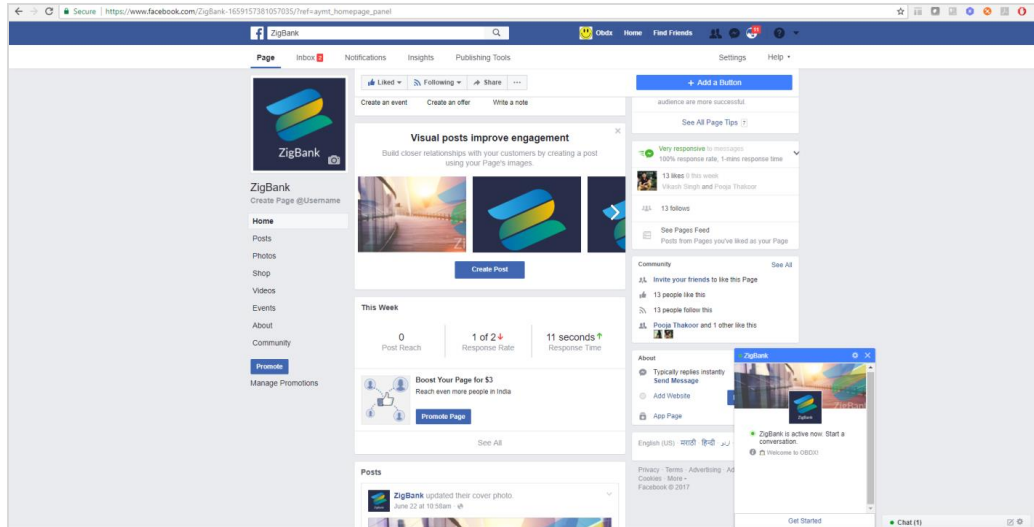
6. Under Subscription Fields, select the messages and messaging\_postbacks callback events. The messages event is triggered whenever someone sends a message to your Facebook page.
7. Click Verify and Save.



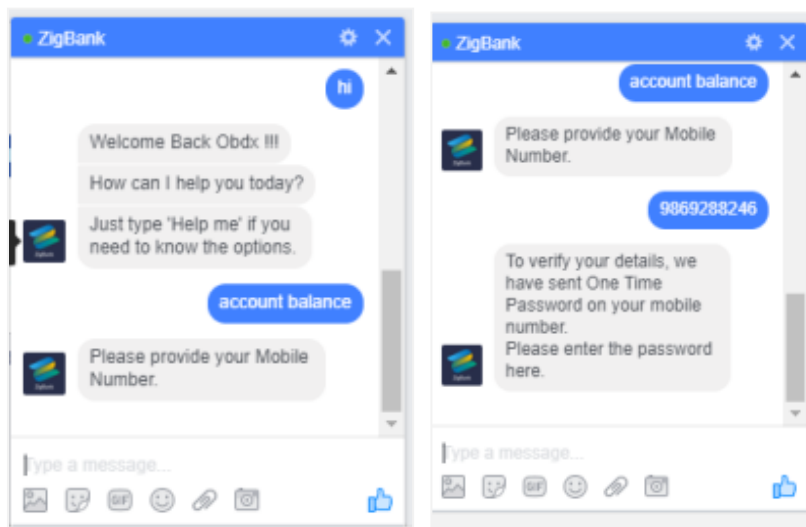
- In the Webhooks section of the Messenger settings, select the Facebook page for your digital assistant (or standalone skill). Click Subscribe.

### Validating configurations

Login to Facebook > Navigate to the page and click > Send message



- Click Get Started in the chat window > You should receive welcome message from ODA
- Enquire about account balance > OTP should be received on the registered email address of the party in core banking



[Home](#)

