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Gplus Adapter 8.0 for Siebel CRM Deployment Guide

Sending Chat Transcript via Siebel-side Email

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Sending Chat Transcript via Siebel-side Email

Genesys Chat solution already provides the option to send a chat session transcript to a client by email. Chat Server automatically manages this task on request from the agent side (agent desktop) during chat session finalization.

By sending the Genesys Chat Transcript via the Siebel-side Email feature, the Adapter allows a chat session transcript to be sent to a client from the Siebel side. As a result, it allows you to edit email content before sending. Both Genesys Email and Siebel Email solutions can be used for this purpose. Siebel Email Templates are also supported.

In addition, this feature supports sending the transcript current chat session(s) for those chat sessions previously concluded.

Deployment notes

Configure Multimedia Component

This feature is a part of the Gplus Adapter for Siebel CRM Multimedia component. To enable it, you must perform new configuration steps in addition to those explained in the **“Multimedia Component: Updating the Siebel repository file”** procedure, under in the **“Configuring Siebel Using the Siebel Tools”** section in the **Chapter 8 “Deploying the Multimedia Component”** of the [Gplus Adapter 8.0 for Siebel CRM Deployment Guide](#).

When doing the **“Multimedia Component: Updating the Siebel repository file”** procedure, described in the **“Configuring Siebel Using the Siebel Tools”** section, do the following additional actions:

1. As part of *Step 8*, make two more copies of chosen Action-related Siebel business component named:
 - *GHistory Action Chat”
 - “GHistory Action Email”
- As part of **Step 21**, merge conflicts for the “GHistory Action Chat” and “GHistory Action Email” business components according to the following tables: **“GHistory Action Chat”** business component objects and resolutions

Object Type	Object Name	Resolution
BC Attribute	INACTIVE	File
BC Attribute	NO_DELETE	File
BC Attribute	NO_INSERT	File
BC Attribute	NO_MERGE	File

Object Type	Object Name	Resolution
BC Attribute	NO_UPDATE	File
BC Attribute	SCRIPTED	File
Server Script	(declarations)	File
Server Script	BusComp_PreGetFieldValue	File
Server Script	BusComp_PreQuery	File
Server Script	buildTranscript	File
Server Script	xGetChatActivityType	File
Server Script	xGetProfileOrConfigParam	File
Field	Primary Contact Email Address	File
Field	TranscriptAsHTML	File
Field	TranscriptAsText	File

“GHistory Action Email” business component objects and resolutions

Object Type	Object Name	Resolution
BC Attribute	INACTIVE	File
BC Attribute	NO_DELETE	File
BC Attribute	NO_INSERT	File
BC Attribute	NO_MERGE	File
BC Attribute	NO_UPDATE	File
BC Attribute	SCRIPTED	File
Server Script	(declarations)	File
Server Script	BusComp_PreGetFieldValue	File
Server Script	BusComp_PreQuery	File
Server Script	xGetInboundEmailActivityType	File
Server Script	xGetOutboundEmailActivityType	File
Server Script	xGetProfileOrConfigParam	File
Field	Calculated Email Body	File
Field	Calculated Email Type	File
Field	Primary Contact Email Address	File

- After the **Step 25**, do the next two steps:
 1. **Step 25a:** For the “GHistory Action Chat” business components, set the Force Active field attribute to the checked state (or true in the Property window) for the following field:
 - "Call Id"
 2. **Step 25b:** For the “GHistory Action Email” business components, set the Force Active field attribute to the checked state (or true in the Property window) for the following fields:
 - "Call Id"
 - "Parent Activity Id"

Customize Communication Applet

If you plan to use Siebel Email for sending chat session transcripts, perform the following customization of the **“Send Communication Applet”** vanilla Siebel applet that is used for outbound emails. This automatically fills in addresses, subject and body with a chat session data. To do so, use the following procedure.

1. Start Siebel Tools.
2. Navigate to the “Project” folder of the Object Explorer.
3. Lock the “Comm Manager” project.
4. Navigate to the “Applet” folder of the Object Explorer.
5. Select the Send **Communication Applet**.
6. Right-click the applet and select **Edit Server Scripts**.
7. Add the call of the GplusLoadPredefinedFields() function into the predefined WebApplet_Load() function, as shown in the example here:

```
function WebApplet_Load ()
{
    GplusLoadPredefinedFields();
}
```

