

B2C Service

Deploying B2C Service

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Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications

To find guides for Oracle Applications, go to the [Oracle Help Center Documentation](#).

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1 Deploying B2C Service

Overview of Deploying B2C Service

The Oracle B2C Service Smart Client is deployed on your staff workstations to provide access to B2C Service.

B2C Service uses Microsoft's Click-Once industry standard technology for deployment of the client application to staff workstations. This provides the following benefits:

- New versions of B2C Service can be downloaded without redeploying the client.
- Service packs are applied automatically.
- Workstation administrative permissions are not required for staff members.
- Deployment requires little to no involvement from your technical staff.

Note: If you are deploying B2C Service in a Citrix environment, contact customer support to discuss your deployment needs by sending email to installer@mailca.custhelp.com.

Smart Client Directory Structure

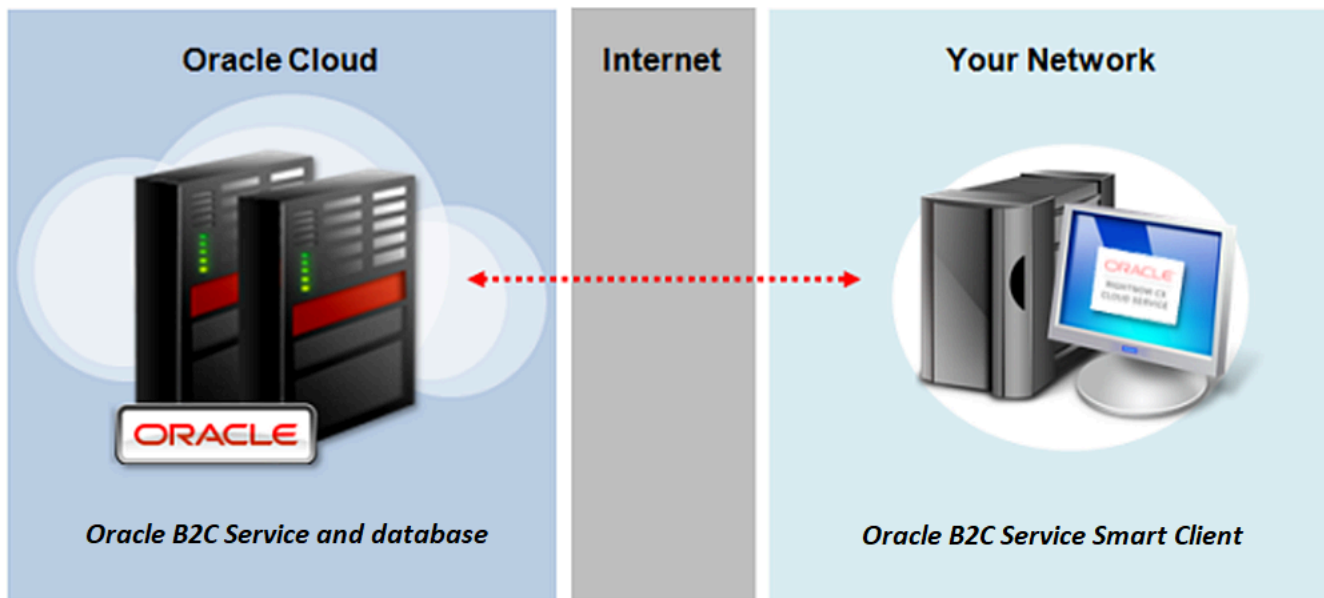
Becoming familiar with the application file structure can be helpful when considering custom deployment options or troubleshooting problems.

This overview describes the smart client directory structure and provides brief definitions of the major files and directories.

When B2C Service is fully deployed to a workstation, the Click-Once deployment tool creates the following directories and files in the **%USERPROFILE%/AppData/Local/Apps/2.0** directory.

- **Alphanumeric_string**—Contains client executables, cached libraries, and manifest files.
- **Data**—Contains user-specific settings and cache files.

In addition, a set of application resources is downloaded to the Windows user profile of each staff member. By default, these are placed in the **%APPDATA%/RightNow_Technologies/<your_site>/<version>** directory.



These resources fall into the following three categories.

- Application files—The binary (.dll) and client files that comprise the extracted application. Upon deployment, these files are downloaded to the **your_site/version** directory and two subdirectories: **AddInPipeline**, which contains add-in libraries, and **RN_COM**, which contains the Redemption library used for Outlook integration.
- User files—The user-specific files written and used by the application, including user settings, downloaded file attachments, cache files, message base strings, and any add-ins to which the staff member has access. The user files are placed in the **your_site/version/Users** subdirectory.
- Updates directory—Each time B2C Service starts, it checks Oracle cloud servers to see if there are new versions of the application files available, such as those provided by a service pack release. When an update is found, it is automatically downloaded to the **your_site/version/Updates** subdirectory as a zip file. The updated files are then extracted and moved to the application files location. The zip file and directory are removed following the update.

Note: For custom deployment options, see [How You Deploy B2C Service to Multiple Staff Members](#).

All deployment files and processes are logged in a time-stamped file called **yyyy.MM.dd.HH:mm:ssfff.log.txt**, found in the **your_site/logs** directory. The log for the current session can also be accessed by clicking View Log File on the Login window. Log files are saved for seven days following deployment and are then automatically deleted to conserve disk space.

Click-Once Deployment

When you deploy the smart client, all necessary components and files are automatically downloaded to your workstation.

After this is complete, your staff can immediately log in and begin configuring and customizing your application. To access the same site in the future, you can launch the client by selecting **Start menu > All Programs > RightNow > RightNow your_site**. Before deploying the client application, be sure to review the system requirements and the environmental configuration information on our support site (*Answer ID 31*). The client application is site-based, meaning that a separate client must be deployed for each site you access. However, a single client application can be used to access all interfaces on a single site. Interfaces are added to the client in the same way the client is deployed.

If you are performing a large-scale deployment of B2C Service, see *How You Deploy B2C Service to Multiple Staff Members*.

Related Topics

- [How the Application Deployment is Processed](#)

Download the B2C Service Client and Log In

Follow this procedure to download the B2C Service client and log in.

Before you start

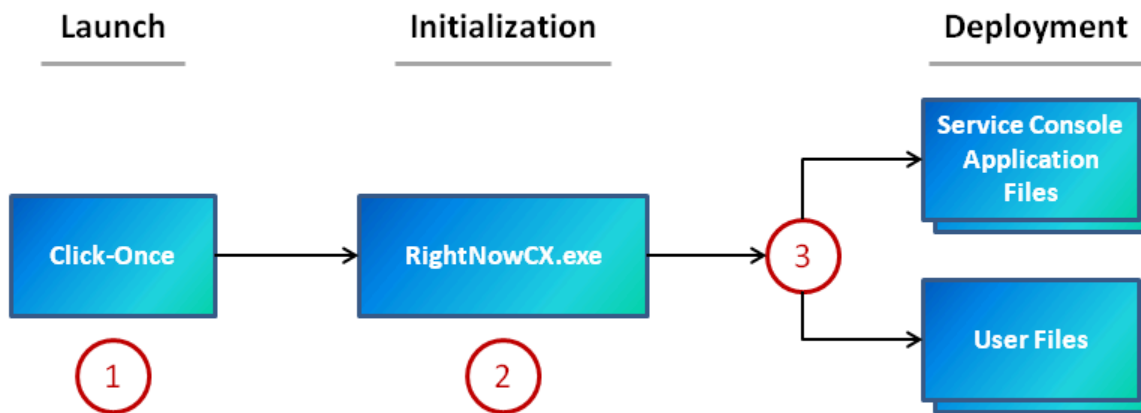
Cookies must be enabled on your workstation in order to work in the application.

Here's what to do

1. Open your web browser and enter the following URL: **http://your_site.custhelp.com/cgi-bin/your_interface.cfg/php/admin/launch.php**
2. Click **Install Oracle Service Cloud**.
A security message warns you that the application should not be installed unless you know that it is from a trusted source.
3. Click **Install**.
After B2C Service downloads to your workstation, the Login window opens.
4. Enter **administrator** in the **Username** field.
You must enter this user name the first time.
5. Enter the password assigned when your site was created.
User names and passwords are case sensitive. Keep this in mind as you add staff accounts.
The Interface field displays the name of the interface from which you launched the installer. This drop-down list will also contain the names of any additional interfaces you install for this site, beginning with the first interface installed.
After logging in the first time, you must change your password.
6. Click **Login**.
 - The Service Console opens after the system updates and loads all necessary support files.
 - The deployment tool adds the interface to the Interface drop-down list on the client's Login window.

How the Application Deployment is Processed

The B2C Service deployment process includes launch and initialization steps described here.



1. Click-Once downloads the B2C Service application, verifies that its deployment files are current (updating them if necessary), and launches the application.
2. The application prompts you to log in and verifies the credentials that you enter.
3. The application deploys the appropriate version application and user files and initializes the smart client. You are now logged in to B2C Service.

After B2C Service deploys to your workstation, you can access it in the future by selecting **Start menu > All Programs > RightNow > RightNow your_site**.

Each time you start the application, the Click-Once function verifies that B2C Service is current, downloading new files and libraries as needed to keep your deployment up to date with each release. For this reason, there is no need to uninstall and reinstall the application following an update. When logging in after an update, B2C Service streamlines the deployment by removing from the workstation any application files (such as program binaries) for versions previously run for the same site. However, user settings and cache files are retained to ensure a smooth transition and consistent experience for staff members.

The deployment process can be customized to ease the load on network bandwidth and disk space during large-scale deployments, operations, and updates of B2C Service. For custom deployment options, see [How You Deploy B2C Service to Multiple Staff Members](#).

Maintenance Packs

Oracle issues maintenance packs to enhance the product release cycle of B2C Service.

Maintenance packs are delivered on a regular schedule following the general availability of each major quarterly release. Oracle's automated maintenance pack deployment process provides a simplified change management methodology, promptly delivering code and performance improvements without the need to perform a full update. Maintenance

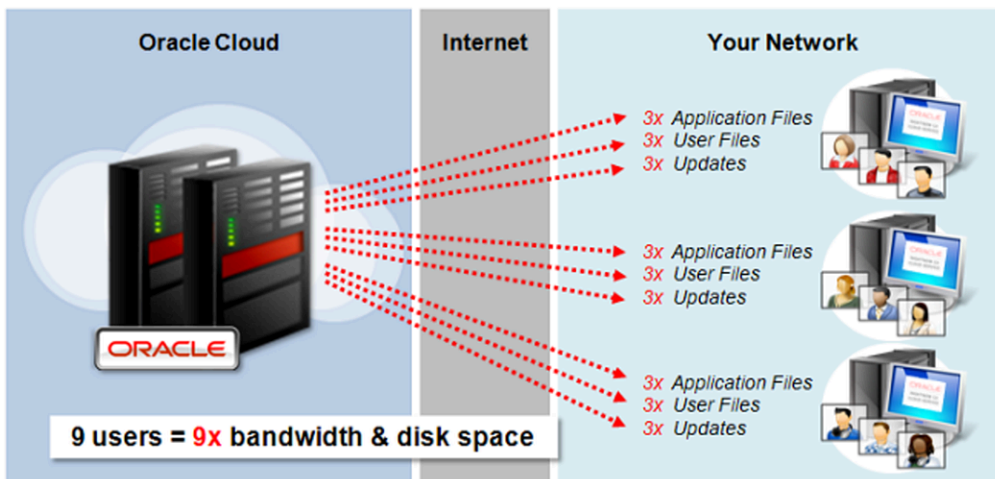
packs are deployed using a background process that requires no involvement from your technical support team, minimizes impact on your network bandwidth, and is seamless to customers and staff members.

For more about maintenance packs, see [Answer ID 9013](#) on our support site.

How You Deploy B2C Service to Multiple Staff Members

When deploying B2C Service to a large team, it is important to consider the impact of the deployment process on your network resources.

When each staff member initially logs in to the application, client files and libraries that support the application's activity are downloaded to the workstation. Depending on the number of staff members and workstations, these individual downloads can consume significant bandwidth and disk space.



To reduce the impact of deployments and software updates on your resources, the application provides three custom deployment options. These settings allow for great flexibility and efficiency of scale when deploying B2C Service to large numbers of workstations. All three options can be used together to dramatically lower the use of the local hard drive on agent workstations.

Note: A few basic distribution items such as lock, logging, and settings files will always be written to the Windows profile directory. This occurs before agent login and therefore cannot be redirected to a custom location through configuration of the application. If you want to prevent any client files from being written to the workstation hard drive, you must implement Windows redirected profiles.

To greatly reduce the resources required to complete a large-scale deployment, we recommend the following process.

1. Log in to B2C Service and define one or more custom deployment options, based on resource availability.
2. Using the Click-Once deployment tool, deploy the application to one workstation. This will download the deployment files to the custom locations you have defined.

3. Complete the deployment by instructing all staff members to log in. The deployment process on each workstation will access the files from the custom locations, resulting in a much smaller resource impact than using the standard deployment procedure.

