

Chatbot Configuration Guide
Oracle Banking Digital Experience
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Chatbot Configuration Guide

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1. Preface

1.1 Purpose

Welcome to the User Guide for Oracle Banking Digital Experience. This guide explains the operations that the user will follow while using the application.

1.2 Audience

This manual is intended for Customers and Partners who setup and use Oracle Banking Digital Experience.

1.3 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>.

Access to Oracle Support

Oracle customers that have purchased support 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 Critical Patches

Oracle advises customers to get all their security vulnerability information from the Oracle Critical Patch Update Advisory, which is available at [Critical Patches, Security Alerts and Bulletins](#). All critical patches should be applied in a timely manner to ensure effective security, as strongly recommended by [Oracle Software Security Assurance](#).

1.5 Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

1.6 Conventions

The following text conventions are used in this document:

Convention	Meaning

boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>Italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1.7 Screenshot Disclaimer

The images of screens used in this user manual are for illustrative purpose only, to provide improved understanding of the functionality; actual screens that appear in the application may vary based on selected browser, theme, and mobile devices.

1.8 Acronyms and Abbreviations

The list of the acronyms and abbreviations that you are likely to find in the manual are as follows:

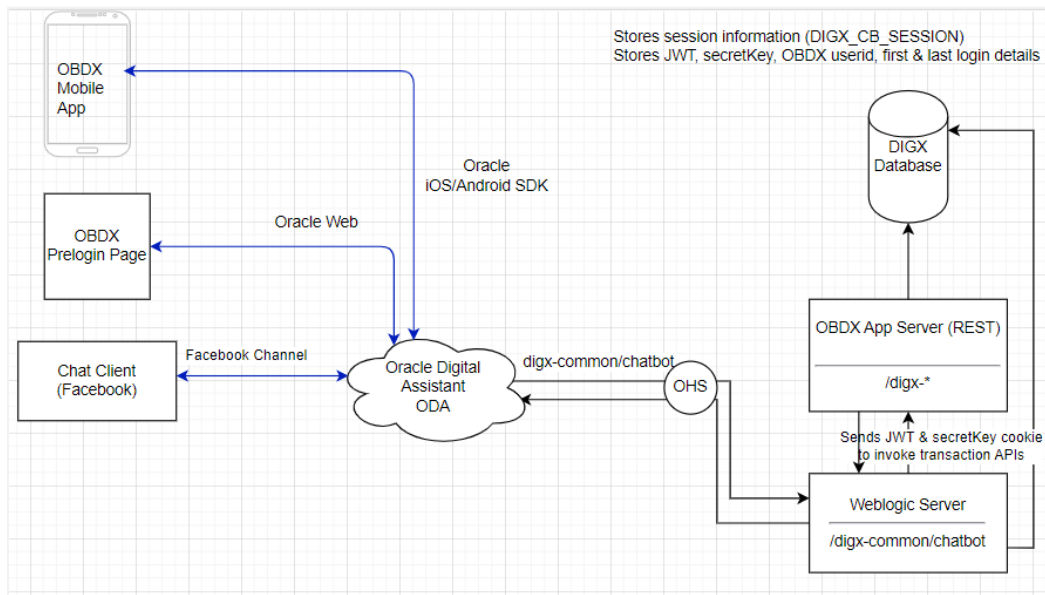
Abbreviation	Description
OBDX	Oracle Banking Digital Experience

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

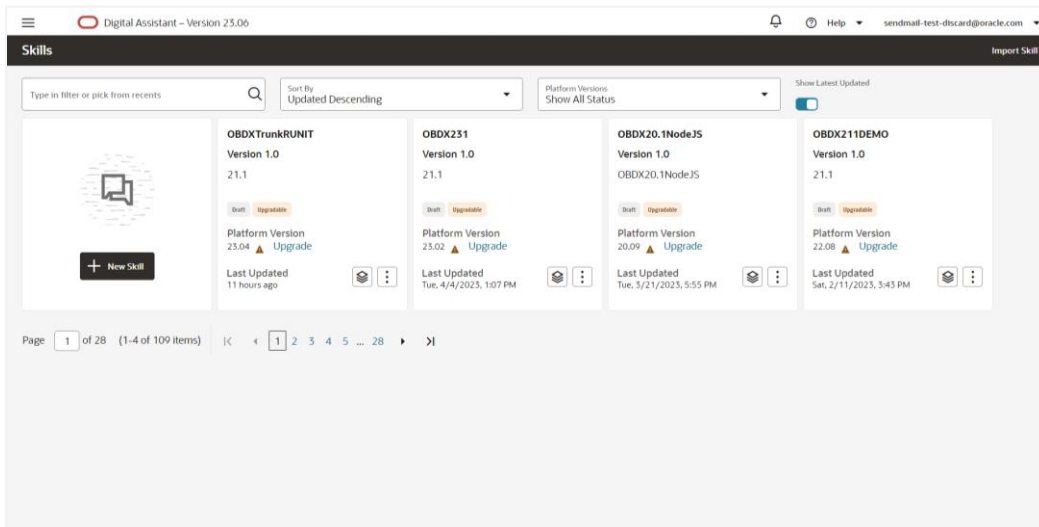
3. Topology



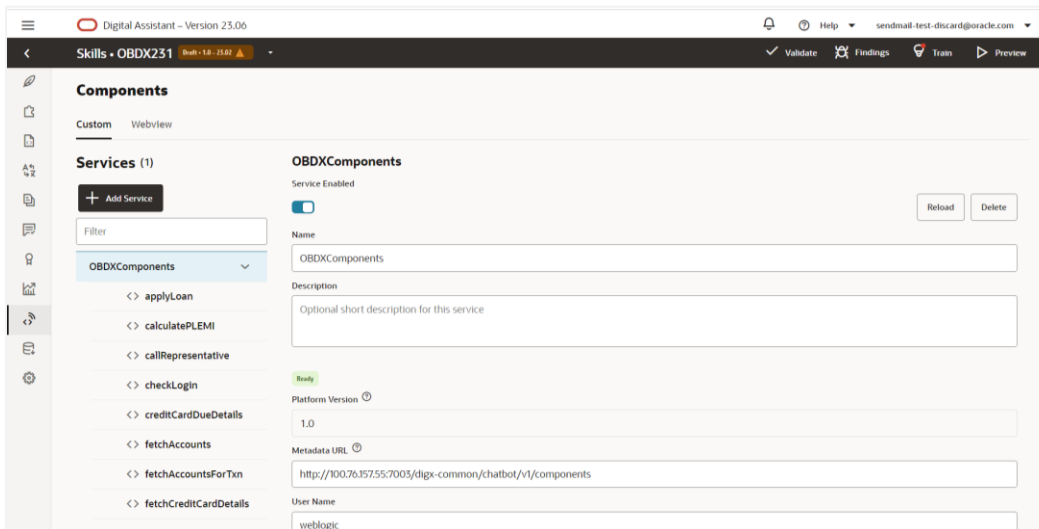
4. Common Configurations

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.

5. 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-

The screenshot shows the 'Settings' page for a skill named 'OBDX231'. The 'Configuration' tab is selected. Under 'System Parameters', the 'Confidence Threshold' is set to 0.5. Other parameters like 'Confidence Win Margin' (0), 'Unexpected Error Prompt', 'Max States Exceeded Error Prompt', 'Expired Session Error Prompt', 'OAuth Cancel Prompt', and 'OAuth Success Prompt' are also visible, each with a text input field containing a system prompt.

Settings

General **Configuration** Digital Assistant Events Q&A Routing Config

System Parameters

Confidence Threshold: 0.5

Confidence Win Margin: 0

Unexpected Error Prompt: \${rb('systemConfiguration_errorUnexpectedErrorPrompt')}

Max States Exceeded Error Prompt: \${rb('systemConfiguration_errorMaxStatesExceededPrompt')}

Expired Session Error Prompt: \${rb('systemConfiguration_errorExpiredSessionPrompt')}

OAuth Cancel Prompt: \${rb('systemConfiguration_oauthCancelPrompt')}

OAuth Success Prompt:

6. 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-

The screenshot shows the 'Resource Bundles' page for the same skill 'OBDX231'. The 'User-Defined' tab is selected. Under 'Keys (1)', there is a key named 'entity'. To the right, the 'DefaultHomeEntity' bundle is shown with a table containing one row: 'default' language with message 'OBDX_BU'.