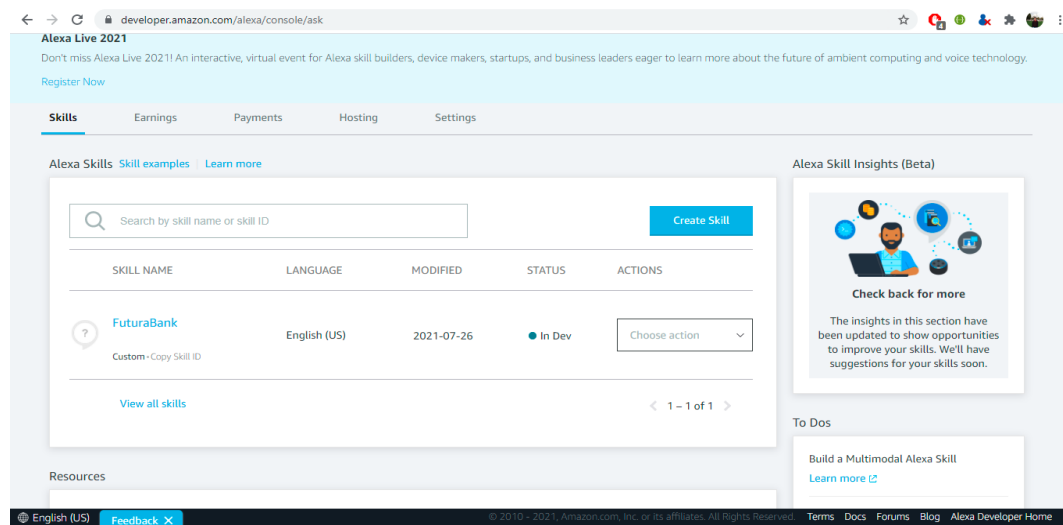
## 5.5 Alexa Channel

Creating an Alexa skill called *Futura Bank* along with a Webhook channel lets you chat with a specific bot.

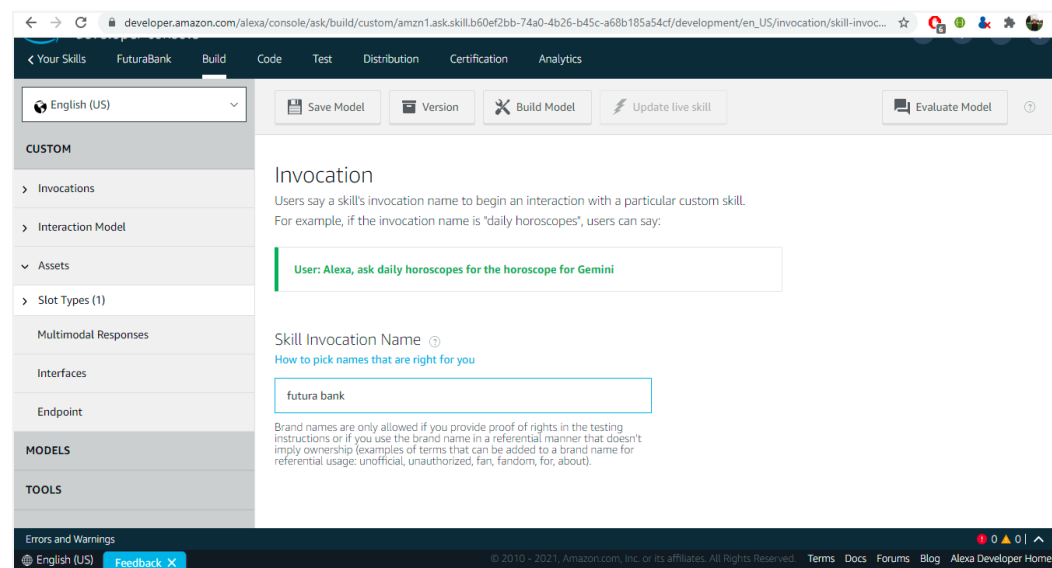
Add the skill information

Set up a developer account in the Amazon Developer Portal.