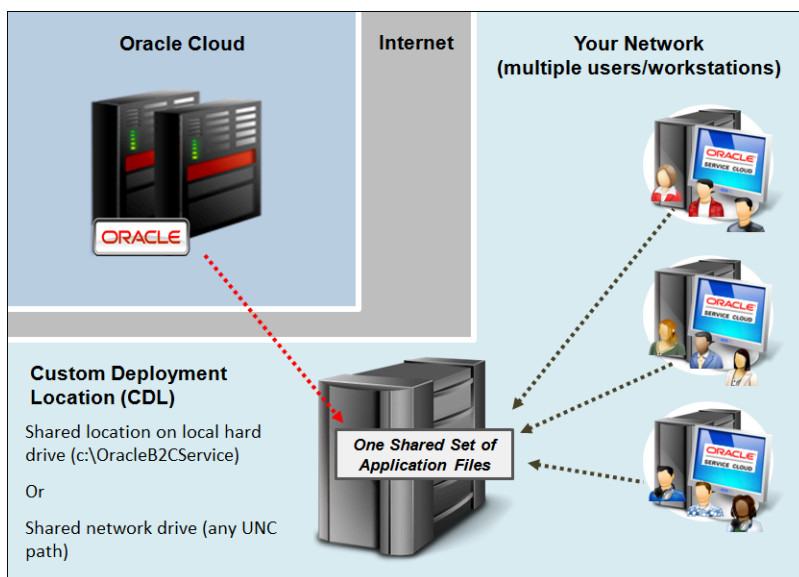
Related Topics

- [How You Share Application Files](#)
- [How You Store User Files on a Network Drive](#)
- [How You Share Update Files](#)
- [Click-Once Deployment](#)
- [Smart Client Directory Structure](#)

How You Share Application Files

To save disk space and avoid unnecessary redundancies, you can define a custom deployment location (CDL) to serve a single set of application files to multiple staff members.

When multiple staff share a single workstation, a full set of application files is placed in the Windows user profile of each staff member. These application files are identical for all staff members. They do not include personal settings. This location can be a directory on the workstation itself, or any path in universal naming convention (UNC) format. When this option is enabled, the full set of application files is downloaded only once from the Oracle servers to the location you define. This set of files can then be shared from the custom location by multiple staff members. For greater efficiency, you can store this set of files on a network drive, where it can be shared by staff members across multiple workstations.



You can define a CDL for your entire site, for specific profiles, or both. If both are defined, the location defined in the profile will override the location defined for the site for all staff members who share that profile.

Related Topics

- [Define a Custom Deployment Location for a Profile](#)
- [Define a Custom Deployment Location for a Site](#)

Define a Custom Deployment Location for a Site

You can set the location where B2C Service is deployed for any site.

If your site contains multiple interfaces, this setting must be consistent for all interfaces.

1. Log in to B2C Service on an administrator's workstation.
2. Click **Configuration** on the navigation pane.
3. Expand **Site Configuration**, and then double-click **Configuration Settings**.
The Search window opens.
4. Search for the CUSTOM_DEPLOYMENT_LOCATION configuration setting.
5. Set the value to the desired location.

Define a Custom Deployment Location for a Profile

You can deploy B2C Service to a defined directory location for individual profiles.

Before you start

Staff members associated with the profile must have permission to create the directory you define (if it does not yet exist) as well as the ability to write and execute files in that directory. If a staff member does not have these permissions, the deployment tool will cease deployment of the files and prompt the staff member to contact an administrator to resolve the problem.

Here's what to do

1. Log in to B2C Service on an administrator's workstation.
2. Click **Configuration** on the navigation pane.
3. Expand **Staff Management** and double-click **Profiles**.
The report opens on the content pane, listing the profiles created for your site.
4. Double-click a profile to edit it.
5. Click the **Deployment** tab to display custom deployment settings.
6. Click **Custom Deployment Location**.
7. Click **Browse** to the right of the field.
The Browse for Folder window opens.

Tip: As an alternative to browsing for a location, you can click the text field and enter the path you want. This setting supports any UNC path or local directory name, such as **C:/OracleB2CService**.

8. Select a location for the custom deployment directory that is outside of the profile directory, or click **Make New Folder** to create a folder.

9. Click **OK**.
10. Click **Save**.

How You Store User Files on a Network Drive

When deploying to multiple staff members and workstations, you can define a custom user files location (UFL) for storing private user files that are used to run the Service Console.

By default, these files are stored within each staff member's Windows profile. With this option, you can redirect them to a network drive.

CAUTION: When specifying a shared network location for user files, make sure the location you define has adequate resources to serve these files efficiently to all of your staff members. Because these files support user processes in the application, they must be served efficiently in order to avoid system latency.

This option is also useful if your staff members roam among different workstations. When a UFL is defined, each staff member will access a single set of user files regardless of what workstation is used. You can define a UFL for your entire site, for specific profiles, or both. If both are defined, the location defined in the profile will override the location defined for the site for all staff members who share that profile.

Related Topics

- [Define a User Files Location for a Site](#)
- [Define a User Files Location for a Profile](#)

Define the User Files Location for a Site

You can set the location where B2C Service files are stored for any user.

If your site contains multiple interfaces, this setting must be consistent for all interfaces.

1. Log in to B2C Service on an administrator's workstation.
2. Click **Configuration** on the navigation pane.
3. Expand **Site Configuration**, and then double-click **Configuration Settings**.
The Search window opens.
4. Search for the `USER_FILES_LOCATION` configuration setting.
5. Set the value to the desired location.

Define a User Files Location for a Profile

Follow this procedure to define a user files location for a profile.

1. Log in to B2C Service on an administrator's workstation.
2. Click **Configuration** on the navigation pane.
3. Expand **Staff Management** and double-click **Profiles**.
The report opens on the content pane, listing the profiles created for your site.
4. Double-click a profile to edit it.
5. Click the **Deployment** tab to display custom deployment settings.
6. Click **User Files Location**.
7. Click **Browse** next to the field.
The Browse for Folder window opens.

Tip: As an alternative to browsing for a location, you can click the text field and enter the path you want. This setting supports any UNC path.

8. Select a location for the user files directory, generally somewhere inside the staff member's profile directory, or click the **Make New Folder** button to create a folder.

Note: Staff members associated with the profile must have permission to create the directory you define (if it does not yet exist) as well as the ability to write and execute files in that directory. If a staff member does not have these permissions, the deployment tool will cease deployment of the files and prompt the staff member to contact an administrator to resolve the problem.

9. Click **OK**.
10. Click **Save**.

How You Share Update Files

To reduce the bandwidth and disk space required for application updates, you can define a shared network location (SNL) for storing and applying updates.

This option can greatly reduce the impact of updating multiple workstations by locally mirroring the update content from the Oracle host servers. The first client to detect an available update will download the **.zip** file to the location you define and extract the contents to its application files location. The **.zip** file is then retained so it can be extracted by the remaining clients upon subsequent logins.

Note: By default, updates are automatically downloaded to the Updates subdirectory of the application files location. For this reason, if a custom deployment location (CDL) has been specified, update files will already be shared from that location's Updates subdirectory just as they would be if the same location were defined in this setting. However, you can still use this setting to define a different location to store updates if you prefer to do so. For example, if the CDL you have defined is on the workstation hard drive, you can still reduce resource impact by downloading updates to a shared network location.

You can also specify the protocol used to perform the updates, and enable the Oracle servers as a fallback resource should the location you define become unavailable, such as during server maintenance. You can define an SNL for your entire site, for specific profiles, or both. If both are defined, the location defined in the profile will override the location defined for the site for all staff members who share that profile.

Related Topics

- [How You Share Application Files](#)
- [Define a Shared Update Files Location for a Site](#)
- [Define a User Files Location for a Profile](#)

Define a Shared Update Files Location for a Site

Follow this procedure to define a shared update files location for a site.

1. Set the SHARED_NETWORK_LOCATION configuration setting to the location you want. See the online documentation for your B2C Service version ([Answer ID 5168](#)).
2. To enable the Oracle servers as a fallback resource should the location you define become unavailable, set the RNT_SERVER_FALLBACK configuration setting to **Yes**.

Note: If your site contains multiple interfaces, these settings must be consistent for all interfaces.

Define a Shared Update Files Location for a Profile

Follow this procedure to define a shared update files location for a profile.

1. Log in to B2C Service on an administrator's workstation.
2. Click **Configuration** on the navigation pane.
3. Expand **Staff Management** and double-click **Profiles**.
The report opens on the content pane, listing the profiles created for your site.
4. Double-click a profile to edit it.
5. Click the **Deployment** tab to display custom deployment settings.
6. Click **Shared Network Location**.
7. Click **Browse** next to the field.
The Browse for Folder window opens.

Tip: As an alternative to browsing for a location, you can click the text field and enter the path you want. This setting supports any UNC path.

8. Select a shared directory on the network or click **Make New Folder** to create a folder.

Note: Staff members associated with the profile must have permission to create the directory you define (if it does not yet exist) as well as the ability to write and execute files in that directory. If a staff member does not have these permissions, the deployment tool will cease deployment of the files and prompt the staff member to contact an administrator to resolve the problem.

9. Click **OK**.
10. To obtain update files from the Oracle servers as a fallback in the event the network location is inaccessible, select **Oracle Service Cloud Server Fallback**.

11. Click **Save**.

Glossary

absolute time

An exact date and time defined in an escalation action for business rules or a comparison period for custom reports. In standard reports, absolute time is the amount of time passed based on a 24-hour clock. See also *relative time*.

access level conditional section

A method of controlling the visibility of a portion of an answer. Only those customers with permission to view the access level assigned to the answer section can view it.

accessibility

The characteristics of a website that allow all users, regardless of disability, to have complete access to the information and features of the site.

account self-service

A feature for staff members to get help when logging in to the administration interface. If staff members forget their login information, they can request their user name or password by clicking Login Help on the Login window. Account self-service can also be set up to open the login procedure in online help or to convey an alternate message.

action

The part of a business rule that defines what happens when an object (answer, contact, incident, chat session, opportunity, organization, target, or task) meets the rule's conditions. Actions are also a part of script and workspace rules, and a component of campaigns that can perform one of several functions.

action arrow

An arrow on a workspace field or control that displays available editing options.

activate

A process that is manually run after making changes to a state, function, or rule in a *rule base* to check for errors, archive the current rule base, and convert the edited rule base to the active rule base. See *business rules*.

Active

One of the default opportunity statuses and status types. An opportunity with the Active status is currently advancing in the system toward a sale.

add-in

A custom .NET component that is loaded and activated by B2C Service to add new features and integration capabilities.

Add-In Manager

A utility for adding, updating, and deleting add-ins in B2C Service. The Add-In Manager is also used to set *add-in* permissions for each interface.

administration interface

The graphical user interface that staff members use to configure and manage B2C Service. See also *agent desktop* and *Service Console*.

administrator

A staff member who configures, customizes, and maintains an B2C Service application.

administrator login

The default login used by the administrator to download B2C Service and log in the first time. This special login is not a defined staff account and has no navigation set or profile associated with it. Using this login, the administrator must create a navigation set, profile, and staff account in order to access all functionality. See *navigation set*, *profile*, and *staff account*.

administration site

See *Customer Portal Administration site*.

advanced mode

A survey editing mode for creating detailed questionnaires using an extended feature set that includes survey branching and automation elements.

Agedatabase

A scheduled utility that operates on the knowledge base data to maintain dynamic answers and make searching more efficient for staff members and customers.

agent

A staff member who may be assigned incidents and chats with customers, and who may also maintain contact and organization records.

agent desktop

The graphical user interface that staff members use when working with records, mailings, surveys, campaigns, and standard and custom reports. Agent desktop also refers to a set of complementary features in B2C Service, including workspaces, workspace rules, guides, agent scripts, script rules, workflows, and add-ins, each representing a different, powerful way of interacting with records in the knowledge base. While each component serves a distinct purpose, they can be used together to create a highly adaptive work environment. See also *administration interface* and *Service Console*.

agent scripting

A feature that helps guide staff members as they enter information into records on *workspaces*. See also *script*.

aging

An automatic process that reduces an answer's solved count as the frequency with which the answer is viewed by customers declines. As the solved count is lowered, the answer will move down the list of answers and be less visible to customers.

alias

A word that represents another word or phrase. Aliases and the words or phrases they represent can be added to the synonym list to enhance customer searching. See *wordlist file*.

anchor

A node on an action or decision in a campaign used to create a path. Actions and decisions have anchors for incoming and outgoing paths. Anchor also refers to a destination for hyperlinks placed at locations within documents for use in mailings and questionnaires for surveys and in answers when linking to other answers.

answer

Any knowledge base information that provides solutions to common customer support questions.

answer access level

A method of controlling what information is visible to customers. The default answer access levels are Help and Everyone, and custom access levels can be added.

answer custom field

A field for gathering and displaying additional information about answers. Answer custom fields appear when adding or editing an answer and on the Answers and answer details pages.

answer relationship

The relationship between two or more related answers. Answer relationship types include sibling, manually related, and learned link. Sibling and manually related answer relationships are defined by staff members. Learned link answers are automatically defined through customer activity. See *learned link*, *manually related answer*, and *sibling answer*.

answer status

A method of controlling the visibility of an answer. The default answer statuses are Public, Private, Proposed, and Review, and custom answer statuses can be added.

answer status type

The status of an answer that determines whether it can be viewed by customers. The default answer status types are Public and Private.

answer type

The format in which answers display to customers. Answer types include HTML, URL, and file attachment. See *File attachment answer*, *HTML answer*, and *URL answer*.

answer update notification

A way for customers to sign up to be notified whenever a particular answer is updated. Customers can also sign up for notification whenever any answer associated with a specific product or category is updated.

Answers page

A page on the customer portal where customers can view answers and search the knowledge base. Customers can view individual answers or search the knowledge base using selection criteria to narrow their search. If additional elements are enabled, customers can also search documents, websites, and communities. See also *Web Indexer* and *Social Experience communities*.