Resource Bundles

User-Defined Intents Q&A Configuration

Keys (1)

+ Add Key

entity

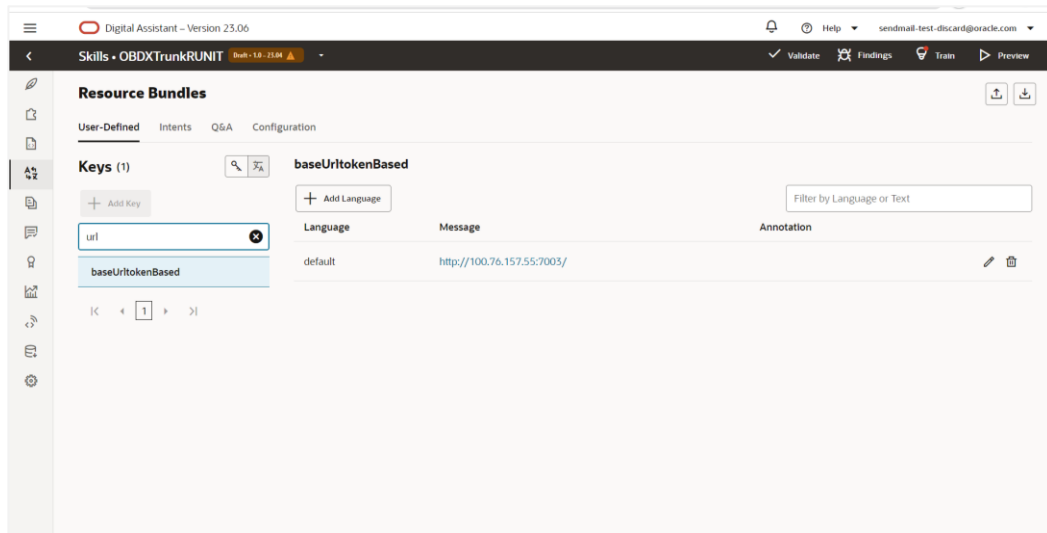
DefaultHomeEntity

DefaultHomeEntity

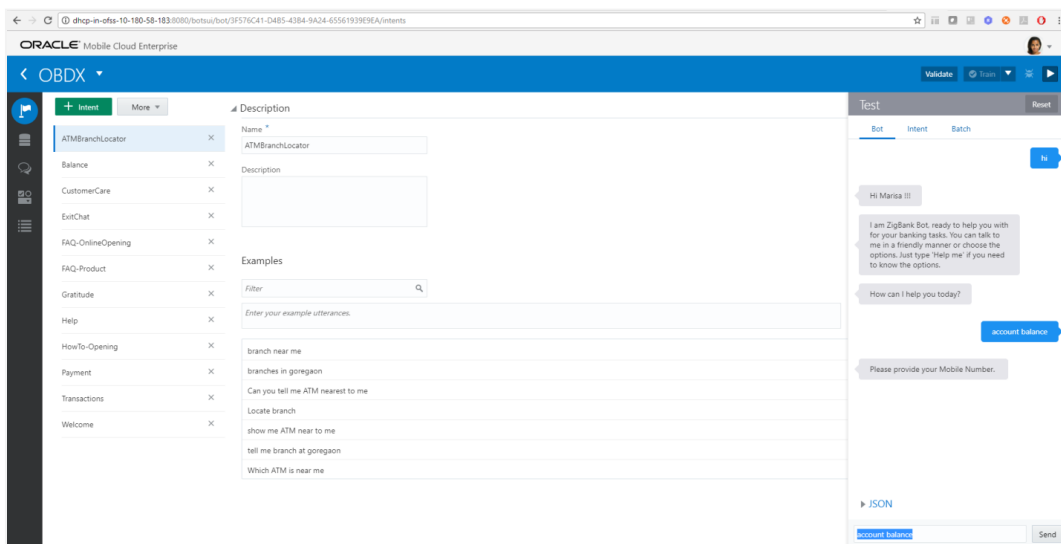
+ Add Language

Language	Message	Annotation
default	OBDX_BU	

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



8. Login to ODA and click OBDXBot > Test



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.

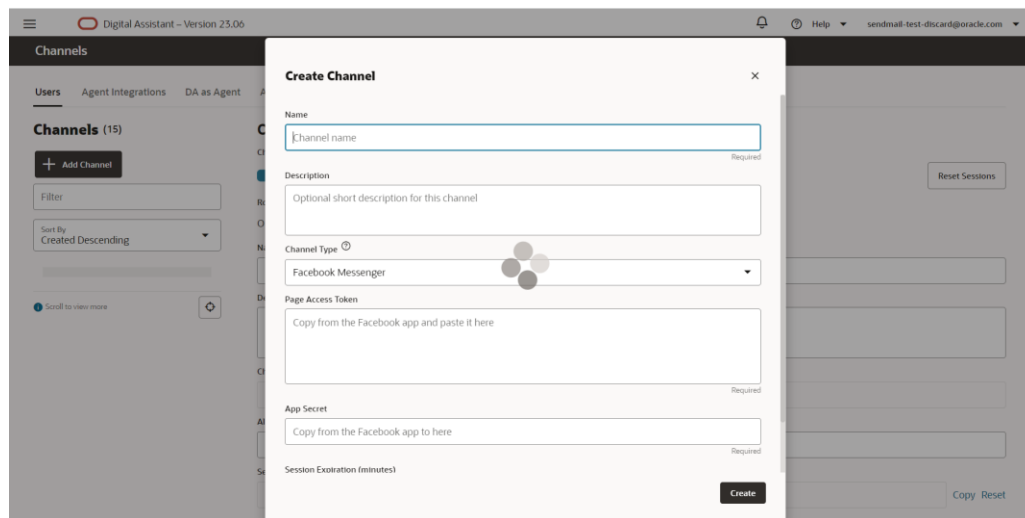
Chatbot widget appears on prelogin page in OBDX UI where the login is with mobile number/(OTP or PIN or Soft Token)

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**.

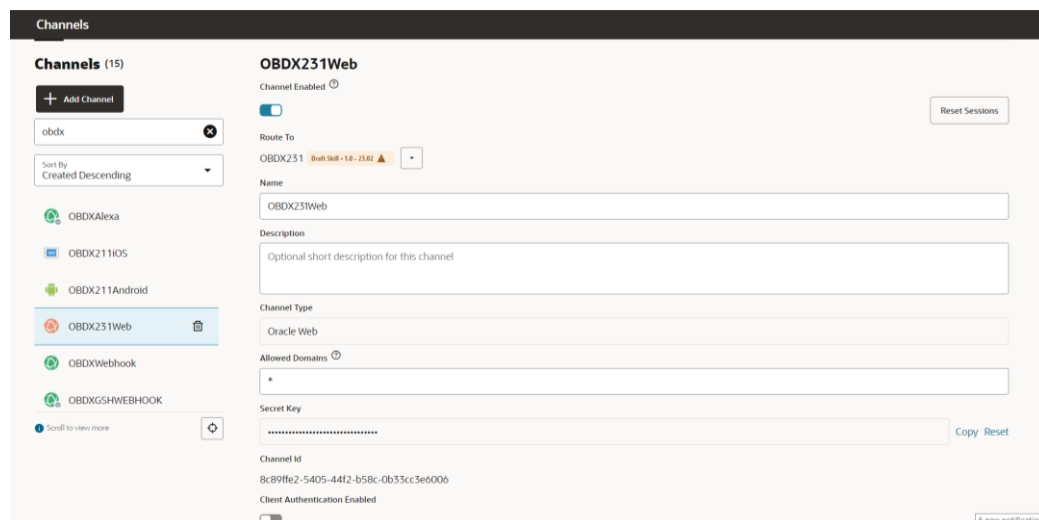


The screenshot shows the 'Create Channel' dialog box in the ODA UI. The dialog has the following fields:

- Name:** A text input field with the placeholder 'Channel name' and a 'Required' label.
- Description:** A text input field with the placeholder 'Optional short description for this channel'.
- Channel Type:** A dropdown menu currently showing 'Facebook Messenger'.
- Page Access Token:** A text input field with the placeholder 'Copy from the Facebook app and paste it here' and a 'Required' label.
- App Secret:** A text input field with the placeholder 'Copy from the Facebook app to here' and a 'Required' label.
- Session Expiration (minutes):** A text input field.