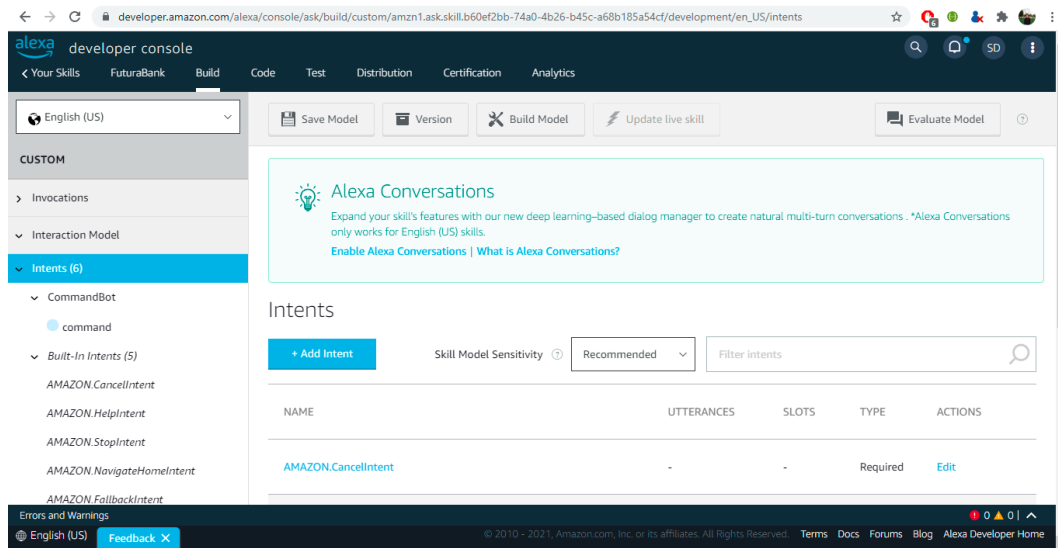
1. Open the [Amazon Developer Console](#).
2. Click on **'Create Skill'**



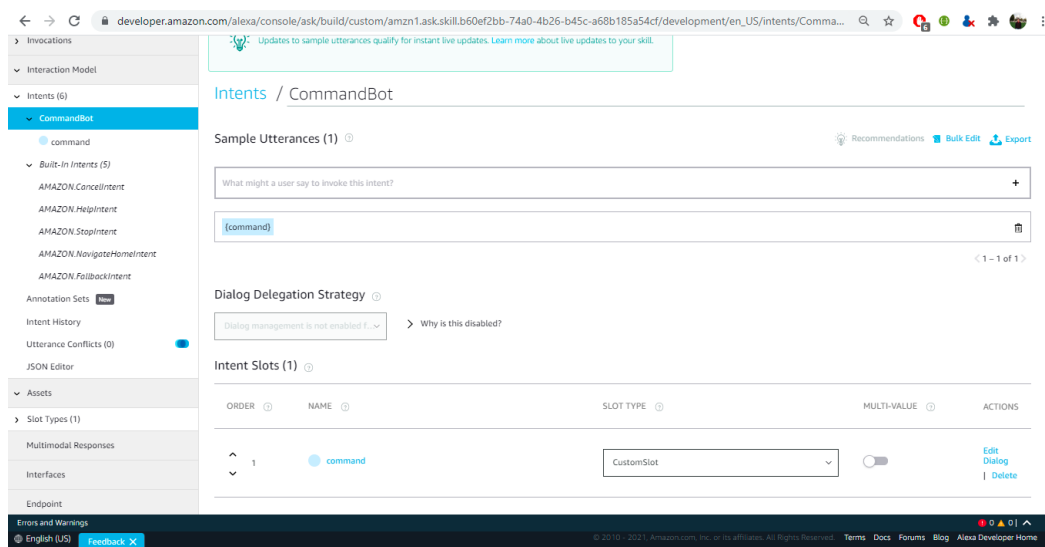
3. Enter Futura Bank (or any name that you want to use to invoke this skill) as the Invocation Name.