API (application program interface)

An interface that enables programmers to communicate with the Oracle database. The API includes functionality to create, update, delete, and retrieve answers, contacts, hierarchical menus, incidents, opportunities, organizations, quotes, SLA instances, staff accounts, and tasks.

application menu

An interface element containing a list of options for working in B2C Service, including access to other areas of the product and shortcuts for adding records and items to the knowledge base. The application menu also contains options for changing personal settings and password and customizing the content pane and navigation pane display. Staff members can also exit their application from this menu. See *file menu*.

Ask a Question

A page on the customer portal where customers can submit a question when they cannot find an answer in the knowledge base.

asset

Any product or service associated with an organization's customers. Assets can require serial numbers or not and can be registered by customers on the customer portal or by agents on the agent desktop.

asset product

Any product or service sold or provided by an organization that can be tracked in B2C Service. Asset products are configured using the product catalog.

asset record

Information about a specific product or service provided to a specific customer that is tracked and maintained in B2C Service.

audience

All of the contacts belonging to the lists and segments associated with a mailing or survey. See also *contact list* and *segment*.

audience sampling mode

A market testing option for transactional mailings and surveys that sends a sample of test messages to portions of your audience. If more than one message is created, market testing rotates through the test messages. See *market testing*.

audit log

A list of all the actions performed on a report, record, or item in the knowledge base, including who performed the action, what the action was, and the date and time of the action.

auto filter

A control added to report columns for filtering report data by values in the columns.

automatic logout

A way of managing desktop user sessions by automatically logging out inactive sessions after a specified time of inactivity. Automatic logout is part of *desktop usage administration*, which assists organizations in lowering seat usage for licensing compliance. See also *force logout*.

backup directory

The directory that contains all the backup files created by the File Manager.

backup file

A file that is automatically saved each time a file is edited through the File Manager. Before the file is overwritten, the backup file is saved. The restore function can be used to revert to the backup file.

basic page set

The template and set of customer portal pages that have been optimized for display on browsers with limited or no JavaScript capabilities.

billable task

A way of classifying and recording the amount of time agents spend working on incidents. The default billable task is Miscellaneous, and custom billable tasks can be added.

block

A section of widget code that can be customized to *extend* the view of a standard widget. Widget code that is not within a block cannot be modified.

block quotes

A symbol or HTML tag that designates a section of text that is not part of the most current email reply, such as previous entries in the email conversation. See also *checksum* and *techmail*.

boolean searching

A knowledge base search that allows customers to connect multiple keywords using & (AND) and |(OR) operators.

bounced email

Email that is undeliverable. Emails can be bounced when email accounts are not functioning properly or are full at the time the mailing is sent. Outreach and Feedback tracks bounced emails. See also *email management*.

broadcast mailing

A mailing sent to one or more *contact lists* or *segments*. Broadcast mailings can be sent at a scheduled time and can also be used in *campaigns*.

broadcast survey

A survey sent as a broadcast mailing in which the message, audience, and mailing options are defined in the survey.

builder

A community member whose primary role is to create hives and groups for a community. Access to builder functions is provided by the Builder–Custom and Builder–Template user types. See *user type*.

Bulkdel

A utility for deleting several incidents at once.

business objects

The page of the Customer Portal Administration site that defines the set of answer, contact, and incident fields that can be used to define input and output fields on the customer portal.

business rules

A component for defining processes to automate workflow, notification, and escalation. Business rules can automatically route incidents, opportunities, and chat sessions; send email and Outreach messages; escalate answers, incidents, opportunities, and tasks; update records; and assign SLAs. See also *script rules*, *target rules*, and *workspace rules*.

cached data

Report data that has been temporarily stored in the database for quicker report generation. This data is cached nightly by the *Agedatabase* utility and can be purged regularly. Cached data also refers to local cache files stored on a staff member's workstation. This includes all option lists data (any data accessed from a drop-down list or menu list such as customizable menu items) plus additional data such as report and workspace definitions, questions, documents, and standard text.

Campaign

A multiple-step marketing process based on business logic. Campaigns can contain any number of actions and decisions and move contacts through a series of steps when specified criteria have been met.

Canceled

A mailing and survey status that indicates a mailing or survey has been manually canceled before being completed.

case section

A logical group of *conditional sections* where one, and only one, conditional section displays to the customer. As soon as the first conditional section is matched, the content for that conditional section is added, and no other conditional sections within the case section are evaluated. Case sections make content more relevant and targeted to a specific audience than independent conditional statements. See also *condition*.

Case statement

A type of conditional element used for multiple-choice decisions that allows more diverse branching capabilities to be added to campaigns and surveys based on conditions defined in the workflow. Case statements are unique because they have an outgoing path for every condition. As soon as the first choice (condition) is matched, the path for that choice is followed, and no other conditions within the case statement are evaluated.

category

An option for grouping answers and incidents that allows more precise organization in the knowledge base. Staff members can classify answers and incidents by category and up to five additional levels of sub-categories, allowing more refined searching by customers and staff members. See also *product*.

category page

A *custom page* that serves as a landing page for grouping and accessing custom *content pages* in a *community*.

certificate

A digital piece of information for email and Internet security that includes the name of the certification authority, the holder of the certificate, the certificate holder's public key, the dates the certificate is valid, the serial number, and the digital signature of the certification authority. Certificates are also called *public* and *public key certificates*.

certificate revocation list

A list of certificates that have been suspended or revoked before they have expired. The certification authority maintains, updates, and publishes the certificate revocation list at regular intervals.

certification authority

A third party authorized to issue certificates and authenticate the identity of the holder of the certificate.

channel

The source of an incoming incident or outgoing response. Channels are grouped as standard email channels (Service Email, Outreach Email, Phone, Fax, Post, Service Web, Outreach Web, Chat, and Email) and social channels (Community, Twitter, YouTube, RSS feeds, and Facebook). Channels are also used to indicate contact, opportunity, and organization notes.

channel account

A shared credential that permits one or more designated staff accounts to pass through a social media site when login and password authentication is required. Channel accounts can be created for communities, Facebook, and Twitter.

channel type

The social channels tracked in contact records when storing social account user names. Channel types include Facebook, Twitter, and YouTube.

chart style

A collection of display settings that can quickly be applied to charts used in reports. Chart styles control most of the graphical configuration of charts.

chat agent status

A method of tracking an agent's availability to chat. The default chat agent statuses are Unrestricted, Unqualified, Unspecified, In Meeting, and On Break, and custom statuses can be added.

chat agent status type

The status of an agent's availability to chat. Default chat agent status types are Available, Unavailable, and Logged Out.

chat session

A real-time, two-way dialog between a customer and one or more chat agents. See *Chat*.

chat session queue

A sequence of unassigned requests for chat sessions. The default chat session queue is Default Chat Queue, and custom queues can be added. Requests are added to chat session queues automatically by business rules.

chat session routing

A process of routing customer requests for a chat to a specific *chat session queue* based on rules in the Chat rule base.

checksum

A calculated value that represents the content of a block of quoted text. This value is sent within the *block quote* tags of the email message and is used to determine if text has been added to the original message. See also *techmail*.

choice question

A question type that allows customers to choose their answer from a menu, option, check box, or list.

Click-Once installer

A utility used to install the *Smart Client* on staff members' workstations.

client

The interface that displays on a customer's computer when submitting a request to chat with an agent.

clone

To create an exact copy of an existing site or interface.

Closed

One of the default opportunity statuses and status types. An opportunity with the Closed status has resulted in a sale.

clustering

An automatic process that groups the knowledge base into clusters of related answers and labels each cluster group with keywords that define those answers. See also *data mining* and *topic browsing*.

co-browse

A feature in *Chat* that enables agents to guide customers through web pages using their mouse or other pointing device to demonstrate actions. Co-browsing may also be available on incident workspaces to let customers share their desktop with agents when they are on the phone.

Code Assistant

A Customer Portal tool to aid migration of custom code from earlier framework versions to a newer version. The tool offers code suggestions for migrating widgets, converting to a new UI version, and removing features that are no longer supported.

color scheme

A collection of colors that can be applied to chart styles. Multiple colors can be defined and combined into one color scheme. Charts that use the same scheme use the same set of colors.

comment

A form of content created by members when responding to *posts* in a community.

community

A social web solution consisting of customizable *hives*, members, groups, and *custom pages*.

community privacy level

The level of privacy that determines whether a login is required to access community content.

comparison period

A reporting parameter used to compare a report's time period to an identical length of time in the past. Comparison periods are defined when creating or editing a custom report and can be included in standard reports.

compatibility set

A set of Customer Portal widgets designed to be used together. Best practice recommends using widgets from the same compatibility set on any given customer portal page rather than combining them from different compatibility sets.

competitor

An option for identifying other parties pursuing the same opportunity.

compile

A process that runs the compiler engine to check states, functions, and rules within a *rule base* to ensure there are no errors. See *activate*.

Completed

A mailing and survey status that indicates a broadcast mailing or broadcast survey has been sent. The system automatically sets the status to Completed from the Sending status.

complex expression

A search technique that enables customers and staff to search for a broader set of content. This technique allows wildcard searching using an asterisk (*) at the end of a word or partial word and a tilde (~) before a word to perform a similar phrases search on that word only. *Word stemming* and *logical operators* are also supported. This technique is available on the administration interface and the customer portal.

computed field

A column whose value is derived from calculations performed on database fields. Computed fields can be added to output levels in custom reports.

condition

The part of a business rule that determines whether an answer, contact, incident, chat session, opportunity, organization, target, or task matches a business rule. Rules can contain multiple conditions. Conditions are also a part of script and workspace rules.

conditional formatting

A method of highlighting specific information in report columns that does not require creating data exceptions.

conditional section

A section of text in a *document* that appears only to those contacts meeting certain criteria. Conditional sections can also be placed in answers and tagged with specific answer access levels. In message templates, conditional sections can be used to filter content by contact, profile, runtime variable, or record type. See also *access level conditional section*.

conference

A feature in Chat that enables an agent to conference another agent into a chat session with a customer.

configuration button

The button in a staff member's navigation set containing a list of all the configuration items necessary to configure and customize an organization's application. Items can be added to or removed from this button from the Navigation Sets editor or, with the Customize Navigation Sets profile permission, the Customize List window. See also *configuration list*.

Configuration Settings editor

The interface element used to customize the functionality and features of the administration interface and the customer portal.

configuration list

All of the configuration items associated with the *configuration button* in a staff member's *navigation set*. The configuration list is organized in a tree on the navigation pane.

configuration settings

All of the settings accessed from the Configuration Settings editor to configure and customize the administration interface and the customer portal in B2C Service.

Configuration Wizard

An interactive utility for configuring web indexing on the customer portal. Web indexing allows customers to search the knowledge base along with web pages and other web-accessible documents within a specified domain. See *Web Indexer*.

Connect Object Explorer

A ROQL query interface that helps Customer Portal developers become familiar with the Connect for PHP API and explore Connect objects and metadata.

contact

Any individual with a contact record in the knowledge base. Contact records can be added by staff members on the Service Console and by customers on the customer portal. Contact records are also added automatically when a customer without a record submits a question on the Ask a Question page of the customer portal. See also *primary contact*.

contact custom field

A field for gathering and displaying additional information about contacts. Contact custom fields appear when adding or editing a contact record and on the Your Account page of the customer portal.

contact list

A static or fixed group of contacts that is used to choose the contacts who receive a broadcast mailing or survey. Contacts can be added to lists.

contact role

An option for classifying contacts by their roles in opportunities.

contact type

An option for classifying contacts by types, such as job positions or decision-making roles.

Content Library

A component for creating content that can be used in mailings, web pages, and surveys. Content includes documents, tracked links, files, templates, and snippets.

content page

A type of *custom page* to which community content and functions can be added using *panels*. See also *category page*.

content pane

The area on the console where staff members work with items selected from the navigation pane or the application menu.

content pane tabs

An interface element for switching between the items currently open on the Service Console. Content pane tabs display at the top of the content pane by default. Staff members can click a tab to return to a report or item or right-click a tab and select from a number of options.

context-sensitive answers

A subset of *SmartAssistant* that allows organizations to construct special Related Answer links from any web page to provide additional information to their customers. See also *help access level*.

control

A tool for placing titles, spacers, reports, and other advanced features on a workspace.

cross tab

A method of displaying report data in a table format.

CSV (comma-separated value)

A file format with commas separating one column value from the next. Each row is delineated by a hard return. Also called *comma-delimited*.

cultures

A predefined set of attributes, such as decimal symbols and display formats, used to populate fields on the Currencies editor. Cultures are comparable to regions in Microsoft Windows. See also *Currency*.

Currency

A monetary denotation based on country of origin. Currencies can be defined for each country or province in which an organization does business. See also *Exchange rate*.

custom field

A field for gathering and displaying additional information about answers, contacts, incidents, opportunities, organizations, quotes, sales products, staff accounts, and tasks. Custom fields appear when adding and editing records. Depending on the type and visibility, they may also appear on the customer portal.

custom object

Any custom table created or managed from the object designer. Custom objects can be added to B2C Service to integrate organization-specific data with the database. Although custom objects are not native to B2C Service, they can be tied to standard objects and added to workspaces, workflows, custom reports, and navigation sets. See also *object* and *standard object*.

custom page

A category or content page that can be fully customized to extend areas of a community in need of additional resources or exposition. See *category page* and *content page*.

custom report

A report that is created by copying and editing one of the standard reports in B2C Service and saving it as a new report, or by combining data from selected tables in the database to create a new report. Custom reports can include customized output, data computation, and scheduling. See also *standard reports*.

customer

A contact or organization that has a service or purchase history in the knowledge base.

customer account

Information consisting of a user ID and password that allows customers to access certain functions on the customer portal, such as the Account Overview page. Customers can create an account by clicking the Sign Up link or the Your Account tab on the customer portal. Customer accounts are also automatically created when a customer without an account submits a question, which adds a contact record to the knowledge base.