At the bottom right of the dialog is a 'Create' button. The background shows the 'Channels' list with 15 items and an 'Add Channel' button.

2. Create Oracle Web as the channel type.



The screenshot shows the 'Channels' list on the left and the configuration for the 'OBDX231Web' channel on the right.

Channels List:

- Channels (15)
- + Add Channel
- Filter: obdx
- Sort By: Created Descending
- Channels: OBDXAlexa, OBDX211IOS, OBDX211Android, OBDX231Web (selected), OBDXWebhook, OBDXGSHWEBHOOK

OBDX231Web Configuration:

- Channel Enabled: ☒
- Route To: OBDX231 (with a warning icon)
- Name: OBDX231Web
- Description: Optional short description for this channel
- Channel Type: Oracle Web
- Allowed Domains: *
- Secret Key: [Redacted] (with Copy and Reset buttons)
- Channel Id: 8c89ffe2-5405-4412-b58c-0b33cc3e6006
- Client Authentication Enabled: ☐

At the bottom right, there is a 'Reset Sessions' button and a notification '6 new notifications'.

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

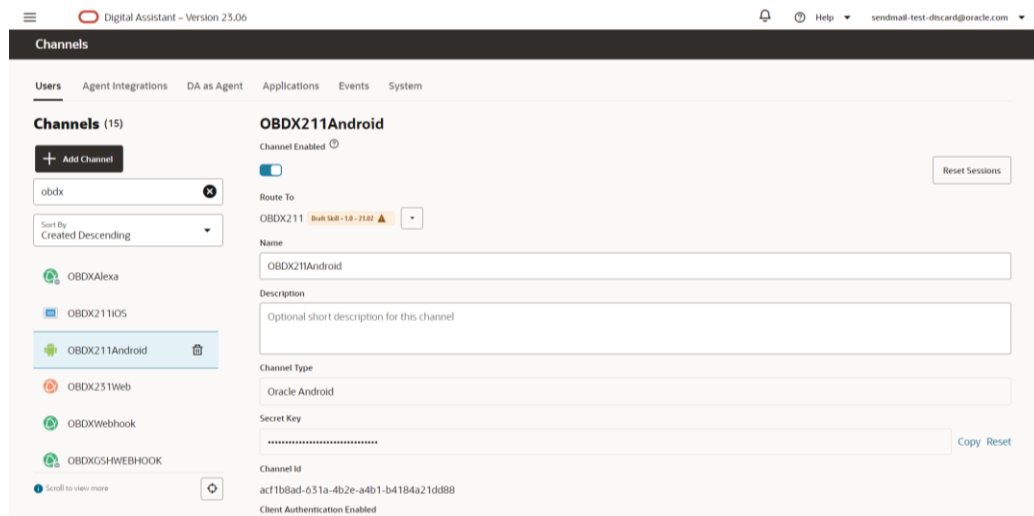
To remove this chatbot widget

- 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.

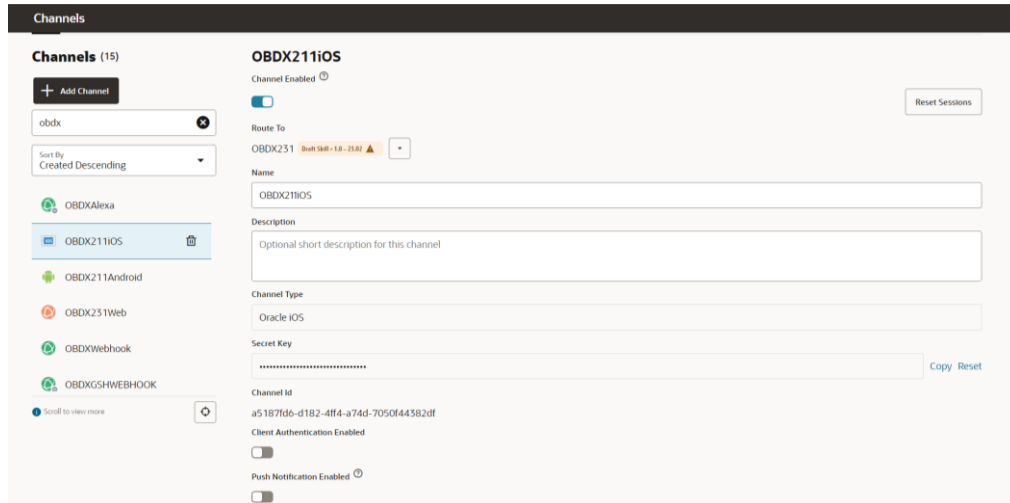


3. Route the channel to your skill or digital assistant.
4. Switch Channel Enabled to On.
5. Note the channel Id. This is required in app configuration

5.3 iOS Channel

In order to configure this channel:

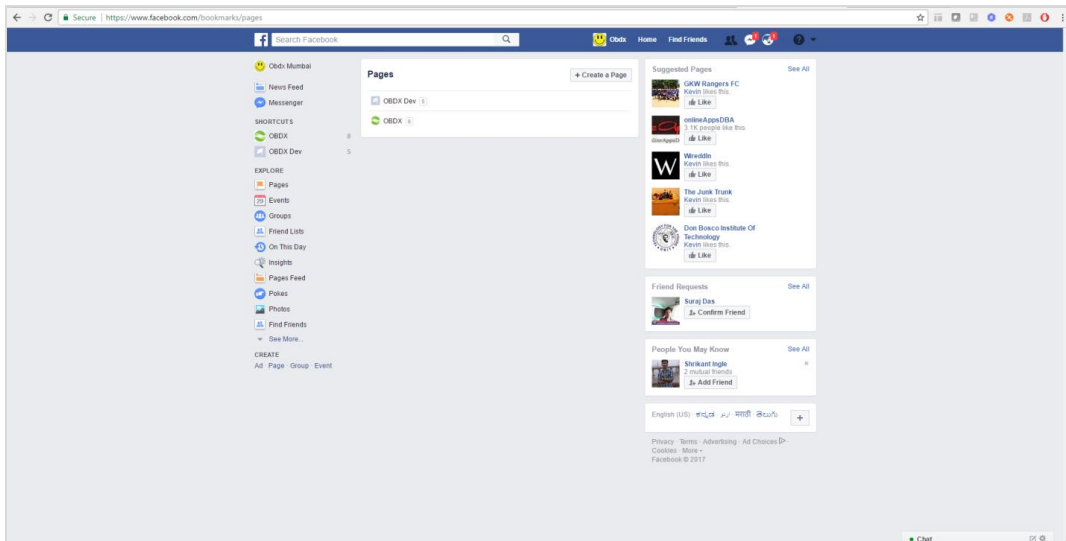
1. Choose Development->Channels->Users from the menu. Click Add Channel.
2. Add Oracle iOS as the channel type.