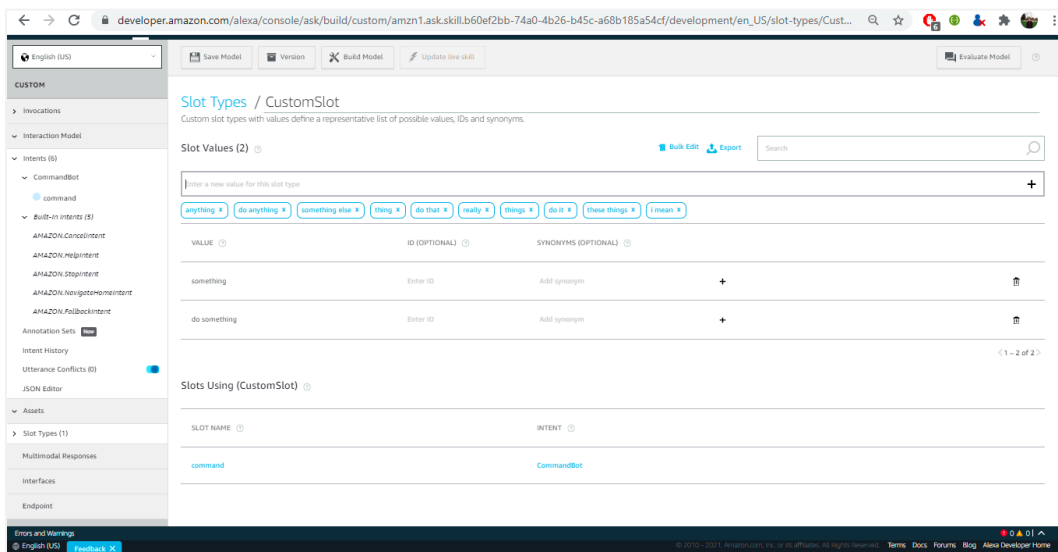
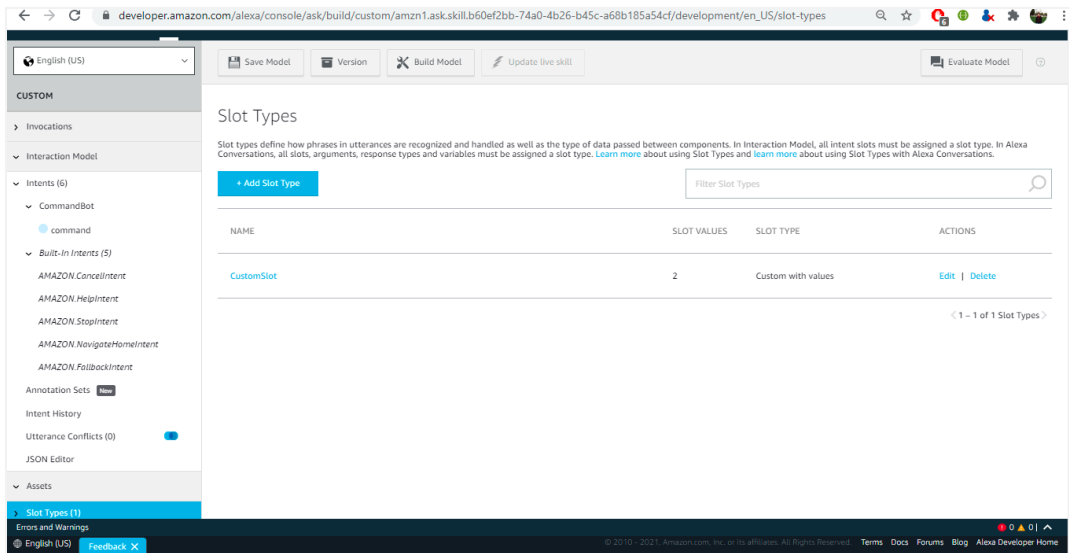
4. Add new intent as CommandBot