Customer Portal Administration site

The site where administrative tasks, such as selecting the page set, viewing widget definitions and logs, and defining page set mapping, are performed.

dashboard

Any combination of individual reports shown together in one report. Using dashboards, staff members can search for and view a wide range of data from different reports without opening each report individually. The customer portal also includes a dashboard on the Customer Portal Administration site.

data dictionary

A list of all the tables in the Oracle database that can be accessed from the Service Console. Data dictionary also refers to the list of available tables and fields that can be used in custom reports and is accessed from the report designer. Functions, output variables, and computed fields can also be selected from the data dictionary when working with a custom report.

data import template

A saved format used by the Data Import Wizard to map columns in a CSV file to columns in the database. See *Data Import Wizard*.

Data Import Wizard

An interactive utility used for importing records into the database.

data lifecycle management

Provides built-in policies to archive and purge unused or unrequired data automatically and periodically.

data mining

The exploration and analysis of large quantities of data to discover meaningful patterns and rules. Data mining enables organizations to turn raw data into information they can use to gain a marketplace advantage.

data set

The database tables and table joins that determine what data can be returned in a report. Data set also consists of the database columns a segment (dynamic list in Outreach and Feedback) will have access to and what filters will be used to determine the final data set.

data type

A set of data having predefined characteristics such as strings, integers, or dates. Each column in a database table is assigned a data type. Data type also refers to the type of custom field specified when adding answer, contact, incident, opportunity, organization, quote, sales product, staff account, and task custom fields. Data types for custom fields consist of menu, radio, integer, date, date/time, text field, and text area fields.

database

The tables that store information that is retrieved, edited, and added in an B2C Service application. See also *data dictionary*.

Dbaudit

A utility that builds and populates the schema and performs the database portion of the B2C Service update. Dbaudit can also be used to view the database schema.

Dbstatus

A scheduled utility that escalates incidents, answers, tasks, and opportunities based on business rules. Dbstatus also sends emails to those customers who have requested to be notified when a particular answer has been updated. See Answer update notification and Business rules.

Dead

One of the default opportunity statuses and status types. An opportunity with the Dead status is no longer being pursued by a sales representative.

decision

A component of a campaign. Decisions filter contacts by specified criteria and can have Yes and No paths.

decryption

The process of converting encrypted text into readable text using private keys assigned to authorized persons.

default directory

The directory containing original default copies of all the files customizable through the File Manager. During an update, any files that have changed will also be updated in the default directory. Using the restore function, a file can be restored to the original configuration. See *File Manager*.

deliverability

The degree to which an email message aligns with industry-accepted practices to ensure delivery to an intended recipient. Emails with low deliverability are often blocked by ISPs and spam filters.

dependency

A relationship or association between items in the database in which the use of one item impacts the functionality of the other item. When a dependent item is deleted, such as deleting a contact list used in a mailing, all items that use the dependent item become invalid and must be manually updated.

deploy

To stage customer portal pages from the development folder and then promote the staged files into production. See also *stage* and *promote*.

deployment log

The record of actions taken on customer portal files, including staging, promoting, rolling back, and updating through upgrades and service packs.

deprecated

A condition that indicates a feature or widget has been replaced with different functionality or a newer widget.

design space

The section of the workspace designer where fields and controls are added, edited, moved, and removed to create a workspace.

desktop usage administration

Functionality for managing desktop user sessions to help organizations lower seat usage for licensing compliance and reduce costs. The administrator can manage both active and inactive sessions using force logout and automatic logout options. See *automatic logout* and *force logout*.

desktop workflow

A sequence of workspaces, scripts, decisions, and actions presented to staff members as a dynamic interface to support complex business processes.

development area

The set of customer portal files that can be edited and viewed without being available to customers. Designers and developers can work on these files and test their changes until they are satisfied that the files can be made publicly available to their customers, at which point the development files are staged and promoted to the production area. See also *production area*.

display position

The position where a new answer appears on the Answers page. Options include Historical Usefulness; Place at Top, Middle, or Bottom; Fix at Top, Middle, or Bottom. The display position is selected from the answer's Display Position drop-down list.

disposition

An option for classifying and recording how incidents are ultimately resolved. Up to six levels of dispositions are available.

distribution list

A mailing list of non-staff member email addresses used for scheduling reports or any mailing event.

docked filter

A runtime selectable filter or output variable that is added to the top of a report. Docked filters let report users select different runtime filter values and output variables in the report, bypassing the Search window.

document

The material used in a survey or mailing, or served as a web page that can contain text, snippets, conditional sections based on contact filters, merge fields, links, and web forms.

DomainKeys (DK)

A form of email authentication that uses a cryptographic signature to verify that an email message originated from a specific organization. DomainKeys differs from DKIM authentication primarily by the email headers used to generate the signature.

DomainKeys Identified Mail (DKIM)

A form of email authentication that uses a cryptographic signature to verify that an email message originated from a specific organization. DKIM differs from DomainKeys authentication primarily by the email headers used to generate the signature.

dormant incident

An incident that is not returned when performing word- or phrase-based searches. After remaining in the Solved status for a specified time, incidents become dormant to ensure that the knowledge base is populated with the most useful and timely information.

Draft

The preliminary status of a mailing or survey. When a mailing or survey is created, it is set to the Draft status. The status will also return to Draft if the mailing or survey's schedule is canceled.

drill down

To start at a top or general level and become more specific at each lower level. The drill-down feature enables access to additional output levels in reports.

drill-down filter

The fields in an output level used to filter the data returned when drilling down to another output level. This impacts what data is returned in the drill-down level.

drill-down link

The field in an output level that is used as a link to drill down to the next output level.

dynamic form

A form that hides or displays fields based on a customer's response to other fields on the form.

editor

A layout format on the content pane when working with records and configuration items. Editors contain the fields for adding and editing records and items.

Else clause

The clause that follows the Then clause of a business rule. If the conditions of a rule are met, the actions in the Then clause are invoked. If the rule's conditions are not met, the actions in the Else clause are invoked.

email address sharing

Functionality that allows a single email address to be shared by multiple contacts, such as members of a family or team. When enabled, a contact-matching process is used to associate records and transactions initiated by a shared email address.

email answer

A feature that enables customers to email answers they are viewing to a specific email address.

email management

Functionality that sends and receives email messages, processes bounced messages, intelligently routes incoming inquiries based on business rules, and automatically suggests answers to inquiries.

email message

An email that is automatically sent to customers or staff members. The process of sending email messages is triggered by events in B2C Service. For instance, when a customer submits a question, the Question Receipt message will be sent to the customer's email address. Using the Message Templates editor, staff members can customize each message and standardize their design to give them all the same look and feel. See *message templates* and *Global template*.

encryption

The process of translating a text message into unreadable text to ensure security. Encrypted messages may be read only by authorized persons with access to a private key that allows them to convert the message back into readable text.

escalation

A means of tracking answers, incidents, opportunities, and tasks using business rules. When a rule's conditions are met, the rules engine schedules escalation to the new level. When the scheduled time (based on absolute or relative time) arrives, the rules engine sets the escalation level and takes the action specified by the rule, such as sending an email, notifying a manager, or following up with a customer. See *business rules*.

even split mode

A market testing option for broadcast mailings and surveys that sends test messages to equal portions of an audience. See market testing.

event (Named/Exit/Finish)

An action defined in a script rule or workspace rule that can be used to trigger other rules or workflow connectors. Events are defined by adding event fire actions, such as the Fire a Named Event action.

Everyone access level

An access level designed to allow answers to be visible to all customers depending on the answer status.

exception

A method of highlighting report data that meets certain criteria. Data exceptions also allow email alerts to be sent when data in a scheduled report meets the exception criteria.

exchange rate

A scale of monetary conversion from one currency to another. See *Currency*.

explorer

A layout format on the content pane that displays a tree on the left, containing folders and other items, and a detailed list of the selected folder's contents (subfolders and files) on the right. Explorers are available for certain configuration items and components in B2C Service.

expression

A component of fixed and runtime selectable filters that defines a function, database column, value, or any combination of the three.

extend

Using the widget builder to create a new widget by modifying the behavior and attributes of an existing widget.

external event

A program or script that runs as the result of an event occurring in B2C Service, an action specified in a business rule, or an action in a marketing campaign.

external suppression list

An email delivery filter used to exclude an explicit set of email addresses from all mailings and surveys. When a mailing or survey is launched, contacts with email addresses in the list are filtered from the audience by default.

FCRR (first contact resolution rate)

A statistic that reports how often staff members or groups solve incidents with only one response. This number displays as the percentage of incidents solved with only one staff response.

file

A file that is uploaded to Outreach for attaching as a link in a document or snippet. From the Content Library, files can be uploaded and their characteristics can be defined.

file attachment

A file that is attached to an answer, contact, incident, opportunity, organization, or task, or sent with an incident response or quote. Files that are permanently attached to an incident or answer can be viewed by customers who view the record. Files that are sent with an incident response can be opened with the customer's email client and are not permanently attached to the record.

file attachment answer

A type of answer that appears as a file attachment.

file link

A clickable link to a file attachment that is inserted in a snippet or a document.

File Manager

The interface used to modify files for B2C Service products. Administrators can modify files used to customize a site's Chat images, custom scripts, wordlist files, dictionary files, and certificate directories.

File menu

The interface element used to access the application menu. The File menu is found to the left of the Home tab on the ribbon. See also *application menu*.

final message

A mailing format used to send the mailing as final. In broadcast mailings and surveys, final messages are sent to all audience members who have not yet received a test message.

first due

A queuing pull policy that uses the incident due date or longest wait to determine which incidents or chats to retrieve from the queue.

fixed filter

A component of Analytics and Outreach and Feedback segments used to define the data set available in the report or segment. Fixed filters are statements constructed from expressions, functions, and operators, and cannot be altered when using a segment or when running a report. See also *custom report* and *segment*.

flag

A method for defining the priority of a record. A flag displays at the top of records and staff members can add text to the flag and change the flag importance (red=high, blue=medium, green=low, white=no importance).

flow diagram

A graphical representation of a campaign, survey, or desktop workflow. Flow diagrams allow staff members to diagram the events and decisions of a campaign, survey, or business process. When a campaign or survey is launched, contacts are automatically moved through the flow based on the specified criteria. When a desktop workflow is associated with

a record editor in a profile, staff members with that profile will move through the flow when opening a record of the corresponding type. See also *desktop workflow*.

force logout

A way of managing desktop user sessions by manually logging out staff accounts who are currently logged in. Force logout is part of desktop usage administration, which assists organizations in lowering seat usage for licensing compliance. See also *automatic logout* and *desktop usage administration*.

forecast

A projection of revenue for an opportunity that may close in a given sales period.

foreign key

A column or columns that contain values found in a primary key of another table. Foreign keys are used to ensure relational integrity and are rarely primary keys. See also *primary key*.

Forward to Friend link

A link that enables contacts to forward the message to another email address. This type of link can be added to documents, templates, and snippets for use in mailings, surveys, or web pages.

framework

The underlying code structure of the Customer Portal, which offers a standard reference implementation as well as the ability to customize code for particular applications.

function

A mathematical operator that can be applied to data from database fields to modify the data that is returned in an output column. Function also refers to a container for business rules. Functions are used anywhere in a business process that dictates doing the same thing in more than one place. Functions reduce the number of rules needed by allowing the same rules to be evaluated from multiple states. See also *business rules* and *rule state*.

Give Feedback

A link on the sidebar on the Customer Portal template that customers can click to submit feedback about an organization's website, customer service, or product satisfaction.

global header

The global header, found at the top of the Agent Browser User Interface, contains options for working in B2C Service.

Global template

An element of message templates functionality containing the content that frames the message-specific content in each system-generated notification and email message. The global template is used to standardize the design of outgoing messages to give them the same look and feel. See *message templates*.

group

A way to organize staff accounts in B2C Service. In communities, group refers to a collection of members based on a common interest, cause, or organization.

group type

A classification used to organize groups in a community and expand searching of related members and content.

grouping

A method for grouping data in a segment. Filters can be used when grouping and are applied to the data after the grouping is completed.

guest

Any community visitor who is not logged in with a community account.

guide

A collection of branching questions, responses, answers, and text explanations used in guided assistance. See *guided assistance*.

guided assistance

A component that helps agents quickly find answers and text explanations using branching questions to guide them to the answers they need. The answers and explanations agents find can be sent to customers in incident responses or relayed to customers over the phone. Guides can also be made available to customers on the customer portal to help them find their own answers to questions.

hash

A ten-digit alphanumeric string used to identify a specific hive, page, group, or member for certain community functions.

help access level

An answer access level for context-sensitive answers. Help answers are not visible to customers except through special hyperlinks. See *context-sensitive answers*.

Hosting Management System (HMS)

An application used to manage a B2C Service update. It manages scheduling and notifications, and includes checklists of tasks that must be performed prior to and following an update to a new release.

hive

A resource entity, such as a blog or message board, used by community members to communicate about a central topic, theme, or goal. Hives are sometimes referred to as resources.

hive permissions

The set of permissions that allow members to perform specific actions in the hive, such as adding members, posting content, or commenting on posts.

hive privacy level

The hive access status determined by the community privacy level and hive permissions. See *community privacy level* and *hive permissions*.

hive template

A hive that is set to the Template status, making it accessible as a design template but not editable or searchable by the community. See also *hive*.

hive type

A classification used to organize hives and expand searching of related content.

HTML answer

A type of answer that appears to customers as standard HTML on the customer portal.

