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Conversation Rules Templates Guide

Actions

Actions

Action	Example Usage	Parameters	Description
Update Customer Profile "{contactAttribute}" to "{stringValue}"	Update Customer Profile "City" to "Raleigh" Update Customer Profile "Country" to "USA"	contactAttribute <ul style="list-style-type: none"> • fetched from Business Attributes -> Contact Attributes stringValue <ul style="list-style-type: none"> • any string 	Allows rule to pass back a new value for one or more Customer Profile fields to the invoking application. The invoking application perform the update using "Update Customer Profile". The updated fields are returned in the following structure: <pre>"rule_results" : { "updated_fields" : "["City", "Raleigh", "Country", "USA"] }</pre>
Update Customer Profile (numeric) "{contactAttribute}" to {numericValue}	Update Customer Profile (numeric) "age" to 55 Update Customer Profile (numeric) "credit score" to 500	contactAttribute <ul style="list-style-type: none"> • fetched from Business Attributes -> Contact Attributes numericValue <ul style="list-style-type: none"> • any number 	Allows rule to pass back a new value for one or more Customer Profile fields to the invoking application. The invoking application perform the update using Update Customer Profile. The updated fields are returned in the following structure: <pre>"rule_results" : { "updated_fields" : "["age", 55, "credit score", 500] }</pre>
Request specific agent "{agent}"	Request specific agent "Fred Flintstone" Request specific agent "Betty Rubble"	agent <ul style="list-style-type: none"> • List of agents fetched from Configuration Server 	Allows rule to pass back a specific agent to the invoking application for processing. The requested agent is returned in the following structure: <pre>"rule_results" : { "requested_agent", "Betty Rubble" }</pre>
Request agent group	Request agent group	agentGroup	Allows rule to pass back

Action	Example Usage	Parameters	Description
"{agentGroup}"	<p>"Customer Retention"</p> <p>Request agent group "Widget Service"</p>	<ul style="list-style-type: none"> List of agent groups fetched from Configuration Server 	<p>a specific agent group to the invoking application for processing. The requested agent group is returned in the following structure:</p> <pre>"rule_results" : { "requested_agent_group", "Customer Retention" }</pre>
Request place group "{placeGroup}"	<p>Request place group "Widget Sales"</p> <p>Request place group "San Francisco Office"</p>	<p>placeGroup</p> <ul style="list-style-type: none"> List of place groups fetched from Configuration Server 	<p>Allows rule to pass back a specific place group to the invoking application for processing. The requested place group is returned in the following structure:</p> <pre>"rule_results" : { "requested_place_group", "Widget Sales" }</pre>
Request skill "{skill}"	<p>Request skill "Spanish"</p> <p>Request skill "Installations"</p>	<p>skill</p> <ul style="list-style-type: none"> List of skills fetched from Configuration Server 	<p>Allows rule to pass back a specifically requested skill to the invoking application for processing. The requested skill is returned in the following structure:</p> <pre>"rule_results" : { "requested_skill", "Spanish" }</pre>
Send communication to customer via "{mediaType}"	<p>Send communication to customer via "Email"</p> <p>Send communication to customer via "Voice"</p>		<p>Allows rule to pass back an indication that further communication with the customer is permissible. The result is returned in the following structure:</p> <pre>"rule_results" : { "send_communication", "Email" }</pre>
Block communication to customer	Block communication to customer		<p>Allows rule to pass back an indication that further communication with the customer should be blocked. The result is returned in the</p>

Action	Example Usage	Parameters	Description
			following structure: "rule_results" : { "block_communication", "true" }
Offer Service Resumption {offerToResume}	Offer Service Resumption "true" Offer Service Resumption "false" Note: The GUI will render a "checkbox" which can be checked or unchecked by the user	offerToResume • boolean value	Allows rule to pass back an indication that the customer should be offered an option to resume an open/existing service or not. "rule_results" : { "offer_resumption", "true" } or... "rule_results" : { "offer_resumption", "false" }
Offer Survey to Customer {offerToSurvey}	Offer Survey to Customer "true" Offer Survey to Customer "false" Note: The GUI will render a "checkbox" which can be checked or unchecked by the user	offerToSurvey • boolean value	Allows rule to pass back an indication that the customer should be offered a survey or not. "rule_results" : { "offer_survey", "true" } or... "rule_results" : { "offer_survey", "false" }

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