

Pega Customer Service Developer Training

Course Description:

This comprehensive course prepares you to build and deploy Pega Customer Service™ applications using low-code development techniques. You will gain hands-on experience with Pega Customer Service Foundation, Constellation architecture, Pega Call™, Pega Common Data Model, Digital Messaging, and Voice AI. The course covers key functionalities like case management, service requests, business conditions, customer verification, and agent guidance. You will also learn about best practices, troubleshooting, and performance considerations for Pega Customer Service applications. This course emphasizes practical application through hands-on challenges and real-world scenarios.

Audience Profile:

This course is designed for developers, system architects, and business analysts who are involved in building and implementing Pega Customer Service applications. It is ideal for those looking to gain expertise in configuring and customizing Pega Customer Service solutions to meet specific business needs.

Prerequisites:

- Basic understanding of Pega Platform™ concepts.
- Familiarity with application development principles.
- Recommended: Completion of Pega Academy's "Pega Customer Service Foundation" mission.

Course Objectives:

Upon completion of this course, participants will be able to:

- Build and customize Pega Customer Service applications.
- Implement Pega's Constellation design pattern for a modern user experience.
- Configure and manage service requests, cases, and business conditions.
- Integrate Pega Call™ with CTI systems for seamless customer interactions.
- Understand and utilize the Pega Common Data Model.
- Implement customer verification and agent guidance features.
- Utilize Pega Digital Messaging to connect with customers across various digital channels.
- Leverage Pega Voice AI to assist agents during live phone interactions.
- Apply best practices for Pega Customer Service development.
- Troubleshoot common issues in Pega Customer Service applications.
- Optimize Pega Customer Service applications for performance.

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Module 1: Customer Service Low-Code Developer

- Pega Customer Service Foundation
- Constellation Adoption
- Pega Constellation View-Based UI for Designers
- Modifying Customer Composites
- Updating the Customer Composite (Challenge)
- Case Management
- Service Requests
- Creating a New Service Request (Challenge)
- Business Conditions
- Configuring Business Conditions (Challenge)
- Using Pega Customer Decision Hub in Pega Customer Service
- Presenting Suggestions for Agents
- Suggesting an Open Complaint Case (Challenge)
- Configuring Customer Verification
- Configuring Customer Verification (Challenge)
- Guiding a Customer Service Agent with Dialogs
- Updating a Dialog (Challenge)
- Email Bots for Pega Customer Service
- Pega Knowledge

Module 2: Pega Call

- Pega Call Introduction
- Configuring a CTI Link
- User Device Capabilities
- Call Treatment Settings
- Call Transfers
- Screen Pops

Module 3: Pega Common Data Model

- Common Data Model Overview
- Data Integration and Designer
- Adding a Property to an Existing Entity (Challenge)
- Entities and Their Relationships
- Design Patterns
- Storage Options

Module 4: Coexistence in Pega Customer Service

- Pega Process Fabric Hub Basics
- Coexistence in Pega Customer Service Using Pega Process Fabric Hub
- Establishing Coexistence Between Pega Customer Service UI-Kit and Constellation Applications
- Processing a Pega Customer Service UI-Kit Case in Constellation with Coexistence

Module 5: Pega Customer Service Performance Considerations

(Details not provided in the source material. This module would likely cover topics like optimization techniques, performance testing, and best practices for efficient application design.)

Module 6: Pega Customer Service Best Practices

- App Studio Development
- Interaction Cases and Service Cases

Module 7: Customer Service for Constellation Troubleshooting

- Troubleshooting Interaction Portal Issues
- Troubleshooting Customer Interaction Issues
- Troubleshooting Task Categories
- Troubleshooting DX Components
- Troubleshooting Tips for Customer Service for Constellation

Module 8: Pega Digital Messaging

- Getting Started with Digital Messaging
- Configuring Digital Messaging Manager
- Creating a Digital Messaging Channel Interface (Challenge)
- Setting Up an Agent Trainer
- Interacting with Customers Using a Chatbot

- Configuring a Chatbot with Web Messaging (Challenge)
- Authenticating Customers Using Digital Messaging
- Configuring Chat Queues and Routing
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- Setting Chat and Messaging Behavior
- Configuring Common Phrases for Agents
- Configuring Common Phrases for Agents (Challenge)
- Setting Up Messaging AI
- Configuring a Case Suggestion (Challenge)
- Configuring a Knowledge Article Suggestion (Challenge)
- Configure Suggestions and AI Features
- Sending Knowledge Articles
- Setting Up Co-Browse

Module 9: Pega Voice AI

- Pega Voice AI Introduction
- Voice AI Components
- Suggested Cases
- Suggested Knowledge
- Form Autofill
- Script Adherence
- Managing Customer Interactions
- Working with Voice AI Models