HTML editor

An editor for formatting and editing answers, mailings, campaigns, documents, questionnaires, invitation messages, and message templates in HTML without previous HTML experience.

identity provider

A third party that authenticates user information and sends verification to a service provider, such as B2C Service, allowing single sign-on for the user. See also *SAML 2.0 open login*.

IMP (import) file

A data file with an extension of .imp that is used by the Kimport utility to map values in the CSV file to columns in the database.

In Meeting

One of the default chat agent statuses. This status indicates that the agent is in a meeting and is unavailable to chat. The In Meeting chat agent status has an Unavailable status type.

Inactive

One of the default opportunity statuses and status types. An opportunity with the Inactive status is no longer being pursued but could be activated at a later date.

inbox

An agent's personal queue consisting of all the incidents that have been assigned to the agent.

inbox limit

The maximum number of incidents in an agent's inbox that cannot be exceeded when pulling from a queue. The inbox limit is set in the profile to which the agent is assigned.

incident

Any question or request for help submitted by a customer through the Ask a Question page, email, a chat session, site or answer feedback, or from an external source using the API. Incidents can also be added by agents when they work with customers by phone, fax, or mail, and when responding to a private Twitter message.

incident archiving

A process that permanently removes incidents from the database. Archived incidents are then stored in searchable data files. Staff members can access archived incidents once the Archived Incidents component has been added to their navigation set.

incident custom field

A field for gathering and displaying additional information about incidents. Incident custom fields appear when adding or editing an incident and on the Ask a Question and Support History pages on the customer portal.

incident thread masking

A method of protecting sensitive customer information, such as social security and credit card numbers, from displaying in incident threads. Three default system masks are available and custom masks can be created.

incident queue

A sequence of unassigned, unresolved incidents. When an incident queue is added, it can be defined as the default queue. Incidents are added to queues automatically by business rules or manually by re-queuing and are handled in a first-in, first-out manner.

incident severity

An option for classifying and recording an incident's importance and urgency.

incident status

A method of tracking an incident's state. The default incident statuses are Solved, Unresolved, Updated, and Waiting, and custom statuses can be added.

incident status type

The status of an incident as it moves through the system. Default incident status types are Solved, Unresolved, and Waiting.

incident thread

The list of all activity on an incident, including the original question, agent responses and updates, customer updates, records of conversations, and internal notes about the incident (which are not visible to customers). The incident thread lists activity in chronological order and can be filtered by thread type.

index

A database item that can be added to a database field to speed up searches for information in the field. Adding an index to a field increases the amount of time it takes to write information to the field, and indexing a large number of fields decreases the overall responsiveness of the database. Generally, only fields containing a large amount of information

that are regularly searched on should be indexed. In B2C Service, indexes can be added to most custom fields and custom objects. See also *custom field* and *custom object*.

indexing

A process in which the text of an answer or incident is stemmed and indexed into keywords and phrases. These keywords and phrases are used to build the answer and incident phrases tables that are used during text searching. When an answer is added or updated, the Keywords, Summary, Question, and Answer fields are stemmed and indexed to create one-, two-, and three-word phrases. When an incident is added or edited, the Subject field and incident thread are stemmed and indexed to create one-word phrases.

industry type

An option for classifying organizations by type of industry.

information gaps

A report that clusters incidents and compares the topics to answer clusters, allowing organizations to pinpoint those areas (or gaps) in the knowledge base needing additional answers.

initial state

A required state in every rule base. The rules engine evaluates a new or updated object using all rules in the initial state. Unless one or more rules in the initial state transition the object to a function or different state, the rules engine stops after all the rules in the initial state have been processed. See also *rule state*.

inline

A method of displaying output definitions and filter definitions as lines of text in the report. See also *output definition*.

inlay

A portion of code controlling a number of functions that you can deploy on an external web page or on traditional customer portal pages.

inline editing

A feature for editing values directly on a report without having to open each record to make changes. Staff members can edit individual values in one record or select several rows to change values in multiple records. Staff members must have permission in their profile to edit the specific record type, and inline editing must be enabled in the report.

inner join

A relational database operation that selects rows from two tables on the condition that the value in the specified column of the primary table is equal to the value in the specified column of the secondary table. See also *outer join*.

interface

The console, windows, and pages used by staff members and customers to access a B2C Service application and interact with a single knowledge base. The interface name determines the URL for the website, the name of the executable, and the .cfg directory name. See also *administration interface* and *agent desktop*.

Interface Manager

A utility for managing multiple interfaces using one knowledge base.

invitation method

A way of distributing a broadcast survey, transactional survey, or website link survey.

Kexport

A utility for exporting either single tables or an entire database from an B2C Service application.

Keywordindexer

A utility that creates an index of the keywords found in incidents, answers, file attachments, and documents indexed by the Web Indexer. The keyword indexes are used when searching incidents, answers, file attachments, and other indexed documents. See also *Web Indexer*.

Kimport

A utility for importing data, either single tables or an entire external database, into the database.

knowledge base

All information (such as answers, assets, incidents, contacts, organizations, opportunities, products, staff accounts, tasks, mailings, and campaigns) maintained and presented by B2C Service in a meaningful way. Knowledge base also refers to the interrelationships among the pieces of information.

knowledge engineer

The staff member responsible for populating and maintaining the answers in the knowledge base. Responsibilities may include identifying when answers should be added, editing proposed answers, and reviewing existing answers to keep them current.

Langcvt

A utility for changing the language pack in Oracle Service Cloud from English to an alternative language pack. This utility converts the message bases and pre-populated knowledge base to the new language.

language

The language for a specific interface that determines, in part, what answers are visible for viewing by customers.

Launched

A mailing and survey status that indicates a transactional mailing or transactional survey has been launched and can be included in a rule or campaign.

layout

A predefined format that can be used in custom reports to apply fonts, colors, and other display options. Layouts can also be used in dashboards to apply a predefined structure for inserting reports.

lead

A potential opportunity. A lead is a contact discovered through a marketing campaign and forwarded to a sales representative through Opportunity Tracking. See *opportunity* and *Opportunity Tracking*.

lead rejection type

An option for classifying and recording the reasons for rejecting a lead.

leaf level

A level of product, category, or disposition that does not contain any sublevels. See *product linking*.

learned link

Related answers that have a learned relationship as a result of customer activity.

Live Chat

A link on the sidebar on the Customer Portal template that customers can click to submit a request to chat with a chat agent.

Live Media bar

The toolbar that displays when Chat is enabled. The Live Media bar allows agents to log in, log out, set their status, and manage chats. See *Chat*.

local settings

Customizations made by staff members to dialog and tool window sizes and locations, as well as content pane and navigation pane settings, console color and tint, toast notifications, and report appearance, including display and data settings and column formatting. Changes made by staff members to customize these settings affect only their workstation. In addition, staff members can return to the system defaults at anytime.

logical expression

An expression that defines the relationship between report filters or business rule conditions. The components of a logical expression are joined using Boolean logic and can be grouped and joined with AND, OR, and NOT operators.

logical operators

The symbols, (+) and (-), that can be used in most search techniques in Service to explicitly find answers that have a word (+) or that do not have a word (-).

Login window

A dialog box for entering user name, password (if required), and site information to access the administration interface of a B2C Service application.

Lookup field

A field in a custom object designated to store values that are used as the names of the object's records. These names display on editor tabs and the navigation pane's Recent Items list. For instance, the Recent Items list displays incident reference numbers since the Reference # field is designated as the lookup field for incidents. Values in lookup fields are also displayed in reports instead of the ID values from fields in other tables that link to the lookup field's table. For instance, while the *incidents* table's Assigned Account field stores account ID numbers, the values displayed for this field in reports are from the *accounts* table's Full Name field.

Lost

One of the default opportunity statuses and status types. An opportunity with the Lost status has been lost, for example, to a competitor.

mailbox

An email box specified in B2C Service and dedicated to collecting email inquiries sent by customers, responses to mailings, and bounced messages. Incoming emails are processed by the Techmail utility. See also *Oracle-managed Service mailbox* and *Techmail*.

mailer daemon (rnmd)

A utility that monitors Outreach and Feedback, listening for requests from other components to start the email process. The mailer daemon is installed during the initial installation and can be configured to send messages in the most efficient manner for an organization.

mailing

A collection of one or more messages sent to one or more contacts. A mailing can contain multiple messages for testing purposes.

mailing status

A method of tracking the state of a mailing. The default mailing statuses include Draft, Launched, Scheduled, Preparing to Send, Sending, Suspended, Suspended by Error, Canceled, and Completed.

manual policy

A pull policy that enables agents to manually pull incidents into their inbox from any queue designated in their profile.

manually related answer

A relationship between two or more answers manually defined by a staff member.

market testing

A method for testing different message formats in mailings and surveys on a percentage of the audience before launching a final email. For broadcast mailings and surveys, market testing is available in even split and random sampling modes. For transactional mailings and surveys, market testing is available in audience sampling mode. See *audience sampling mode*, *even split mode*, and *random sampling mode*.

mask

A defined pattern that determines the format of information that can be typed in a field.

matrix question

A question type for displaying a series of survey questions in a table. Matrix questions are useful when a group of questions can be responded to with the same set of answer choices.

member

A community user who has a login and can be associated with one or more groups in the community.

member type

A classification for community group members that defines their role and provides access to certain group functions.

merge field

A variable field that looks up account, contact, incident, opportunity, organization, or tracked link information and inserts it in the text of a document, snippet, document template, message template, quote template, or the message content and mail attributes of mailings and surveys.

merge report

A report that can be included in marketing and survey content that dynamically limits the data returned so that customers see only their own information. For instance, if the report lists contacts and their open incidents, customers see only their own open incidents.

message

An email consisting of a collection of HTML, text, and images in a particular format.

message base

An editable text string that allows international language support and customization of headings, labels, buttons, and other text on the administration interface and customer portal and in email messages and notifications.

Message Bases editor

The interface element used to customize the message bases, including all the headings, labels, buttons, and other text, on the administration interface and customer portal.

message templates

A component for customizing and standardizing the content of administrator notifications, administrator emails, and contact emails. Message templates consist of a global template, which is used to standardize the design of outgoing messages, and a set of system-generated messages. See also *global template*.

migration

The process of moving from one version of the Customer Portal framework to a newer one. Migration can occur independently of updating to a newer version of B2C Service. See also *updating*.

mobile customer portal

The template and set of customer portal pages that have been optimized for display on mobile devices such as iPhones, Androids, and Palms. See also *template* and *reference implementation*.

Monitor

A feature in Chat that allows a supervising agent to monitor the chat sessions of other agents and to intervene when necessary.

Msgtool

A utility for creating a configuration report for a B2C Service site, or for changing configuration settings when an error has been made in one of the settings that subsequently locks staff members out of the Configuration Settings editor.

multi-select

A feature for updating more than one record at a time.

multiline

A method of displaying report data grouped under headings based on common values in report columns.

natural language

Any approach that accepts and correctly handles human language. For example, English, French, and Japanese are natural languages, while computer languages, such as FORTRAN and C, are not. The knowledge base can be searched using natural language technology.

navigation buttons

The buttons on the navigation pane associated with record types and components. Clicking a button displays the record type or the component's navigation list.

navigation list

All the reports, folders, and items associated with a specific record type or component in B2C Service. Navigation lists are organized in a tree on the navigation pane.

navigation pane

The area on the left and right side of the console where staff members work with navigation lists, select items to open on the content pane, and search the knowledge base. In the default configuration, the left navigation pane contains Recent Items and Navigation tool windows; the right navigation pane contains the Quick Search tool window. What appears on the navigation pane depends on the navigation set assigned in each staff member's profile and the permissions assigned in the profile. Each navigation pane can also be customized by staff members. See also *Configuration button*, *navigation buttons*, and *Tool window*.

navigation set

Any combination of navigation buttons and their associated navigation lists. The Configuration button can also be added to navigation sets. Staff members are assigned a default navigation set in their profile.

next-update checklist

The UMS checklist that keeps track of all recurring tasks for each product enabled in your application. When the next update is scheduled, the tasks in this list checklist are automatically added to the pre-update checklist.

normalized URL

A URL that has been reformatted to ensure that documents that are referred to by multiple URLs will be indexed only once. Normalization may include reformatting domain names (for example, removing capital letters) or removing query parameters.

note

Information that can be added to campaigns, contacts, documents, mailings, opportunities, organizations, and surveys for internal reference. Notes can also be added to incidents in the incident thread.

notification

A message that notifies appropriate staff members about incidents, answers, mailings, campaigns, opportunities, and system errors. See also *Answer update notification*.

object

Any standard or custom table in the Oracle database. Object also refers to the specific answer, contact, incident, chat session, opportunity, organization, target, or task that is evaluated by the rules in the object's rule base. See also *custom object*, *standard object*, and *rule base*.

object event handler

A PHP script with an integrated test harness (automated test script) that executes as the result of an event occurring on a standard or custom object in B2C Service. See also *custom object*, *standard object*, and *process model*.