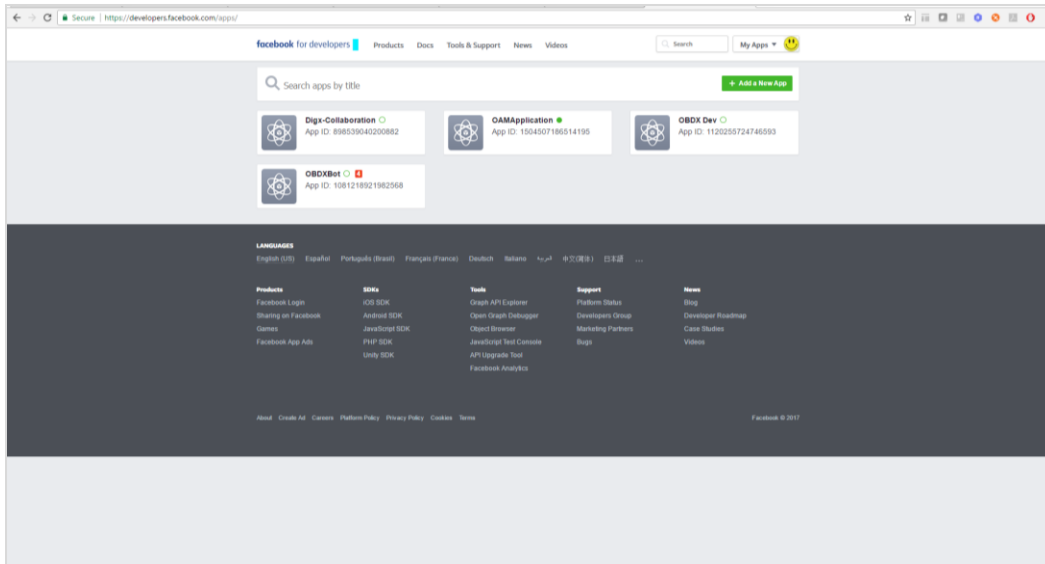
3. Route the channel to your skill or digital assistant.
4. Switch Channel Enabled to On.
5. Note the channel Id. This is required in app configuration

5.4 Facebook Channel

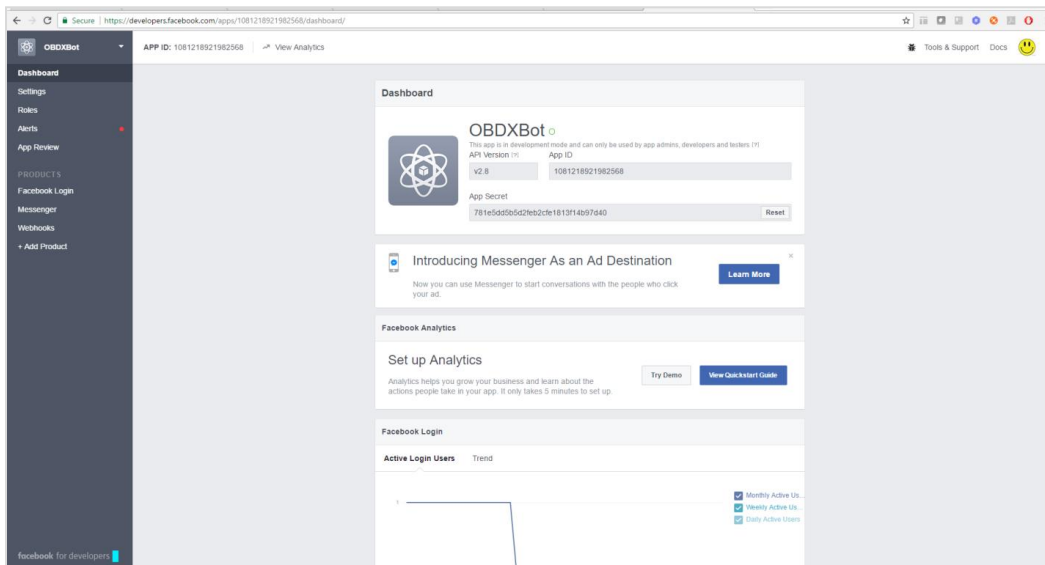
1. Create a Facebook account for the Bank. Login to Facebook with credentials.
2. Create a new page



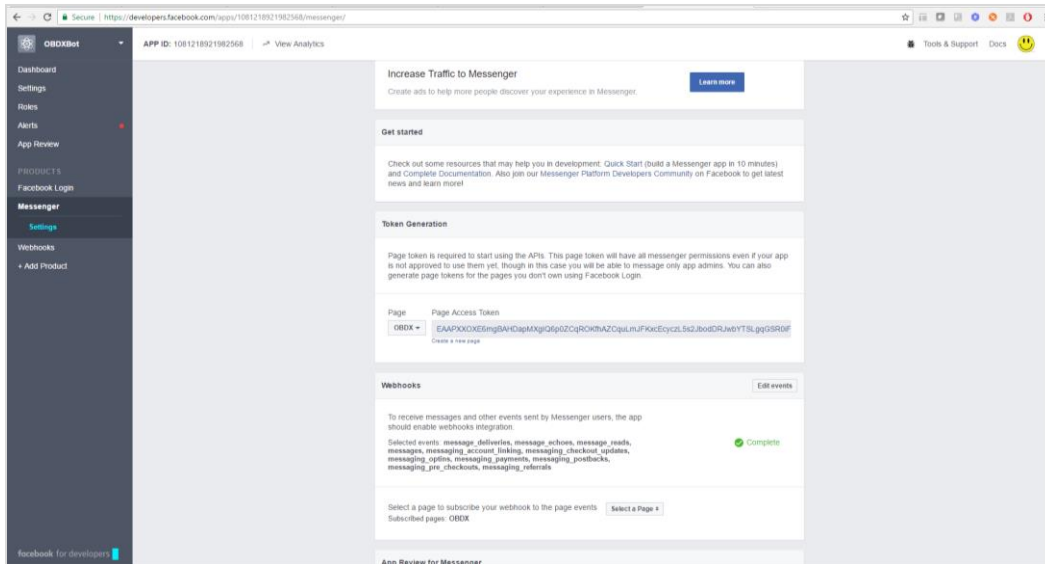
3. Navigate to developer link and create an application as shown below



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

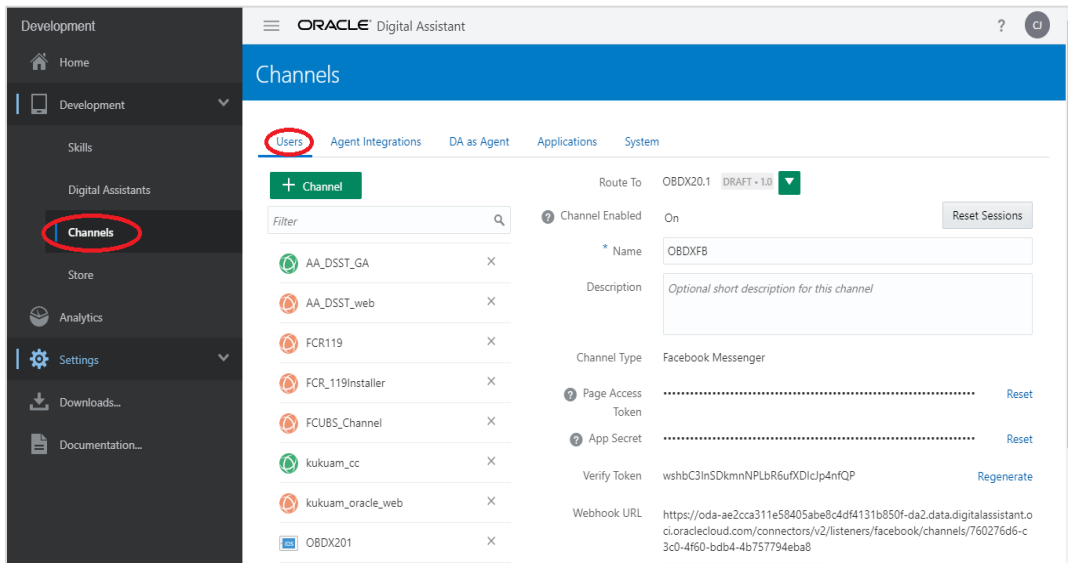


5. Navigate to Messenger > Settings page from left panel and in token generation section select the page created previously. Note the page access token.



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.

The 'Create Channel' dialog box is shown. It has a title bar with 'Create Channel' and a close button. The form contains the following fields:

- * Name:** A text input field with the value 'OBDXFB' and a red border.
- Description:** A text input field with the placeholder text 'Optional short description for this channel'.
- Channel Type:** A dropdown menu with 'Facebook Messenger' selected.
- * Page Access Token:** A text input field with the placeholder text 'Copy from the Facebook app and paste it here'.
- * App Secret:** A text input field with the placeholder text 'Copy from the Facebook app to here'.
- Session Expiration (minutes):** A numeric input field with the value '60' and a 'Default' button.