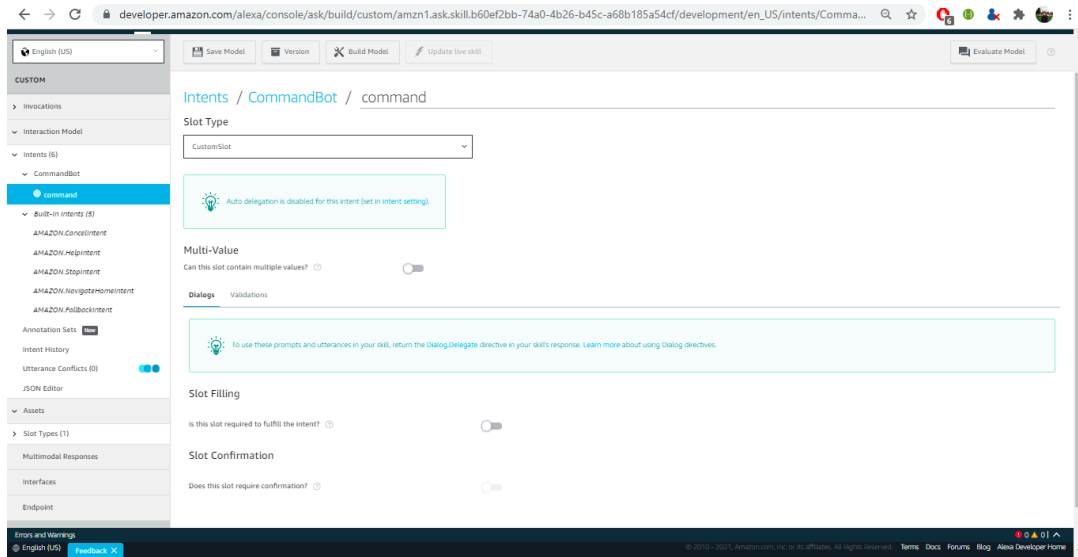
5. Add sample utterance to it



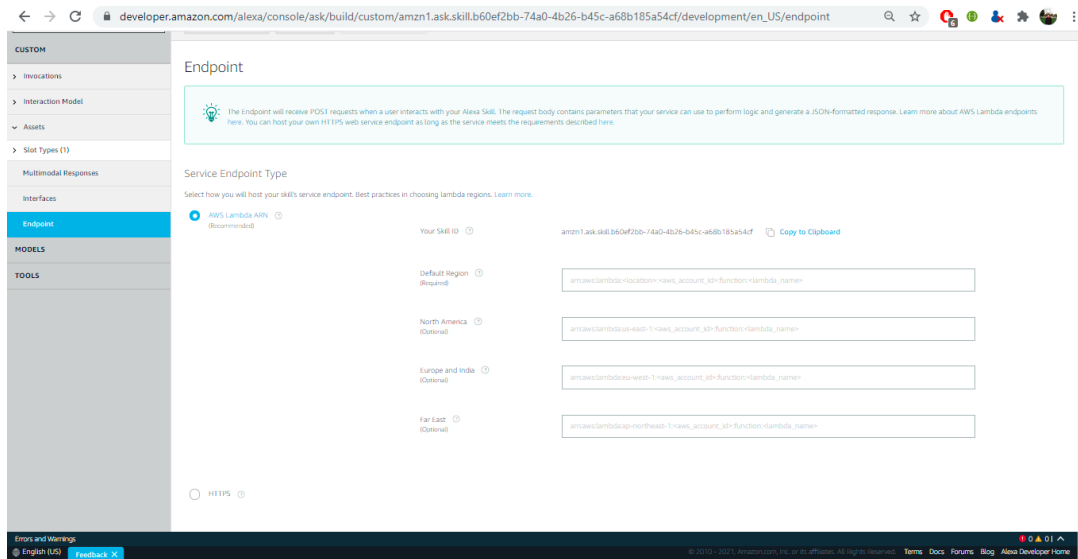
6. Create custom slot



7. Update this CustomSlot in previously added intent

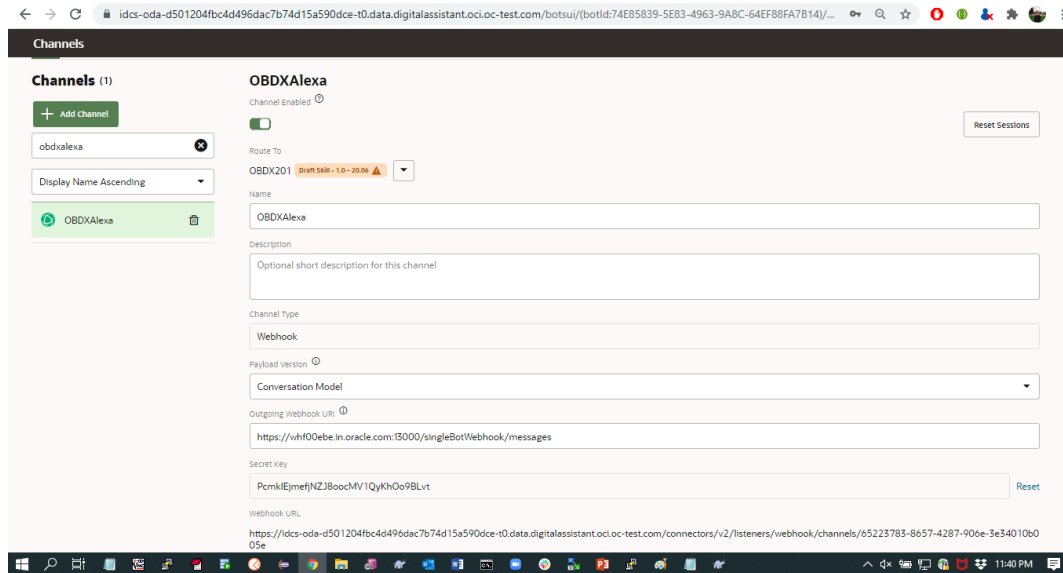


8. Click Build Model in Build Tab
9. Update endpoint and add CA
10. Note the skill ID



## Create a Webhook channel in ODA

1. In the Bot Builder, create a webhook channel for your bot. In the Create Channel dialog, enter the outgoing Webhook URL as **https://bots-samples-nodejs:8889/ext/apps/alexa-singleBot/singleBotWebhook/messages**. This URL is where your bot will send its responses back to the Alexa Futura Bot skill.