On Break

One of the default chat agent statuses. This status indicates that the agent is on break and is not available to chat. The On Break chat agent status has an Unavailable status type.

open login

The ability to log in to the customer portal using an already established external account, such as Facebook, Twitter, or Google. When the external site validates the customer and the customer approves the transfer of information to B2C Service, a contact record is created using the email address and the customer is automatically logged in to the customer portal.

operating system

The program that, after being initially loaded onto the computer by a bootstrap program, manages all other programs in a computer. UNIX, Windows, VMS, OS/2, and AIX are all examples of operating systems.

operational database

The database that contains the live data that is viewed, retrieved, and edited in a B2C Service application. While reports that are run on the operational database can access real-time data, the reports cannot process as much information as reports that are run on the report database. See also *report database*.

operator

A symbol or word that represents a mathematical or logical action that can be applied to a condition or value.

opportunity

Information about a specific sale or a pending deal that is tracked and maintained in the knowledge base.

opportunity custom field

A field for gathering and displaying additional information about opportunities. Opportunity custom fields appear when adding or editing an opportunity.

opportunity status

A method of tracking an opportunity's state. The default opportunity statuses are Lead, Reject, Active, Closed, Lost, Inactive, and Dead. Custom statuses can also be added.

opt-in

The explicit granting of permission by a contact to receive email communications from an organization. Opt-ins can be specific to certain mailing lists or applied globally across all mailing lists.

opt-out

An explicit request by a contact to be removed from a specific mailing list or from all lists, most often communicated by email or web form. Also called *Unsubscribe*.

Oracle-managed Service mailbox

The recommended type of Service mailbox created by Oracle. Oracle configures the initial mailbox setup, including enabling incoming email and defining the Pop Server, POP Account, and Password fields. Administrators can also create general Service and Outreach mailboxes for their application.

post-update checklist

A UMS checklist that contains tasks that are specific to and created by your organization. The tasks on this list are enabled when your update is complete. See also pre-update checklist and next-update checklist.

Analytics

A business reporting solution that enables organizations to capture, organize, present, and disseminate real-time actionable knowledge with speed and ease. Using Analytics, organizations can increase insights by identifying customers based on previous interactions across all channels.

Chat

A component that provides customers with access to chat agents for questions and issues that require human interaction.

Connect Desktop Integration (JavaScript API)

A public API that enables customers and partners to integrate data contained on a workspace with a web page that is contained on the workspace. If external information is presented about the current record in a web page, this API can be used to update or read workspace data from the web page. See also *workspace*.

Connect PHP API

A backward-compatible, public API that enables customers and partners to integrate with the B2C Service platform using PHP scripts. Connect PHP API is primarily used to integrate with the customer portal, but it can also be accessed through the File Manager, process designer, and analytics. Connect PHP API leverages the Connect Common Object Model, which is also leveraged by *Connect Web Services for SOAP*.

Connect Web Services

A backward compatible, public API that enables customers and partners to integrate with the B2C Service platform using industry leading standards such as WSDL 1.1 and SOAP 1.1. It provides broad support for a wide variety of languages, platforms, and tools. Connect Web Services leverages the Connect Common Object Model, which is also leveraged by Connect PHP API. See also *Connect PHP API*.

Customer Portal

The website interface that customers access for customer support. The customer portal is integrated with Service so customers can query the knowledge base for answers, ask questions, provide feedback, manage their customer account, and request chat sessions. It consists of a standard set of files that can be customized, uploaded, staged, and promoted to make the site available to customers. See also *Mobile customer portal*.

B2C Service (Service)

A customer service and support solution that intelligently assists both customers and agents with inquiry resolution across standard and social channels. Service assists customer service and support organizations that need to easily capture, respond to, manage, and track all service interactions in one consolidated application.

Desktop Add-Ins

An add-in framework for the B2C Service platform that enables customers and partners to build custom .NET components, controls, and applications for the agent desktop. See also *agent desktop*.

Feedback

A customer survey tool for gathering information about customers' experiences with an organization. With a wide range of customization and formatting options, questions types, and full analytics for efficient reporting, surveys provide organizations with a flexible method of tracking customer satisfaction.

Opportunity Tracking

A sales automation solution that enables staff members to easily manage all opportunity, organization, and contact information and track all quote interactions in one consolidated application.

Outreach

An email and campaign solution for delivering personalized, richly formatted email communications to targeted segments of customers and prospects and for launching full-scale marketing campaigns.

Self Service

A Facebook application that provides access to customer-facing features of B2C Service, such as Find Answers and Ask a Question, directly from Facebook's web and mobile interfaces.

Social Experience

A set of complementary components, including Communities, Channels, and Self Service for Facebook, each representing a different, powerful way of interacting with customers using social media. While each component serves a distinct purpose, they can be used together to create a wide-ranging social web presence.

Social Experience communities

A comprehensive social web solution consisting of B2C Service Community and B2C Service Innovation Community that lets customers connect, discuss, and contribute through forum discussions, question-and-answer sessions, resource libraries, and suggestions for service improvements.

Oracle B2C Service

A customer experience suite combining web, social, and contact center experiences for a unified, cross-channel service solution in the cloud.

Smart Client

The web-based software that allows local applications to interact with the server-based applications. The smart client can be installed on staff workstations using the Click-Once installer. See also *Click-Once installer*.

standard object

Any standard table that is native to B2C Service. Standard objects store data, including record types such as answer, contact, incident, opportunity, organization, and task. Other standard objects include accounts (staff accounts), assets, quotes, and sales products. See also *custom object* and *object*.

organization

Any company, business unit of a large company, or government agency that has an organization record in the knowledge base.

organization address type

A way of storing multiple addresses for a single organization. The default organization address types are Billing and Shipping; custom address types can be added.

organization association

A feature for associating a contact with a specific organization. Organization association links the incident and opportunity history of the contact and organization.

organization custom field

A field for gathering and displaying additional information about organizations. Organization custom fields appear when adding or editing an organization.

organization hierarchy

A feature for creating or changing the hierarchy of organizations. A hierarchy can be created by making one or more organizations subordinate to another organization. Twelve hierarchy levels can be used.

outer join

A relational database operation that selects rows from two tables regardless of whether the specified columns contain corresponding values. An outer join will return all rows from the primary table and any rows from the secondary table where the value in the specified column of the primary table is equal to the value in the specified column of the secondary table. See also *inner join*.

output definition

A description of a report that can be viewed when generating a report or when hovering over the report title and columns. Output definitions are predefined for all standard reports and can be defined when creating a custom report.

output level

A distinct section of a report that outputs report data. Reports can have multiple output levels, each of which can have their own filters, groupings, data exceptions, headers, footers, and descriptions. Output levels in a report are related through drill-down links and drill-down filters.

owner

The member who holds complete authority over a community group or hive. A member who creates a group or hive is designated as its owner unless ownership is transferred.

page

A web page or a customer portal page in an Oracle Service Cloud application.

page set mapping

The customer portal functionality that allows a specific page set to be mapped to a specific user agent. Customers are then directed to the most appropriate page set as determined by the browser or user agent accessing the customer portal.

panel

A customizable object used to display dynamic content on community pages. Panels can be added to custom pages and some standard pages. See also *custom page*.

path

The connector between items in a campaign flow diagram. A path can be one of four types (Standard, Submit, Yes, or No) and can connect two actions or an action and a decision in campaigns. See also *action* and *decision*.

Personal settings

An application option that lets staff members override settings in their staff account and customize settings that apply to the interface defaults in B2C Service. Settings defined in staff accounts that can be changed include default currency, default country, time zone, and email notifications. The staff account settings changed from the Personal Settings option will also be made to the corresponding settings in the staff account.

polling survey

A survey that displays as a single question on a customer portal page or any page external to the customer portal. After customers submit their response, they see a poll results chart or a thank you message. See also *Customer Portal*.

post

Content added by users of a social media site, such as a Facebook status update or a text entry in Social Experience communities. See Social Experience communities.

post type

The structure of a post as defined by the sequence of fields and controls used to create its content.

pre-update checklist

The UMS checklist that becomes active when you request an update. It includes a list of Oracle-created tasks and any custom tasks that should be completed before your update.

preliminary screen pop

The toast notification that displays when an incoming chat request is received. The preliminary screen pop displays as a two-column table, and agents can view information about the chat request before accepting or declining the request.

Preparing to Send

A mailing and survey status that indicates a broadcast mailing or broadcast survey is about to be sent.

price schedule

An option for creating various pricing levels that can be assigned to sales products. Price schedules allow the same product to have different prices, such as wholesale and retail prices.

primary contact

The main individual associated with an incident or opportunity. All primary contacts have an associated contact record in the knowledge base. In Service, a primary contact must be associated with an incident for agent responses. In Opportunity Tracking, either a primary contact or an organization must be associated with an opportunity to serve as a point of contact for sales representatives during the sales process. See also *contact*.

primary key

A database table column that is indexed to enforce a unique constraint, meaning that a given value cannot appear more than once in the column. This column is used to uniquely identify each record in the table. Primary keys are often the target of a foreign key in a different table. See also *foreign key*.

priority

A ranking that defines the order in which incidents are pulled from multiple queues. The priority ranking also identifies which queues agents can retrieve incidents from.

private

One of two default answer status types. Answers that are marked Private are never visible to customers. See Answer status type.

private key

A password-protected key used by the holder to create digital email signatures and decrypt messages that were encrypted using the holder's associated public key.

privileged access answers

Answers that are assigned a custom access level for viewing by certain contacts and organizations assigned to the appropriate service level agreement (SLA). See SLA.

process model

The virtual container that encompasses all event handlers (standard and custom) in B2C Service. Using the process designer, a process model can be exported, imported, deployed, and rolled back. See also *custom object*, *object event handler*, and *standard object*.

product catalog

The list for organizing sales and asset products. See Asset product and Sales product.

product linking

An option for linking products to categories and products to dispositions so that category and disposition choices are narrowed to only those associated with the selected product for staff members working with incidents and customers searching on the customer portal.

Production area

The set of publicly available customer portal files and pages. The production area is updated when files in the development folder are staged and promoted. See also *Development area*.

profile

A mechanism for controlling access to administration functions and for assigning staff members specific permissions, default workspaces, a default navigation set, and report access.

promote

To copy all customer portal pages from the staging area into the production folder, where they become publicly available on an organization's website.

proof

A way to review the content of a mailing or survey to ensure the message is approved by the necessary contacts and staff members and as a final check for any mistakes. Proofs can be sent to a proof list or group of staff members who, in turn, can accept or reject the proof. Proof messages can also be sent to staff members when changes have been made to message templates. See also *message templates*.

proof list

A contact list that is available to receive proof messages, enabling its contacts to review mailings and surveys before they are finalized.

propose answer

A function for proposing that an incident's solution be added to the answers available to customers. The proposed answer is reviewed by the knowledge engineer, who determines if it should be made public and, if so, its access level, status, language, and visibility.

Proposed

One of the default answer statuses. This answer status indicates that the answer has been proposed by a staff member from an incident. Answers with a Proposed status are not visible to customers. See Answer status.

Public

One of the default answer statuses and status types. Answers marked Public may be visible to customers depending on their access level and language. See Answer status and Answer status type.

public certificate

See Certificate.

public key

Public information that may be attached to email messages to allow those who reply to the message to encrypt their response. The public key also verifies that the digital signature was created with the associated private key, thereby ensuring the integrity and authenticity of the message. Public keys are often referred to as public certificates, although certificates hold additional information besides the public key.

public key certificate

See Certificate.

publish report

A method of preserving a report's graphical and tabular output as a snapshot. After a report is published, it cannot be modified and the report data will remain unchanged even as the knowledge base is updated.

pull policy

The method for determining which queues agents can retrieve incidents or receive chat requests from and in what order. Pull policies include Strict Priority, Manual, and First Due.

pull quantity

The specified number of incidents to be retrieved from the queue at one time when an agent pulls incidents.

question

The main element in a survey. Text, choice, and matrix question types can be created. Questions can be used in multiple surveys, mixing and matching as necessary. See Choice question, Matrix question, and Text question.

questionnaire

The complete set of questions and all the pages in a survey. Using the HTML editor, staff members can create dynamic surveys using a graphical interface to add questions and create survey branches based on how customers answer. A questionnaire must be created for each survey.

queue

See *Chat session queue* and *Incident queue*.

queued report

A report that has been manually or automatically scheduled to run in the background after entering the report's search criteria. When a queued report has been generated, a toast notification displays with a link to open the report.

Quick Access toolbar (QAT)

One or more buttons used as shortcuts to commands on the ribbon. The initial set of buttons on the Quick Access toolbar is specified by what displays on the content pane, but staff members can customize the toolbar to add frequently used buttons. By default, the Quick Access toolbar appears above the ribbon.

Quick Search

A component used to search for records and files when only limited information is known. Quick Search can be used to search the knowledge base no matter what navigation list displays or what is open on the content pane. B2C Service contains a number of default Quick Search reports, and other reports can be added to the Quick Search button in navigation sets.

quota

The revenue goal assigned to a sales representative during a specified time period, such as month or quarter.

quote

A formal price assigned to a sales product for a particular customer during a sales period. Quotes also include any discounts applied as well as the valid dates for the quote.

quote custom field

A field for gathering and displaying additional information about quotes. Quotes custom fields appear when sending a quote with an opportunity.

quote template

A template defined for a specific type of quote. Quote templates are used when generating a quote for an opportunity. See also *quote*.

random sampling mode

A market testing option for broadcast mailings and surveys that sends test messages to a specified percentage of the audience. See *market testing*.

record

Any individual answer, asset, contact, incident, opportunity, organization, or task in the knowledge base. Records can also be created for custom objects, which can be added to B2C Service to integrate organization-specific data with the Oracle database. See also custom object, standard object, and record type.

record type

A database table that stores all records of the same type, such as answers and incidents. See Record.

record pool

The memory space used to temporarily store all records loaded in a single desktop workflow session. See Desktop workflow.

record tabs

The layout of information contained in a record. Each tab contains specific fields and options related to the record that can be viewed and updated as necessary.

recurrence

A scheduling method used to send or initiate the same report, mailing, survey invitation, campaign, or cloud search on a regular daily, weekly, monthly, or annual basis.

reference implementation

The standard set of files used to create the default customer portal as it exists without customization.

regular expression

A combination of operators and character strings used to define a search field or a condition statement in a business rule.