8. Add the following GplusLoadPredefinedFields() function:

```
function GplusLoadPredefinedFields()
{
    var EMAIL_TEMPLATE_PARAM = "ChatTranscriptEmailTemplate";

    var id = TheApplication().GetSharedGlobal("GplusChat2Email_Id");
    if (id != null && id != "")
    {
        TheApplication().SetSharedGlobal("GplusChat2Email_Id","");

        var CHAT_BUSINESS_OBJECT = "GHistoryChat";
        var CHAT_BUSINESS_COMPONENT = "GHistory Action Chat";
        var svc = null;
        var ips = null;
        var ops = null;
        var bo = null;
        var bc = null;
        try
        {
            ips = TheApplication().NewPropertySet();
            ops = TheApplication().NewPropertySet();
            svc = TheApplication().GetService("MCR Activity manager");

            ips.SetValue(EMAIL_TEMPLATE_PARAM);
            svc.InvokeMethod("GetProfileOrConfigParam",ips,ops);
            var emailTemplate = ops.GetValue();

            if (emailTemplate != null && emailTemplate != "" &&
emailTemplate != "CHANGE_ME")
            {
                ips.Reset();
            }
        }
    }
}
```

```
ops.Reset();
svc = TheApplication().GetService("Outbound Communications Manager");
ips.SetProperty("CommTemplateName", emailTemplate);
ips.SetProperty("SourceBusObj", CHAT_BUSINESS_OBJECT);
ips.SetProperty("SourceId", id);
try
{
    svc.InvokeMethod("ExpandCommTemplate", ips, ops);
}
catch(e)
{
    ops.SetProperty("ExpandedSubject","");
    ops.SetProperty("ExpandedText","Failed to expand Email Template
"+emailTemplate+"");
    ops.SetProperty("HTMLExpandedText","Failed to expand Email Template
"+emailTemplate+"");
}
var body = ops.GetProperty("ExpandedText");
if (body==null || body=="")
    body = ops.GetProperty("HTMLExpandedText");

BusComp().SetFieldValue("Description",ops.GetProperty("ExpandedSubject"));
BusComp().SetFieldValue("Display Email Body",body);
BusComp().WriteRecord();
}
else
{
    bo = TheApplication().GetBusObject(CHAT_BUSINESS_OBJECT);
    bc = bo.GetBusComp(CHAT_BUSINESS_COMPONENT);
    bc.ClearToQuery();
    bc.SetSearchSpec("Id",id);
    bc.ExecuteQuery(ForwardOnly);
    if (bc.FirstRecord())
    {
        BusComp().SetFieldValue("Description",bc.GetFieldValue("Description"));
        BusComp().SetFieldValue("Display Email
Body",bc.GetFieldValue("TranscriptAsText"));
        BusComp().WriteRecord();
    }
}
}
catch(ex)
{
}
finally
{
    svc = null;
    ips = null;
    ops = null;
    bc = null;
    bo = null;
}
}
```

9. Save changes to the applet.

Configuring the Siebel Email Template for chat transcript sending

This section describes how to configure the Siebel Email Template to form an outbound email with a

chat session transcript. If the Template is not configured, outbound email will be created with a chat session transcript only.

Note: The Siebel Email Template is applicable to both Siebel Email and Genesys Email.

To configure Email Template to be used for sending chat session transcript, use the following procedure.

1. Navigate to **Site Map > Administration - Communications > All Templates.**
 2. Create a new record with the following parameters:
 - Name: <TemplateName> (any you wish, for example, "Gplus Chat Transcript Text Template")
 - Channel Type: email
 - Status: active
 - Language: <your language>
 - Locale: <your locale>
 - Description: <your description>
- Complete the template using "GHistoryChat" as the Object parameter value. The figure here provides an example.

The screenshot displays the Siebel Email Template configuration window. It is divided into two main sections: 'Template Properties' and 'Compose Template'.

Template Properties:

- Name:** Gplus Chat Transcript Te
- Channel Type:** Email
- Template Type:** Body
- Language:** ENU
- Locale:** ENU
- HTML Template:** ☒
- Public:** ☒
- Pick Available Substitutions:** Object: GHistoryChat. Available Substitutions list includes: [GHistory Action Chat.ACD Call Duration], [GHistory Action Chat.Abstract], [GHistory Action Chat.Account Currency Code], [GHistory Action Chat.Description], [GHistory Action Chat.Primary Contact First Name], [GHistory Action Chat.Primary Contact Last Name], [GHistory Action Chat.TranscriptAsHTML], [GHistory Action Chat.TranscriptAsText].

Compose Template:

- Subject:** Chat session transcript; chat subject [GHistory Action Chat.Description]
- Text:**
Dear [GHistory Action Chat.Primary Contact First Name] [GHistory Action Chat.Primary Contact Last Name],

Chat conversation from [GHistory Action Chat.Started]:

Subject: [GHistory Action Chat.Description]

Transcript:

[GHistory Action Chat.TranscriptAsHTML]

Best Regards,

Figure 1: Siebel Email Template example.

The Special Chat session related fields are:

- [GHistory Action Chat.Description]: chat session subject
- [GHistory Action Chat.Primary Contact First Name]: client's first name
- [GHistory Action Chat.Primary Contact Last Name]: client's last name
- [GHistory Action Chat.TranscriptAsHTML]: chat session transcript in HTML format
- [GHistory Action Chat.TranscriptAsText]: chat session transcript in text format

- [GHistory Action Chat.Started]: Date and time when session was started
- [GHistory Action Chat.Due]: Date and time when session was finished
- Navigate to Site Map > Administration - Communications > All Configurations.
- Select the required configuration. If no configuration is created, create it as described in the “Multimedia Component: Creating a customized configuration file” procedure, section “Configuring Siebel Using the Siebel Web Client”.
- Set the “ChatTranscriptEmailTemplate” configuration parameter with <TemplateName> from the Step #2.