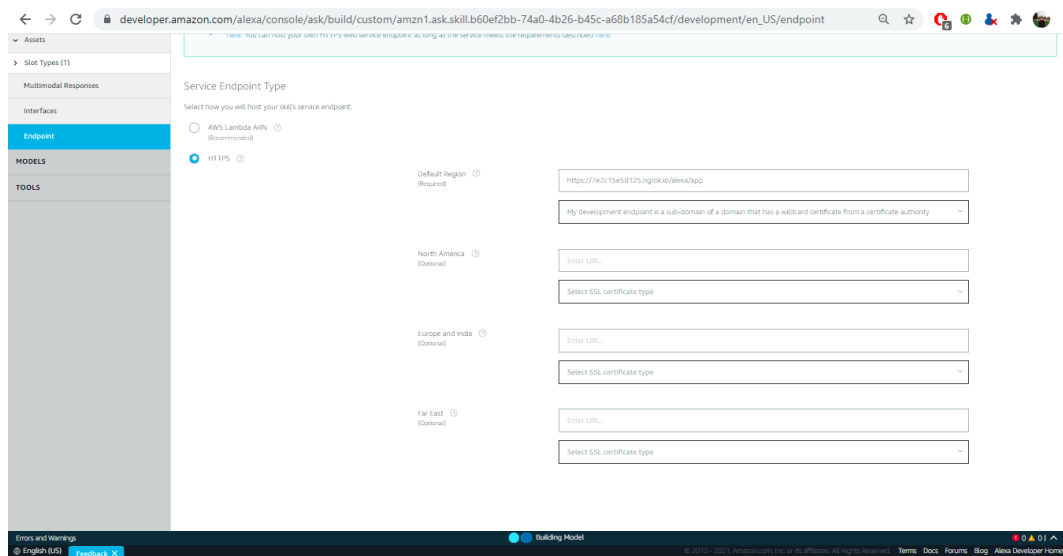
Update amzn\_appld, channelSecretKey & channelUrl in service.js