Reject

One of the default opportunity statuses and status types. A lead with the Reject status has been rejected by a staff member.

related answers

A feature that assists customers in finding answers to questions related to the current web visit. Related answers appear on the answer details page and are sorted by relatedness those answers that appear at the top of the list are most related to the answer being viewed.

relationship item

A control used to create workspaces. Relationship items can include lists of records as well as other information such as audit logs and file attachments.

relative time

The amount of time between events based on the business work hours defined in service level agreements or default response requirements. Some functions, such as `rel_date_diff()`, support relative time values, as do some database fields such as `inc_performance.rel_time`. Note that the Relative option available for use in some filters has a different meaning where a dynamic time period can be defined instead of a time period using a static date and time. See also *absolute time*.

relative value

A field value set by a workflow, script rule, or workspace rule that adds or subtracts, appends, or prepends, a value to the field's previous value (for instance, increasing the value of an integer field by 1).

report

Any standard report, custom report, or list of records accessed from a navigation list on the navigation pane. Standard and custom reports can also be accessed from the Reports explorer. Reports are also used to display lists of answers or a customer's incidents on the customer portal.

report database

A copy of the operational database that is used for reporting purposes. Reports that are run on the report database can process more information than reports run on the operational database. The data in the report database is copied from the operational database at scheduled intervals and therefore may not be as current as the data in the operational database. Also called *replication database*. See also *operational database*.

report control

A control that inserts a report into a workspace. See also *workspace*.

report linking

A feature for creating links between reports. Linked reports and dashboards can be seamlessly opened from other reports, just as report levels can be opened from other levels in the same report. Both conditional and unconditional links can be created.

report schedule

An option for subscribing to a standard or custom report. Staff members can schedule the report to be sent to an individual staff member, a group of staff members, a distribution list, an external email address, or any combination of these options.

report section

A section of an output level that contains a component of the report's output, such as a title, chart, or tabular data.

report variable

An item added to a report that is used to return different data or data in different formats in the same column. For example, a single report can be created that displays the number of incidents by staff member, group, queue, or status. When running a report, the variable value is selected from the Search window or from docked filters.

Reportgen

A scheduled utility that sends out scheduled reports. See Report schedule and Scheduled report.

re-queuing

The action of moving an incident from an agent's inbox into a queue.

resolution time

The maximum allowable time (in minutes) set by a service organization for resolving incidents. See also *response requirements*.

response interval

The days of the week and times when a service organization makes itself available to respond to and solve incidents on a daily basis. Days and hours can be specified. See also *response requirements*.

response requirements

The maximum time allowed (in minutes) for incident response and resolution within the operating hours defined by the organization. The response requirements are used to measure agent performance in responding to and solving incidents and can also be used for SLAs that do not have customized response requirements. See also *SLA* and *response interval*.

response time

The maximum allowable time (in minutes) set by a service organization for initially responding to new incidents. See also *response requirements*.

result grouping

A feature in a report definition for selecting fields to group data by. Result grouping provides a more organized view of a report. Multiple levels can be defined for result grouping. The more levels used, the finer the detail will be.

Review

One of the default answer statuses. This status can be used to notify the knowledge engineer when a public answer needs to be reviewed. See also *answer status*.

ribbon

All the tabs and buttons for performing actions and functions on an entire report, individual records in a report, or items in an explorer tree or list. The buttons on each tab are grouped by related functions, and each group is labeled. The tabs and buttons on the ribbon change based on what displays on the content pane.

rollover

A method of displaying additional report details by hovering over data described in the report's output definition.

rollup

A method of displaying report data that groups records together by specific fields. The grouped records are displayed under headings that can be expanded or collapsed to display or hide the records under the heading.

root certificate

A self-signed certificate generated by a party that signs other public certificates. Certification authorities may authorize other entities to issue certificates. The root certificate belongs to the top-level certification authority.

round-robin queue

A type of incident queue in which unresolved incidents are automatically assigned to agents in a rotating fashion.

RPA (responses per assignment)

A statistic that calculates the average number of times a staff member or group responded to each incident.

RSS (Really Simple Syndication)

The primary standard used for the syndication of web content. RSS is an XML-based format used primarily for distributing news headlines on the Internet. B2C Service contains an RSS channel so staff members can monitor RSS feeds for content.

rule

See *Business rule*.

rule base

All rules, states, functions, and variables associated with a particular object type (answers, contacts, incidents, chat sessions, opportunities, organizations, targets, and tasks) in business rules.

rule log

A feature for viewing the rule or rules that have fired against a specific answer, contact, incident, opportunity, organization, or task. See also *business rules*.

rule state

A container for business rules. Every rule base must contain an initial state, and states can be added to handle all stages of object processing. Rules in the initial state can transition objects to other states in the rule base. See also *initial state*.

rules engine

The software that evaluates objects to determine if they meet the conditions of any rules in the rule base and then executes the actions defined in the rules.

runtime selectable filter

A component that defines the initial data set available in a report and allows staff members and customers to customize the data returned. Runtime selectable filters are statements constructed from expressions, functions, and operators, and can be customized when running a report.

S/MIME (Secure Multipurpose Internet Mail Extensions)

A standard for sending secure email messages that can verify the sender's identity. S/MIME emails can be encrypted for security and signed to verify authenticity.

safe mode

A login method that allows staff members to log in to B2C Service without activating add-ins. Safe mode is available after malfunctioning add-ins have prevented administrators and staff members from logging in. See Add-in.

sales period

The period of time used to track the revenue goals assigned to each sales representative. The default sales periods are annual, semi-annual, quarterly, monthly, and weekly.

sales product

An option for identifying items or services sold by an organization. Sales products can be added to quotes and promotions.

sales products custom field

A field for gathering and displaying additional information about sales products. Sales products custom fields appear on the Custom Fields page of the Product Details editor.

sales representative

A staff member who may be assigned opportunities and who may also maintain contact and organization records.

SAML (Security Assertion Markup Language)

An XML-based protocol in which an identity provider authenticates a user's identity and passes that information to a service provider, which can then decide to allow the user access to the service without requiring an additional login procedure. See also *identity provider*, *SAML 2.0 open login*, and *single sign-on*.

SAML 2.0 open login

A type of single sign-on that uses Security Assertion Markup Language (SAML) and is the protocol that B2C Service uses for its single sign-on feature. See also *SAML* and *single sign-on*.

Scheduled

A mailing and survey status that indicates a broadcast mailing or broadcast survey is ready to be sent and will be emailed at the scheduled send date and time.

scheduled report

A report that is sent as an HTML email or HTML email attachment to staff members, distribution lists, or external email addresses at specified times. Scheduled reports can also be sent when alerts defined in data exceptions are triggered. See also *exception*.

schema

The structure of a database system described in a formal language supported by the database management system. In a relational database, the schema defines the tables, the fields in each table, and the relationships between fields and tables.

score

A calculated value that ranks the order of displayed answers. An answer's score is determined by its solved count and any display position that was set when the answer was added or updated. Score also refers to the relative weight assigned to each choice in a choice question for surveys. Score values can be used for survey calculations to trigger rules or campaign actions based on a contact's answers and also for reporting purposes.

screen pop

See *Third-party screen pop*.

script

A control that can be added to a custom workspace to help staff members enter record information in a logical order. Scripts can contain multiple pages with fields and other controls as well as branching logic to guide staff members to different pages based on actions they take on a script page.

script rules

A type of rule used to trigger actions, such as setting the value of a field, on script pages when specified conditions are met.

search and selection criteria

The runtime selectable filters and sorting options that can be defined when searching for a particular record. See also *runtime selectable filter*.

search index

A matrix that includes a list of important words within a document and their document of origin, allowing efficient searching. In some cases, the matrix is a database table. In other instances, the matrix is a file stored on a hard drive. For a word or phrase to be searchable within an incident, answer, file attachment, or external document, it must first be indexed.

search priority word

A word that is associated with an answer or a document. The associated answer or document will always display to customers when the search priority word is included in their search text.

secure email

Incoming and outgoing email that has authenticity (the sender is who it appears to be), integrity (content has not changed during transmission), and privacy (only the intended recipient can read it).

seeding

The initial set of answers in the knowledge base.

segment

The criteria for creating dynamic lists of contacts based on user-defined filters. Multiple filters can be created and logical expressions can be used to create the exact data set needed to target contacts. After a segment is created, it can be used in broadcast mailings and surveys and the group of contacts will be constantly adjusted and updated as they meet or fall outside of the segment's requirements.

self-learning knowledge base

The automatic generation of self-service content based on customer interactions so that the most pertinent information is presented. See also *knowledge base*.

sender ID

A form of email authentication that identifies IP addresses authorized to send mail on behalf of a specific organization. Sender ID differs from SPF authentication primarily by the components of the email used to authenticate the message.

Sender Policy Framework (SPF)

A form of email authentication that identifies IP addresses authorized to send mail on behalf of a specific organization. SPF differs from Sender ID authentication primarily by the components of the email used to authenticate the message.

Sending

A mailing and survey status that indicates the broadcast mailing or broadcast survey is currently being sent to contacts. The system automatically sets the status to Sending after the mailing or survey is done being prepared to send or at the scheduled date and time.

Service Console

The user interface where staff members work in B2C Service. Staff can add and edit records and items, generate standard reports and create custom reports, access their notifications, and chat with customers from this console. Administrators can also configure and customize their application from the console. Also called *administration interface* or *agent desktop*.

service level agreement

See *SLA*.

sharing

The process of sharing contacts, tasks, or both between Microsoft Outlook and B2C Service. All sharing functions are initiated from Outlook.

sibling answer

Related answers that share the same product or category. Sibling answers may also contain the same file attachments.

single sign-on

A method for a user (in B2C Service, a staff member or customer) to log in to one application, known as an identity provider, and then be authenticated and logged in to another application, such as B2C Service, without being required to log in separately to the second application. See also *identity provider* and *SAML 2.0 open login*.

sitemap

A page on a web server using the XML-based Sitemap protocol. The page typically lists all the URLs for a site along with metadata for each URL, including the priority of each page and when it was last updated.

SLA (service level agreement)

A contract that is applied to contacts and organizations specifying the level and type of customer service they are eligible to receive. Generic SLAs are created by administrators, and SLA instances are applied to specific customers, either automatically through business rules or manually by staff members. SLA instances are called service contracts on the customer portal and can be accessed from the Account Overview page. See also *response requirements*.

SLA instance

A customer's individual copy of an SLA. An SLA is a generic contract that has not been applied to a specific customer. An SLA instance is a copy of the generic SLA applied to a specific customer.

slicing

A method of grouping tabular report data by a common element. When slicing, a common value in a field can be chosen and only those rows that have that value will be returned in the report. Other slice groups can be selected from links or a tree element.

Smart Interaction Hub (SIH)

Functionality for directing customer interactions to the most qualified source for resolution by leveraging agent skills.

Smart Merge

A feature that allows staff members to merge similar answers in the knowledge base to provide more meaningful answers to customers and to reduce answer duplication.

SmartAssistant

Oracle technology that uses business rules to automatically suggest possible answers to customer email questions and Ask a Question queries. Staff members can use SmartAssistant to search for answers in the knowledge base that are related to an open incident or a current chat session. See also *suggested answers*.

SmartSense

Oracle technology that estimates a customer's emotional state or attitude based on the words and language the customer uses when submitting a question in Service. SmartSense also rates the incident responses sent by agents. The SmartSense ratings for both customer and agent appear wherever they have been placed on the workspace. In Feedback, SmartSense evaluates text questions submitted by customers in surveys.

snippet

Any text or part of a document that can be used in more than one document. Snippets can be added to documents from the Content Library component.

Solved

One of the default incident status types and incident statuses. An incident marked Solved has been resolved.

solved count

The method for determining where an answer will display in the list of answers. The most useful answers (those with the highest solved count) are pushed to the top of the list, while those with the lowest ratings are moved down on the list. When a customer clicks one of the options in "Is this answer helpful?" on the answer details page, it directly affects the solved count. The solved count is increased for answers that are viewed, and the last answer viewed has a higher solved count than answers viewed earlier in the same web visit. The solved count is also increased when an agent uses a SmartAssistant suggested answer when responding to a customer's question. By default, customer influence on an answer's ranking accounts for 75 percent of an answer's score, and agents affect 25 percent. Over time, an answer's solved count gradually declines as it is viewed less frequently.

sort order

The sort order of a report's output columns. The default sort order is defined when generating a report and can be modified when running the report.

spacer

A control that is manually added to a workspace to maintain the row and column arrangement when fields and controls are moved and removed or to create white space in a workspace.

special response

A short version of the answer that can be used as the excerpt text returned by search results. It can also be used to format the answer content based on how and where the answer displays. Special response can be used by products such as Oracle Digital Assistant and chat applications.

spider

See *Web spider*.

SSL (secure sockets layer)

An industry standard for secure Internet-based transfer of information.

staff account

The settings for a staff member authorized to access an B2C Service application, including user name, password, profile, group assignment, and email information.

staff account custom field

A field for gathering and displaying additional information about staff members. Staff account custom fields appear on the Custom Fields page of the Staff Accounts editor.

staff member

Any employee with a staff account and profile authorized to access a B2C Service application.

stage

To compile and optimize all the customer portal pages from the development folder, where they are created and tested, into the staging folder, where they appear exactly as they will when the staged files are promoted into production. Stage also refers to the level of completion of a particular opportunity within a specific strategy. Tasks can be defined within a stage and can be required to be completed before the opportunity can move to the next stage. See also *promote*, *strategy*, and *task*.

standard reports

The complete set of predefined reports available in B2C Service. Standard reports can be copied and used to create custom reports.

standard text

Any text prepared in advance that can be sent to customers when responding to incidents, appended to responses by a business rule, or sent by an agent during a chat session. Also called *standard response*.