A green 'Create' button is located at the bottom right of the dialog.

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.

Route To: OBDX20.1 DRAFT - 1.0 ▼

Channel Enabled On Reset Sessions

Name OBDXFB

Description *Optional short description for this channel*

Channel Type Facebook Messenger

Page Access Token Reset

App Secret Reset

Verify Token wshbC3lnSDkmmNPLbR6ufXDclp4nfQP Regenerate

Webhook URL https://oda-ae2cca311e58405abe8c4df4131b850f-da2.data.digitalassistant.oci.oraclecloud.com/connectors/v2/listeners/facebook/channels/760276d6-c3c0-4f60-bdb4-4b757794eba8

Session Expiration (minutes) 60 ▼ ▲ Default

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.

OBDX20.1 APP ID: 1081218921982566 View Analytics Tools & Support Docs

Webhooks Learn More

Edit Page Subscription

Callback URL
https://633b4764.ngrok.io/connectors/v1/tenants/5c12a414-e2d0-45f6-b6a2-8ca39c09160/listeners/facebook/channels

Verify Token
Token that Facebook will echo back to you as part of callback URL verification

Cancel Remove Subscription Verify and Save

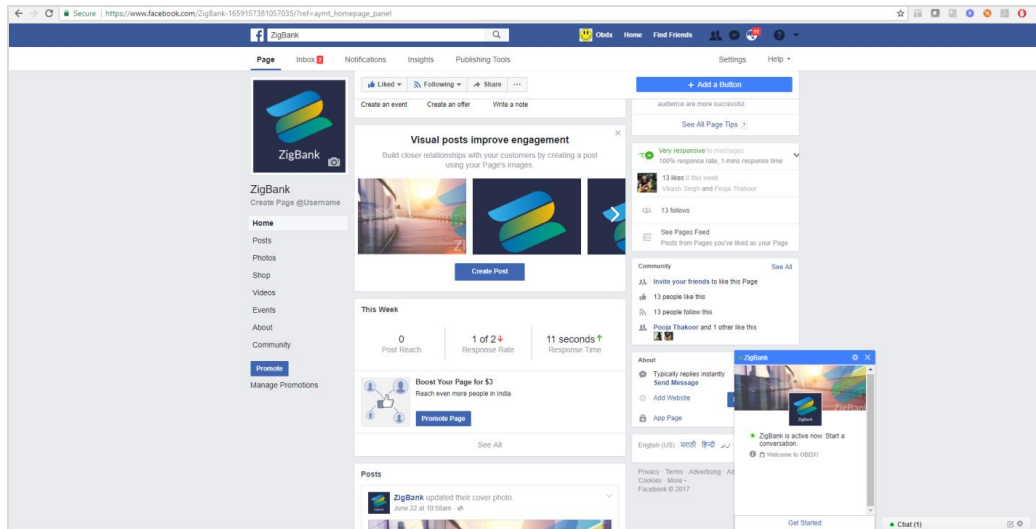
Field	v2.0	Test	v2.0	Subscribe
birthday	v2.0	Test	v2.0	Subscribe
category	v2.0	Test	v2.0	Subscribe
checkins	v2.0	Test	v2.0	Subscribe
company_overview	v2.0	Test	v2.0	Subscribe
conversations	v2.0	Test	v2.0	Subscribe
customer_team	v2.0	Test	v2.0	Subscribe
current_location	v2.0	Test	v2.0	Subscribe
description	v2.0	Test	v2.0	Subscribe

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.

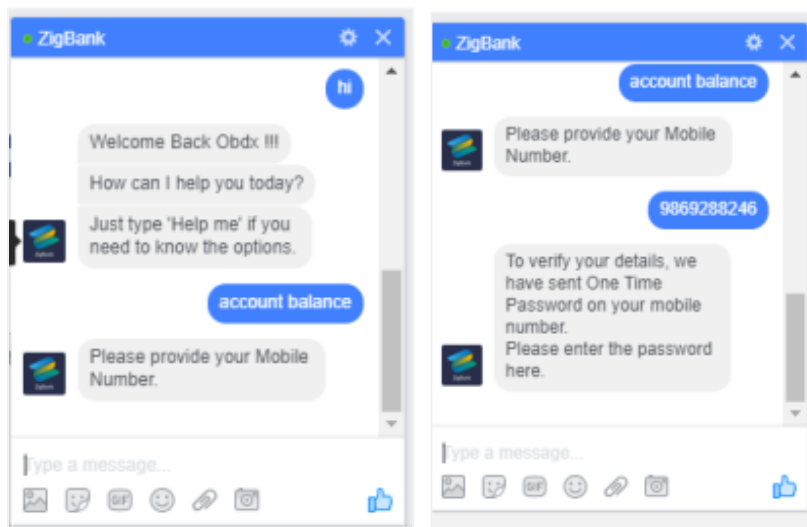
8. In the Webhooks section of the Messenger settings, select the Facebook page for your digital assistant (or standalone skill). Click Subscribe.

Validating configurations

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



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



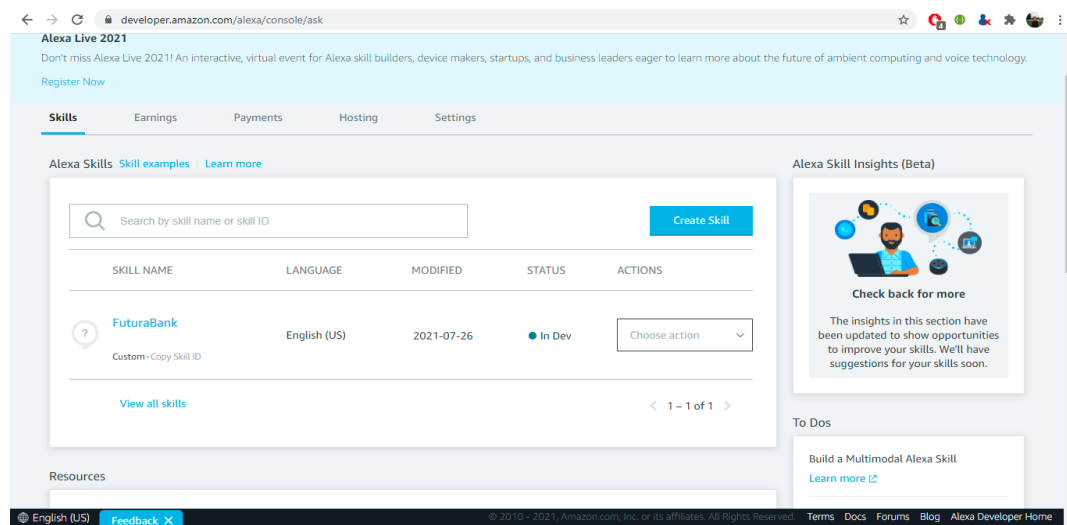
5.5 Alexa Channel

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

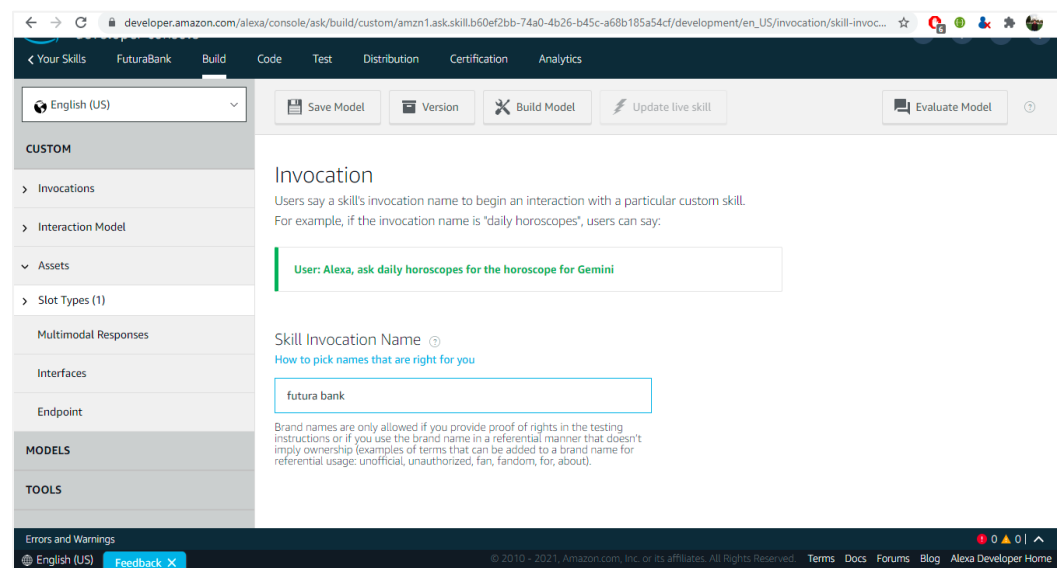
Add the skill information

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.