Run nodeJS script

npm install

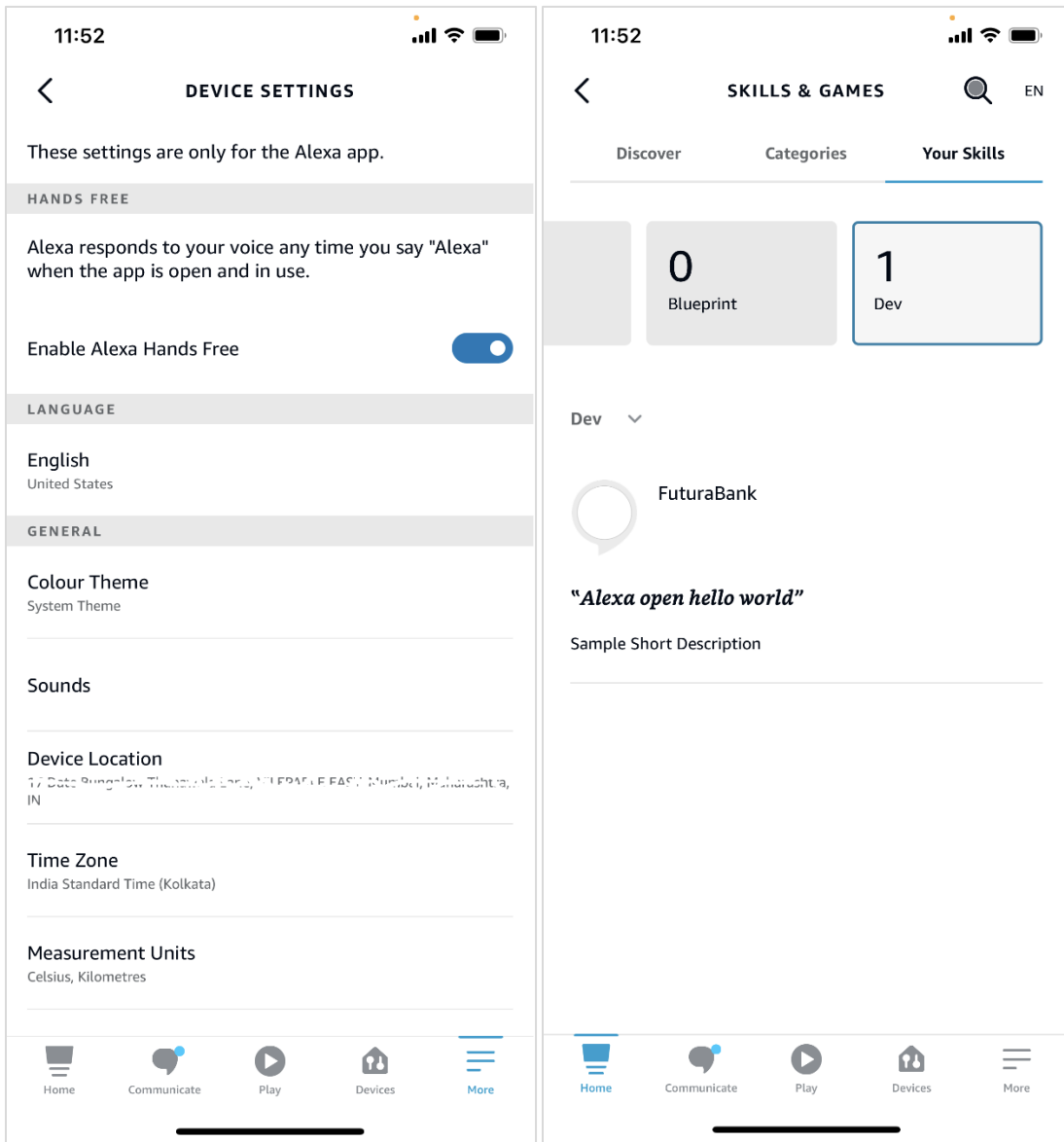
node index.js

This must be publicly hosted in https url. Enter this URL in below screen



2. In the Alexa Mobile App – ensure that the skill is visible

Change the language to English US



## 5.6 WhatsApp Channel

1. Create a channel of type Webhook.
2. Map the Skill to this channel & enable the same.

The screenshot shows the 'Channels' configuration page in ODA. On the left, there is a list of channels with 'OBDX\_Whatsapp' selected. The main area shows the configuration for 'OBDX\_Whatsapp', which is currently 'Channel Enabled'. The configuration includes:

- Channel Type:** Webhook
- Outgoing Webhook URL:** `https://oda-adj.onrender.com/bot/message`
- Secret Key:** `ao3HasDgREZUVVJSTWwWNYB7wFdzou`
- Webhook URL:** `https://oda-ae2ca311e58405abe8c40f4131b850f-d62.data.digitalassistant.oc1.oraclecloud.com/connectors/v2/listeners/webhook/channels/6395807d-e7a6-42a3-968d-3792ad655a7`
- Session Expiration (minutes):** 1,000

3. Obtain the NodeJS script from installer. This script resides between Whatsapp Server & ODA.
4. Complete the configurations as given in Sec 3.8 WhatsApp configurations of Alert Configuration Guide.
5. Note the Webhook URL & secret from above screen & update in NodeJS script.
6. Update the long term whatsapp token in MYTOKEN variable in the script.
7. Run the shared NodeJS script on any public server.
8. Update the url in below Whatsapp Console. The verify token is the one used in mytoken variable in script. Update the outgoing webhook url in ODA channel.

The screenshot shows the 'WhatsApp' configuration page in the Meta for Developers console. The page is titled 'Quickstart > Configuration' and includes the following sections:

- Webhook:** To get alerted when you receive a message or when a message's status has changed, you need to set up a Webhooks endpoint for your app. Learn how to configure Webhooks.
  - Callback URL:** `https://oda-adj.onrender.com/webhook` (with an 'Edit' button)
  - Verify token:** `*****` (with an 'Edit' button)
  - Webhook fields:** messages (with a 'Manage' button)
- Permanent token:** Learn how to create a permanent token
- Phone numbers:** You have 0 production numbers and 1 test number. (with a 'Manage phone numbers' button)
- Test account:** Delete your business. This will unlink your application and delete your business portfolio, test WhatsApp Business Accounts, and phone numbers. (with a 'Delete' button)

[Home](#)