State

A field that classifies how contacts and organizations were added and what actions have occurred since their creation. The State field is automatically populated when a contact or organization record is added or updated, and staff members can also manually update the State field. State field options include Service, Outreach, Opportunities, and any combination of the three. State also refers to the current stage of an object in rules processing. See *Rule state*.

status

The current state of an answer, incident, mailing, opportunity, survey, or task. See Answer status, Incident status, Mailing status, Opportunity status, Survey status, and Task status.

status type

The current state of an answer, incident, or opportunity. Default answer status types are Public and Private. Default incident status types are Unresolved, Solved, and Waiting. Default opportunity status types are Active, Closed, Dead, Inactive, Lead, Lost, and Reject.

stopword

A word that is not included in the keyword indexes in Service and is not searchable as a result. Pronouns, articles, and adverbs are common stopwords.

strategy

A sales plan defined by an organization that includes stages and associated tasks that must be completed in order for opportunities to move through each stage. Strategies allow organizations to define multiple sales plans based on their business processes and help ensure that policies and procedures are enforced.

strict priority

A pull policy that defines the order in which the system pulls incidents or chats from multiple queues. The strict priority ranking also identifies from which queues agents can retrieve incidents.

style

All of the specifications that can be defined for presenting graphical and tabular data in a report, including fonts, colors, and borders.

subscription

A type of cloud search that pulls all available thread content from a custom Facebook or RSS channel account at regular intervals. See also *cloud search*.

suggested answers

The list of answers from the knowledge base that is returned when SmartAssistant is invoked, either by staff members working on incidents or engaged in chat sessions or through business rules that append answers to email questions and Ask a Question queries from customers. See also *SmartAssistant*.

suggestion

A product recommendation automatically generated by Offer Advisor using a predictive model based on customer purchase history.

Support Home

The entry page on the customer portal. This page provides customers with quick access to the tools they need to answer their questions and receive immediate customer service.

survey

A method of gathering customer responses and feedback. Surveys can be sent as mailings, served as a web page, or sent as events triggered by a campaign or business rule. See Feedback.

survey status

A method of tracking the state of a survey. The default survey delivery statuses include Draft, Scheduled, Launched, Recurrence Scheduled, Preparing to Send, Sending, Suspended, Expired, Suspended by Error, Canceled, and Completed.

Suspended

A mailing and survey status that indicates a mailing or survey has been temporarily suspended from the Sending or Launched status.

Suspended by Error

A mailing and survey status that indicates a transactional mailing or transactional survey encountered an error and has been temporarily suspended.

synchronization

The process of collecting and combining contact and task records in B2C Service and Microsoft Outlook to ensure data is consistent between applications. Also called *sync*.

syndicated widget

A Customer Portal widget that can access the Oracle Service Cloud database from any external web page. The code used to place the syndicated widget on a web page is available under tag documentation on the Customer Portal Administration site.

system attribute

A customized field that can be added to account (staff account), answer, asset, contact, incident, opportunity, organization, quote, sales product, and task standard objects. System attributes can display in reports and workspaces,

and can be used when defining relationships between standard and custom objects. See custom object and standard object.

table instance

A component of a data set that specifies the database tables that data can be selected from and how database tables are joined in a report or segment.

target

A specific group of customers sharing common characteristics to whom a promotion is presented. A customer may belong to more than one target.

target rule

A type of business rule that has the sole purpose of creating a target consisting of contacts who meet the conditions established by the rule.

task

An action or activity scheduled to be completed within a specified time. Tasks can be standalone, or they can be associated with answers, campaigns, contacts, documents, incidents, mailings, opportunities, organizations, surveys, and stages in a sales strategy.

task custom field

A field for gathering and displaying additional information about tasks. Task custom fields appear when adding or editing a task.

task inheritance

A feature for linking a task's assigned staff member, contact, or organization to the equivalent value in a record associated with the task.

task status

A method of tracking a task's state. The default task statuses are Not Started, In Progress, Completed, Waiting, and Deferred.

Techmail

A scheduled utility that retrieves mail from specified POP3 mailboxes. Service processes some of the mail into new incidents and routes the incidents using business rules (depending on settings). Outreach and Feedback process bounced messages to assist in tracking incorrect email addresses.

template

A structured format used in a document in which specified sections are locked and cannot be edited and a section is open for customized content. The customer portal also uses templates to apply a uniform style to individual pages of the support site. Templates are also available as a starting point for creating a workflow's flow diagram, and templates can be added for community groups and hives.

territory

A specific geographical sales region configured in Opportunity Tracking. Sales representatives can be assigned specific territories for opportunity assignment. Up to twelve levels of territories can be defined.

test message

A mailing message that can be sent to small cross-sections of an audience to test a response before launching a final message.

text explanation

A text field that can be associated with a response in a guided assistance guide. The text explanation displays after an agent selects the associated response from a question in the guide. See Guided assistance.

text field

A customizable field containing text that is commonly added to reports. After a text field is created, it can be added to any custom report and then adjusted as necessary.

text question

A question type that allows customers to type their answer to a question.

theme

A group of related text responses to a survey question. Themes are created by topic monitoring and identified by common keywords. Themes are also used in the customer portal to apply CSS styling to multiple elements of a support site by applying a single theme. See Customer Portal and topic monitoring.

third-party screen pop

A feature that lets staff members open a Service Console or report from a third-party application. See Service Console.

Time Billed

A way to track the time spent responding to incidents. Data from the Time Billed field can be used for customer billing and for determining average incident resolution time.

Tool window

A default interface control on the Service Console for accessing reports, records, and items, and for searching the knowledge base. Recent Items and Navigation tool windows appear on the left navigation pane, and the Quick Search tool window appears on the right navigation pane. Tool windows can be put in any order, displayed in separate, floating windows, or removed from the console.

toolbar

One or more icons used as commands on a workspace. The initial set of icons on the workspace's toolbar is specified in the record type's workspace configuration, but administrators can customize the toolbar to add frequently used icons.

topic browsing

A feature that provides clustering and guided browse functionality on the customer portal so customers can browse specific topics to find related answers.

topic monitoring

A process that groups survey text responses into clusters of related responses called themes and labels each theme with keywords that define the responses. Topic monitoring is also used in social monitoring to group related cloud search results. See also *data mining* and *themes*.

tracked link

A link that can be tracked by Outreach and reported on for statistical purposes.

tracked link category

An option for classifying tracked links for reporting purposes. A tracked link category can have one subcategory level.

transactional mailing

A mailing that is sent only when an event occurs. Transactional mailings are sent to a contact when the contact meets specified criteria in a campaign and can be scheduled to be sent immediately, on a specific date, or at an interval in the future.

transactional survey

A survey that is sent only when an event occurs. Transactional surveys are sent to a contact when the contact meets specified criteria in a campaign or business rule and can be scheduled to be sent immediately, on a specific date, or at an interval in the future.

transfer

A feature in Chat that enables an agent to transfer a customer to another agent during a chat session.

trending

A method of predicting a trend for a specified date range in the future based on a report's current data. Trending periods are defined when creating or editing a custom report and can be included in standard reports.

trigger

The part of a script or workspace rule that defines the event that causes the rule conditions to be evaluated and (if matched) the rule action to occur.

Unqualified

One of the default chat agent statuses. This status indicates that the agent is not available to chat. The Unqualified chat agent status has an Unavailable status type.

Unresolved

One of the default incident status types and statuses. Incidents with an Unresolved status have recently entered the system, either by a customer or by an agent.

Unrestricted

One of the default chat agent statuses. This status indicates that there are no restrictions to the agent's availability to chat. The Unrestricted chat agent status has an Available status type.

Unspecified

One of the default chat agent statuses. This status indicates that the agent is logged out of Chat. The Unspecified chat agent status has a Logged Out status type and displays to agents by default.

Unsubscribe link

A link in a mailing that contacts can click to opt out of future mailings or surveys.

Updated

One of the default incident statuses. An incident marked Updated has been updated by a customer from Your Account. Updated incidents have an Unresolved status type.

Upgrade site

A site created during the update process. It has the latest version of the software, and data from your current production site. You can use it to test, configure, and prepare your site for the update.

updating

The process of moving from one release of Oracle B2C Service to a newer release. See also *migration*.

Update Management System (UMS)

A dynamic checklist tool that guides you through a series of tasks that test the core functionality of your updated site.

URL answer

A type of answer that consists of a link to an external URL. The URL address and the content of the web page are displayed.

user agent settings

The shortcut on the customer portal administration dashboard that allows page set mapping. See also *page set mapping*.

User link

A navigation element on community pages containing links to the logged-in user's profile, inbox, favorites, and subscriptions, and a sign-out option.

user type

The community role of a member account as defined by the nature of actions that the member is permitted to take.

utility

Any of a number of programs in B2C Service to help manage and configure an installation. Utilities include Agedatabase, Bulkdel, Dbaudit, Dbstatus, Kexport, Kimport, Langcvt, Msgtool, Reportgen, Techmail, and Wltool.

validation

The process of error-checking items such as desktop workflows, scripts, rules, advanced surveys, and campaigns. Items are validated to ensure that all required properties have been completed and that the configuration is functional. B2C Service also validates email addresses for industry-accepted formatting.

variable

A temporary data item in a rule base. The variable is assigned an initial value that can be modified through rule actions, used as a rule condition to trigger other actions, and restored to its initial value for the next round of rules processing. Variables also refer to shortcuts defined for a larger string that can be inserted in the body of an answer or inserted inline during a chat session. When the variable is inserted in the body of the answer or in a chat response, it is replaced with the value specified in the variable.

versioning

The system of numbering the Customer Portal framework and widgets to denote varying levels of changes. Major and minor changes are not backward compatible, while nano changes are applied automatically to all Customer Portal installations.

view partial

A reusable segment of code for common functionality that can be called from widget views to avoid duplicating the same code in multiple widget view files.

virtual assistant

A process of routing incoming chats to a simulated agent that uses knowledge base data to respond to customer questions. Virtual assistant chats can ease the volume of chats requiring an agent. See Oracle Virtual Assistant.

visibility

A setting that determines where a custom field or customizable menu item will appear. Visibility settings specify the interfaces in a multiple-interface installation where these fields appear. The settings can also define whether the fields appear on the administration interface and customer portal and whether certain custom fields with customer visibility can be edited.

Waiting

One of the default incident status types and incident statuses. An incident marked Waiting has been responded to by a staff member and is waiting for a response from the incident creator.

web form

A document in Outreach that allows contacts to input information that can be submitted to the database. Web forms are served as web pages by B2C Service.

Web Indexer

A search method that lets customers simultaneously search the knowledge base along with web pages and other web-accessible documents within a specified domain.

Web spider

A software application that visits web sites and reads their pages and other documents in order to create entries for a search engine index.

web visit

The period of time a customer spends looking for a satisfactory answer to a question. The end of a web visit generally occurs when a customer closes the browser or leaves the interface or when a specified time period elapses.

website link survey

A type of survey that is published as a web page and can be linked to from any source.

weight

A displayed value given to resulting answers of a text search. The value is equal to the sum of the weights (for indexed words) of all the matched words from the text search. Weight also refers to an internal value given to each indexed keyword for an answer or incident. The value is relative to a constant and is based on number of occurrences, capitalization, and location of the word (ranked high to low: Keywords, Summary, Question, and Answer field for answers; Subject field and incident thread for incidents).

widget

A collection of files that generates a specific function when it is placed on a page of the customer portal. Widgets can be buttons, fields, reports, or other elements that can access the B2C Service database and communicate with other widgets through events or to the server through AJAX requests.

widget builder

A tool that generates custom widget code, including placeholders to allow additional editing of the code. The widget builder, accessed on the Customer Portal Administration site, can extend an existing widget or create a new one.

Win/loss reason

An option for classifying and recording reasons for winning or losing an opportunity.

Wltool

A utility that is manually run after making changes to one of the wordlist files. See Wordlist file.

word stemming

A feature used in keyword indexing and text searching that finds the root of each word and stores the stemmed root instead of the whole word, thereby saving large amounts of space while making a search broader and more appropriate.

wordlist file

Any of the files that can be modified to customize indexing, text searching, and SmartSense emotive ratings. See File Manager.

workflow

See Desktop workflow.

workgroup

All of a record's open, associated records (for instance, an incident's contact, organization, and tasks) that are docked to the Service Console. All records in a workgroup are saved and closed in a single operation. When another non-associated record is opened, the records in the workgroup are collapsed on a single content pane tab.

working record

The record being evaluated or acted upon by a workflow element or connector. For instance, a workspace element can display the first or last record opened in the workflow or a record named elsewhere in the workflow. See Desktop workflow.

workspace

The configuration of the content pane when working with answers, contacts, incidents, opportunities, organizations, and tasks; when working in Chat; and when working with quotes, quote products, and service opportunities. Standard workspaces exist for each type of workspace, and custom workspaces can be created. The workspaces staff members use depend on the workspaces selected in their profile.

workspace rules

A type of rule used to dynamically adjust the display, behavior, and values of fields and controls on a workspace based on staff member actions. Each rule is triggered by one or more events and conditions.

workspace designer

The tool used to create and edit custom workspaces.

Your Account

A tab on the customer portal that opens the Account Overview page where customers can view and update all the questions they have previously submitted and view any answer or product/category notifications to which they are subscribed. They can also view their service contracts, edit their account information, and change their password. This component is restricted and requires a customer account.