developer.amazon.com/alexa/console/ask/build/custom/amzn1.ask.skill.b60ef2bb-74a0-4b26-b45c-a68b185a54cf/development/en_US/intents

alexa developer console

English (US)

Save Model Version Build Model Update live skill Evaluate Model

CUSTOM

- Invocations
- Interaction Model
- Intents (5)**
 - CommandBot
 - command
 - Built-In Intents (5)
 - AMAZON.CancelIntent
 - AMAZON.HelpIntent
 - AMAZON.StopIntent
 - AMAZON.NavigateHomeIntent
 - AMAZON.FallbackIntent

Alexa Conversations
Expand your skill's features with our new deep learning-based dialog manager to create natural multi-turn conversations. *Alexa Conversations only works for English (US) skills.
[Enable Alexa Conversations](#) | [What is Alexa Conversations?](#)

Intents

+ Add Intent Skill Model Sensitivity Recommended Filter intents

NAME	UTTERANCES	SLOTS	TYPE	ACTIONS
AMAZON.CancelIntent	-	-	Required	Edit

Errors and Warnings English (US) Feedback

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5. Add sample utterance to it.

developer.amazon.com/alexa/console/ask/build/custom/amzn1.ask.skill.b60ef2bb-74a0-4b26-b45c-a68b185a54cf/development/en_US/intents/CommandBot

Updates to sample utterances qualify for instant live updates. Learn more about live updates to your skill.

Intents / CommandBot

Sample Utterances (1)

What might a user say to invoke this intent?

(command)

Dialog Delegation Strategy

Dialog management is not enabled for this intent. Why is this disabled?

Intent Slots (1)

ORDER	NAME	SLOT TYPE	MULTI-VALUE	ACTIONS
1	command	CustomSlot		Edit Dialog Delete

Errors and Warnings English (US) Feedback

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6. Create custom slot.

Slot Types

Slot types define how phrases in utterances are recognized and handled as well as the type of data passed between components. In Interaction Model, all intent slots must be assigned a slot type. In Alexa Conversations, all slots, arguments, response types and variables must be assigned a slot type. [Learn more](#) about using Slot Types and [learn more](#) about using Slot Types with Alexa Conversations.

[+ Add Slot Type](#)

NAME	SLOT VALUES	SLOT TYPE	ACTIONS
CustomSlot	2	Custom with values	Edit Delete

< 1 - 1 of 1 Slot Types >

Slot Types / CustomSlot

Custom slot types with values define a representative list of possible values, IDs and synonyms.

[Bulk Edit](#) [Export](#)

Enter a new value for this slot type

[anything](#) [do anything](#) [something else](#) [thing](#) [do that](#) [really](#) [things](#) [do it](#) [these things](#) [I mean](#)

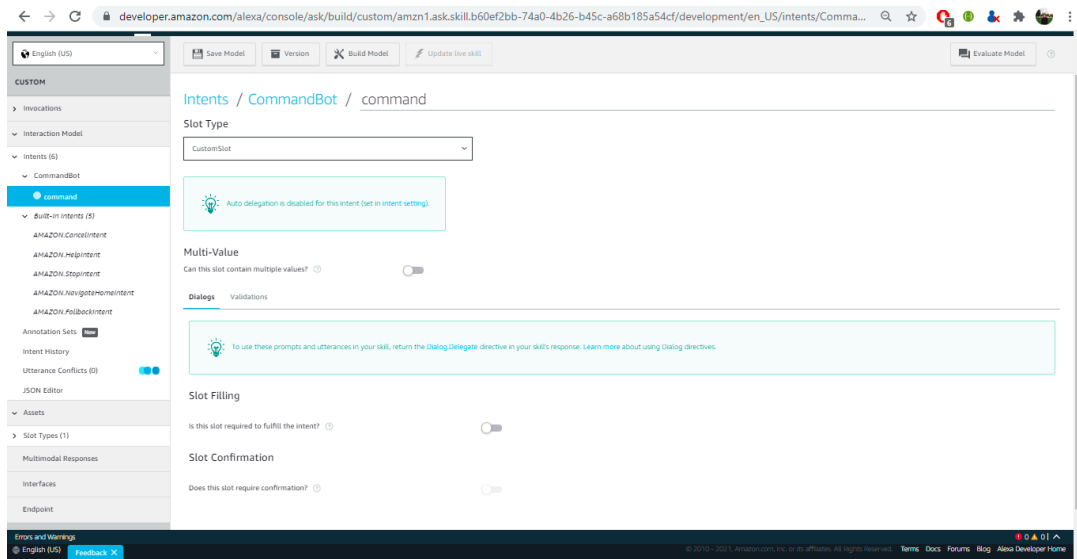
VALUE	ID (OPTIONAL)	SYNONYMS (OPTIONAL)	
something	<input type="text" value="Enter ID"/>	<input type="text" value="Add synonym"/>	+
do something	<input type="text" value="Enter ID"/>	<input type="text" value="Add synonym"/>	+

< 1 - 2 of 2 >

Slots Using (CustomSlot)

SLOT NAME	INTENT
command	CommandBot

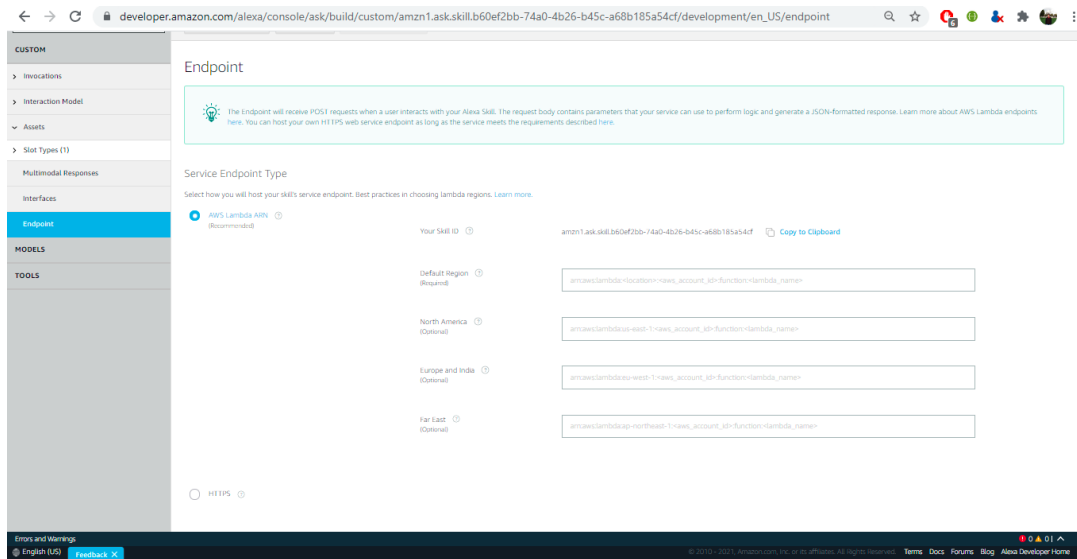
7. Update this CustomSlot in previously added intent.



