

# Pega Customer Service Unity Pack

Release Notes Version 7.22

April 2017

## Product Overview

*Pega Customer Service Unity Pack*, a framework built on Pega Customer Service, will provide the necessary product enhancements and patches to enable the transition from Chordiant Foundation Server (CFS) to Pega Customer Service. It also consists of a sample implementation of Pega Customer Service to demonstrate the transition of a CFS based implementation.

Pega Customer Service is built on the Pega 7 Platform and lets you better engage your customers, simplify your customer service representative (CSR) experience, and change as your business evolves. Unlike alternatives, which depend on people to interpret data and take action, Pega Customer Service anticipates customer needs, provides guidance, and automates processes to deliver a satisfying, efficient, and accurate service experience for your connected customers. Pega Customer Service provides many benefits, including the ability to:

- Increase customer satisfaction
- Make employees more productive
- Deploy rapidly and adapt continuously

## Transition from Chordiant Foundation Server

To ensure customers have a fast and safe transition to Pega Customer Service and leverage existing Chordiant Foundation Server investments (rather than doing a big-bang replacement), Pega suggests a four-phase approach to adopt and transition your existing Chordiant Foundation Service implementation to Pega Customer Service:

- Phase 1: Prepare Interaction Portal
- Phase 2: Mash up / Launch Existing Customer Service Processes
- Phase 3: Rebuild Customer Service Processes
- Phase 4: Shutdown CFS Implementation

Below is a brief overview of the phases.

Ensure to apply the corresponding version specific IE11 Enterprise Mode patch on Chordiant Foundation Server implementation before starting the phases.

## Phase 1: Prepare Interaction Portal

In this phase, Pega Customer Service application will be configured to let existing users login and access Business Data related to Customer and Accounts from their existing data repositories or services. Computer Telephony Integration (CTI) is also set up and configured on the Pega Customer Service application.

The following screenshot shows a 360° view of a Customer where data is fetched directly from existing data sources and mapped to screens in Pega Customer Service.

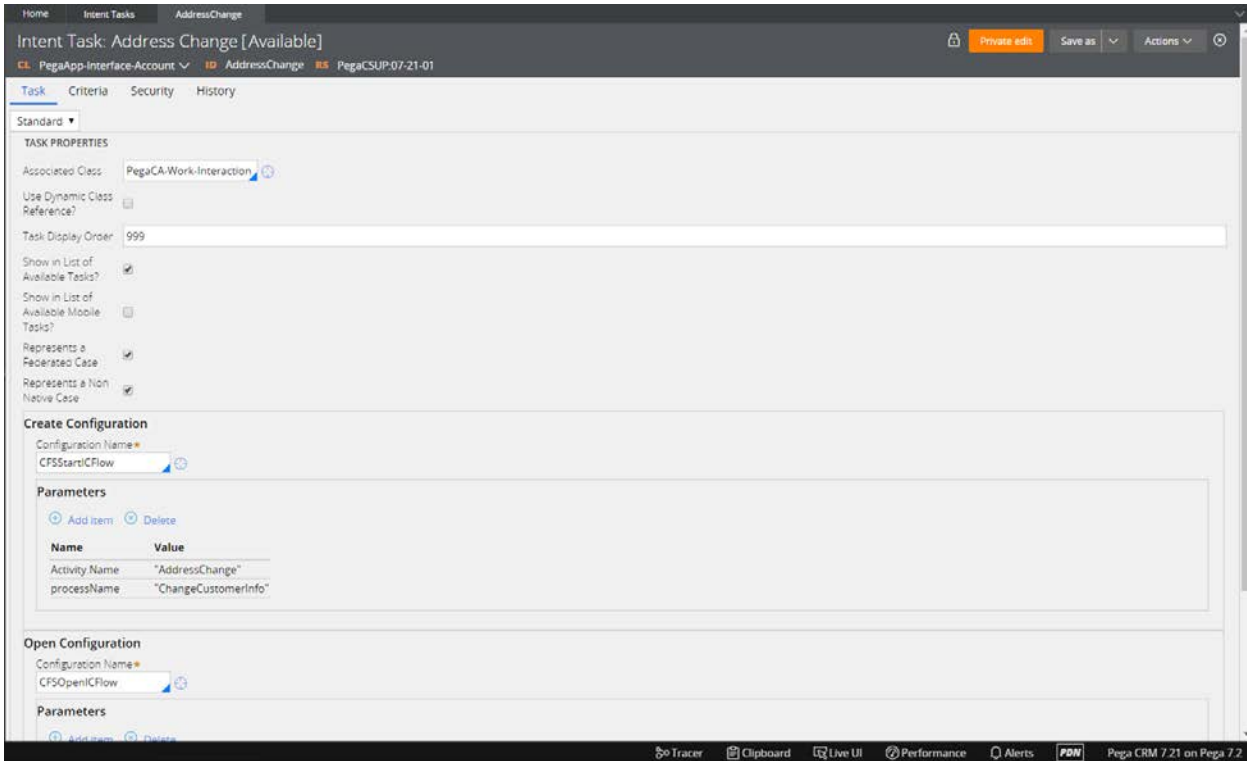
The screenshot displays the Pega Customer Service interface for a customer named Thomas P. Martin. The interface is divided into several sections:

- Customer Details:** Birth date (Jan 14, 1949), Employee (Internet Central Ventures), Primary email (paulmartin@zapinternet.com), and Occupation (Engineer).
- Work Address:** Address line 1 (123 Memory Lane), City (San Jose), Country (US).
- Home address:** Address line 1 (105, 2nd Main), City (Johannesburg), State Province (Gauteng), Country (ZA), and PO BOX No. (90876).
- Customer account summary:** A table listing accounts with columns for Account, Type, Status, Balance, Next stmt, and Min Payment.
- Recent cases:** A list of cases including 'ICTransfer:ChangeCustomerInfo' and 'AddressChange'.
- Recent interactions:** A list of interactions including 'Not yet determined'.
- Recent marketing engagements:** A section for marketing preferences.

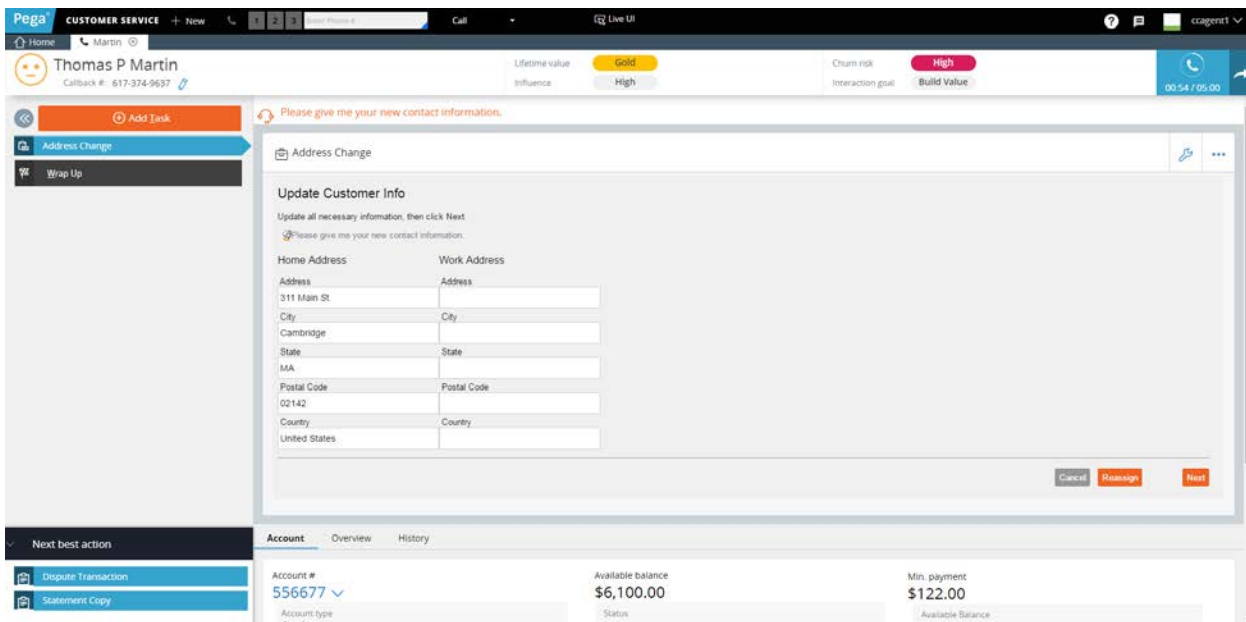
Account	Type	Status	Balance	Next stmt	Min Payment
556677	Checking	Active	\$6,100.00	Feb 6, 1996	\$122.00
10000000000...	Credit Card	Active	\$8,888.00	Apr 13, 2015	\$177.76