8. Click Build Model in Build tab.

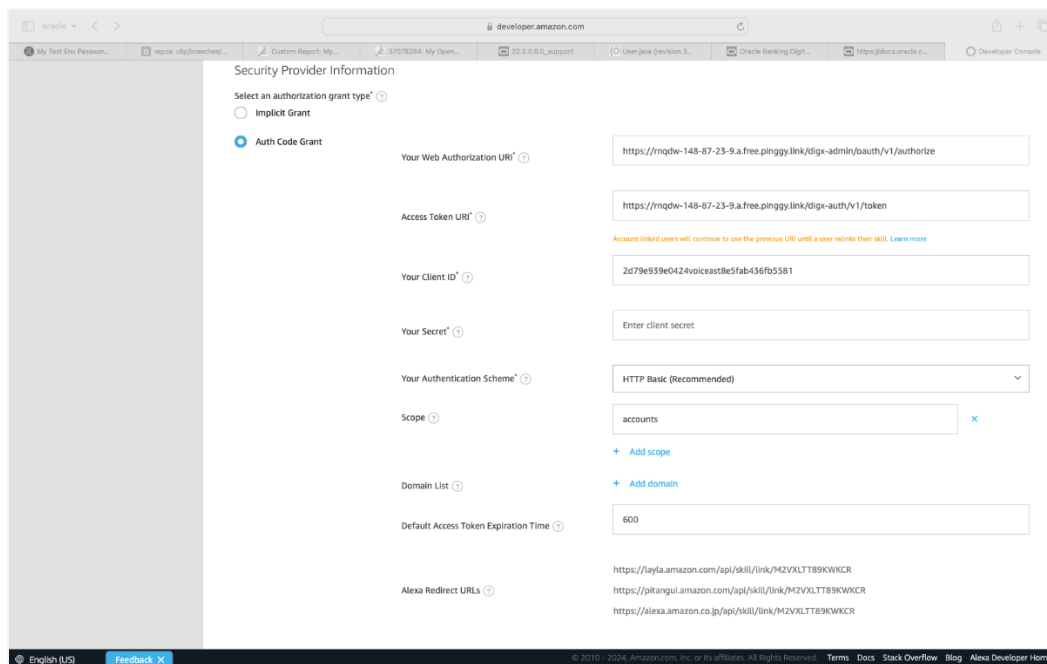
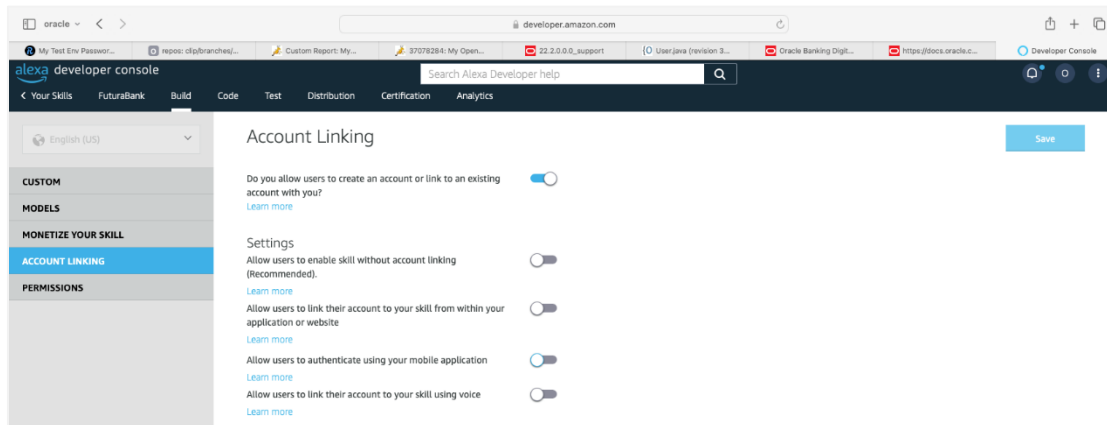
9. Update endpoint and add CA.

10. Note the skill ID.



Setup Account Linking for Alexa

1. Go to Account Linking Tab in Alexa console and enable “allow users to create an account or link to an existing account”.
2. In Security Provider Information select “Auth Code Grant” and set your web authorization uri ,and access token URI.
3. Set scope to “accounts” .



4. Set the client Id for client from client Maintenance page for “OBDXVoiceAstDomain” identity domain client.
5. Click Edit and set the client secret for the above client.

Client Maintenance

Client Definition

Client Id: 2d79e939e0424voiceast8e5fab436fb5581

Client Name: OBDXVoiceAstClient

Client Description: OBDXVoiceAstClient

Identity Domain: OBDXVoiceAstDomain

Client Type: Confidential Client

Grant Type: AUTHORIZATION_CODE, PASSWORD, REFRESH_TOKEN

Routing Method: Normal OAuth

Redirect URL

Redirect URL: https://pitangulamazon.com/api/skill/link/M2VXLT89KWKCR, https://alexa.amazon.co.jp/api/skill/link/M2VXLT89KWKCR, https://alexa.amazon.com/api/skill/link/M2VXLT89KWKCR

Scope

Resource Server: OBDXVoiceAstServer

6. Go to Resource Server Maintenance page and select Identity domain to OBDXVoiceAstDomain.
7. Edit the Scope Name of SCO2 to “accounts” and Scope Description to “accounts”.

Resource Server Maintenance

Resource Server Definition

Resource Server Name: OBDXVoiceAstServer

Resource Server Description: OBDXVoiceAstServer

Identity Domain: OBDXVoiceAstDomain

Scopes

Scope Name: accounts, Scope Description: accounts

Scope Name: SCO5, Scope Description: Payments

Add Scope

Save, Cancel, Back

8. Go to Touch Point Maintenance Page and search for “Voice Assistant Banking” touch point name.
9. Add “accounts” scope to the list of scopes and add upload your bank logo.
10. Enable Touch point status.

Touch Point Maintenance

Touch Point Id: APVOICEAST

Touch Point Name: Voice Assistant Banking

Touch Point Type: ☐ Internal ☒ External

Client Id: 2d79e939e0424voiceast8e5fab436fb5581

Scope:

Account Balance Inquiry X

Account Details Inquiry X

Domestic Transfers X

International Transfers X

Internal Transfers X

accounts X

Upload Logo: ☐ png:tree-rainbow-curves-abstract-colorful-background-image_2164067.jpg

Touch Point Status: ☐

Headless Mode: ☐

Two Factor Authentication: ☐

Self On Board Touch Points: ☐

Skip First Time Login Flow: ☐

Consent Required: ☐

[Save](#) [Cancel](#) [Back](#)

11. Go to role transaction Mapping page and create an external user and add accounts scope.

Role Transaction Mapping

Application Role Creation 2 Map Transaction

Application Role Name: accounts

Description: accounts

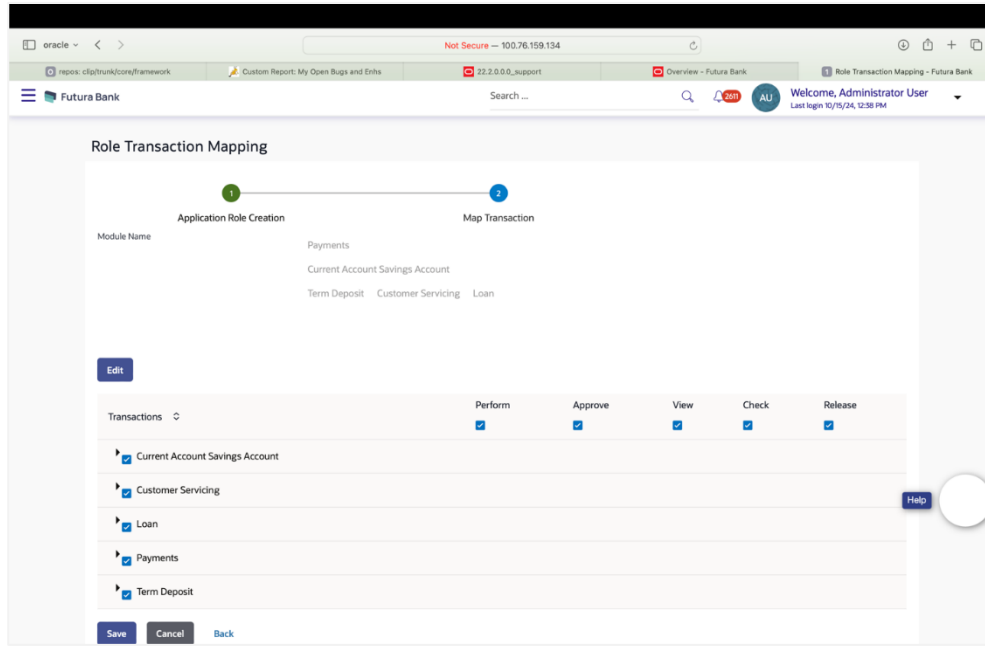
User Type: Retail User

Touch Point Type: ☐ Internal ☒ External

Scope Name: accounts

[Map Transaction](#) [Cancel](#) [Back](#)

12. Add module “current account savings account” , “term deposit” , “customer servicing” and “loan”, “payments”.



13. Set the 'CODE_CHALLENGE_FLAG' , 'OPAQUE_ACCESS_TOKEN_FLAG' flags to N in auth_config table.

```
update auth_config set prop_value='N' where prop_id='CODE_CHALLENGE_FLAG';
```

```
update auth_config set prop_value='N' where prop_id='OPAQUE_ACCESS_TOKEN_FLAG';
```

14. Update token_expiry in digx_au table for OBDXVoiceAstDomain domain_id

```
update DIGX_AU_tokendetail set TOKEN_EXPIRY=600 where DOMAIN_ID='c733dee8-6e4f-4400-8170-cf7c6ef98165';
```

15. Restart the server.

Create a Webhook channel in ODA

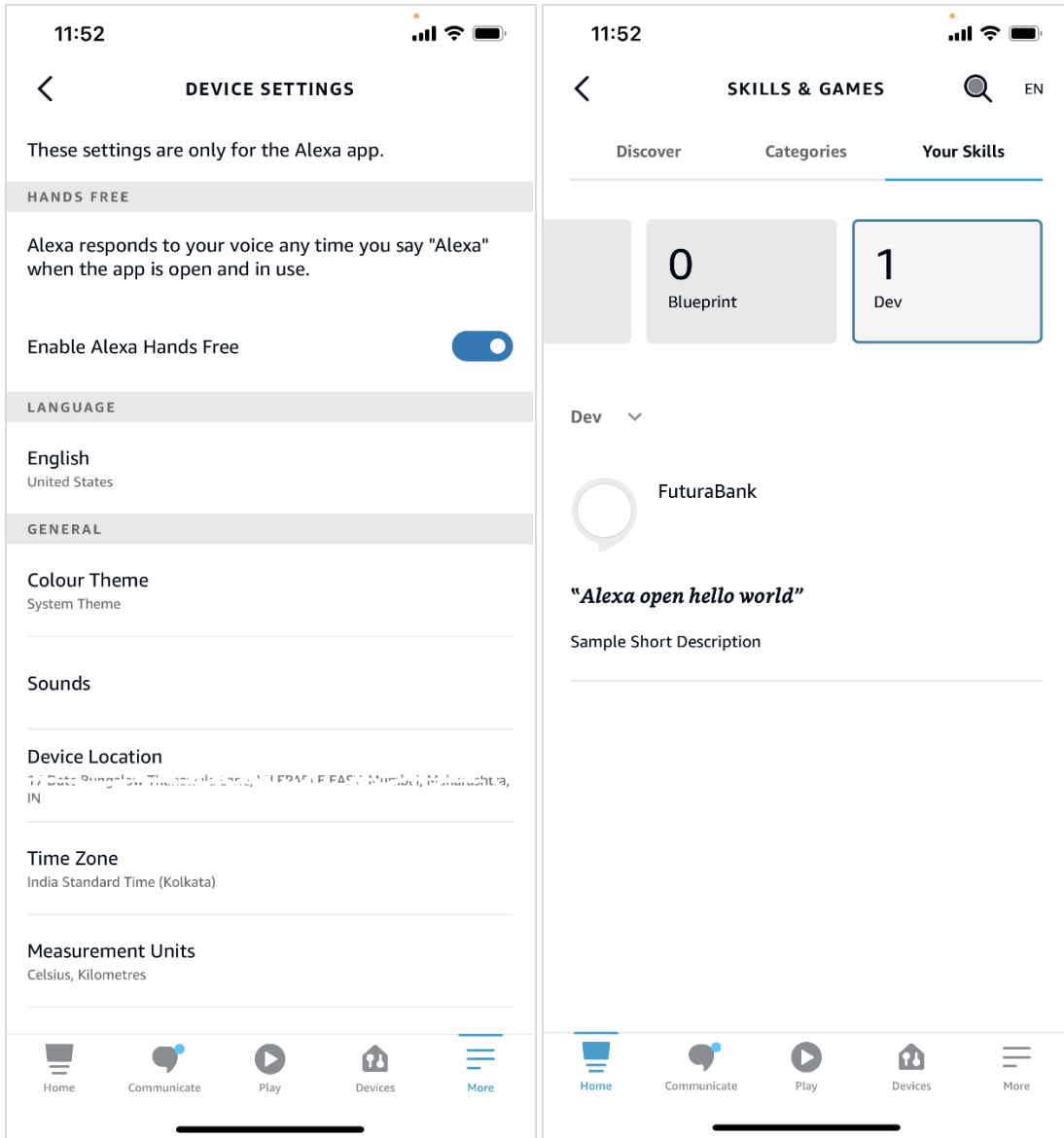
1. In the Bot Builder, create a webhook channel for your bot. In the Create Channel dialog, enter the outgoing Webhook URL as **https://bots-samples-nodejs:8889/ext/apps/alexa-singleBot/singleBotWebhook/messages**. This URL is where your bot will send its responses back to the Alexa Futura Bot skill.

The screenshot shows the 'Channels' page in the Alexa Developer Console. On the left, there's a sidebar with 'Channels (1)' and a list containing 'OBDXAlexa'. The main area shows the configuration for 'OBDXAlexa', which is 'Channel Enabled'. Fields include 'Route To' (set to 'OBDX201'), 'Name' (set to 'OBDXAlexa'), 'Description' (empty), 'Channel Type' (set to 'Webhook'), 'Payload Version' (set to 'Conversation Model'), 'Outgoing Webhook URL' (set to 'https://vuh00ebe.in.oracle.com:13000/singleBotWebhook/messages'), and 'Secret Key' (set to 'PcmkiEjmeJfNZJ8oocMV1QykhOo9BLvt'). A 'Reset Sessions' button is in the top right. At the bottom, the 'Webhook URL' is shown as 'https://idcs-oda-d501204fbc4d496dac7b74d15a590dce-t0.data.digitalassistant.ocic-test.com/connectors/v2/listeners/webhook/channels/65223783-8657-4287-90be-3e34010b005e'.

- 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

The screenshot shows the 'Service Endpoint Type' configuration page. It asks to 'Select how you will host your skill's service endpoint'. The 'HTTPS' option is selected. The 'Default Region (Required)' is set to 'us-east-1'. Below, there are sections for 'North America (Optional)', 'Europe and India (Optional)', and 'Far East (Optional)', each with fields for 'Enter URL...' and 'Select SSL certificate type'. The bottom of the page shows a 'Building Model' status bar.

- In the Alexa Mobile App
 - Ensure that the skill is visible
 - Change the language to English US



3. Link your amazon account for your skill through alexa app.

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' management interface in the Oracle Developer Assistant (ODA) console. On the left, a list of channels includes 'OBDX_Whatsapp'. The main area displays the configuration for this channel. Key settings include: Channel Name 'OBDX_Whatsapp', Channel Type 'Webhook', Outgoing Webhook URL 'https://oda-adui.onrender.com/bot/message', and a Secret Key. A Webhook URL is also provided at the bottom. The channel is currently 'On'.

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 'Configuration' page for a WhatsApp Business API application in the Meta for Developers console. It includes sections for: Webhook (with a URL and verify token), Permanent token, Phone numbers (showing 0 production and 1 test number), and Test account. The 'Webhook' section is currently expanded.