## Phase 2: Mash up / Launch Existing Customer Service Processes

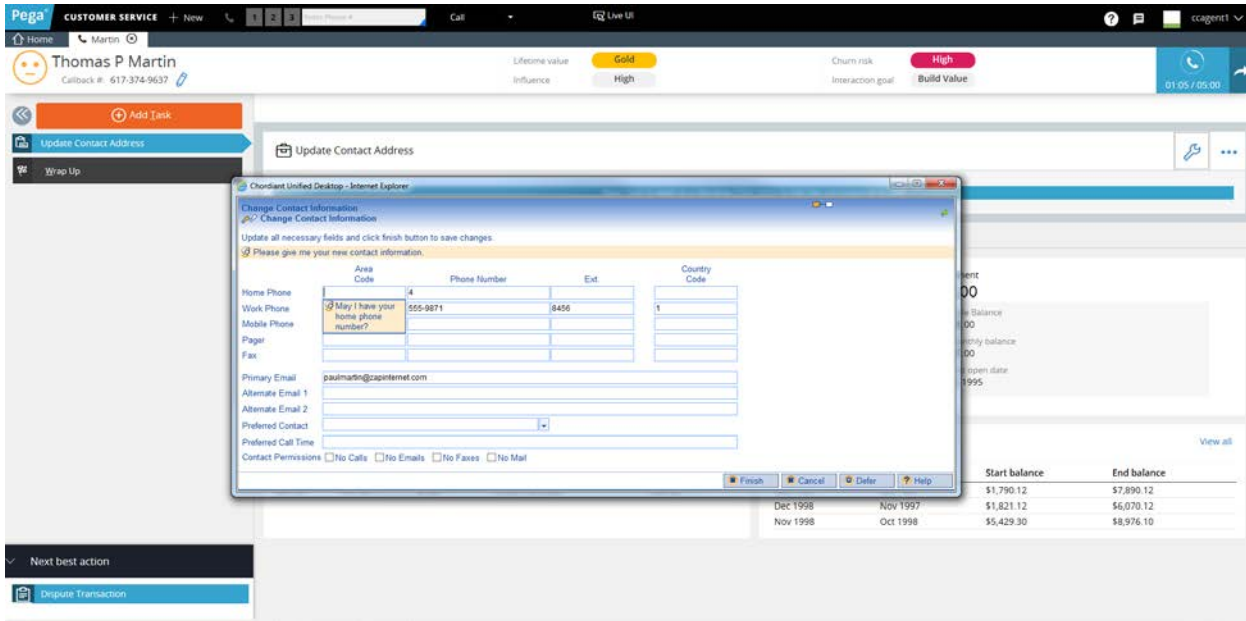
Pega Customer Service has been enhanced to allow the launch of external applications (Non-Native Case) which are not based on the Pega 7 Platform. Developers could make use of CFS Import Offerings Wizard tool to create Intent Task(s) in customer service for the selective offerings of CFS as shown in the below screen shot.



If an Intent Task is configured for JSF UI screens, it would Mash-Up within the same window as shown in following screenshot.



However, legacy CAFE UI screens and JSF 1.x UI, which work only on IE 11 Enterprise Mode, will look different; they will only be launched in a separate window.



### Phase 3: Rebuild Customer Service Processes

In this phase, you continue to build new Service Processes natively in Pega Customer Service. However, you will also iteratively rebuild your existing Service Processes natively and gradually reduce the Mash up content.

### Phase 4: Shutdown CFS Implementation

When you are done with rebuilding all of the existing Customer Service Processes natively in Pega Customer Service, you could shut down your existing CFS system.

## What's New in this Release

The below are some of the Key points for current release of PegaCSUP

- Extend the support for Next Best Action for Non Native Intent Tasks
- A framework for applying CSEndUser skin of PegaCS for Non Native Intent Tasks
- PegaCHAT dialogs support for CAFE and IC flows in popup mode. The dialogs are rendered dynamically in Pega CHAT Text window when navigating Intent tasks
- PegaCALL work transfer support for IC based Non Native Intent tasks
- An utility, to support for associating multiple portals based on the user roles defined in CFS and mapping to corresponding access groups in Pega
- Support for capturing the CFS legacy customer history in PegaCS Portal

## Documentation

The documents included with this release are:

- PegaCSUP\_722\_Installation Guide
  - This document describes the certified tech stack details and installation and configuration of PegaCSUP (Pega Customer Service Unity Pack).
- PegaCSUP\_722\_Implementation Guide
  - This document describes design, structure and processing elements in PegaCSUP. This document also explains in details on configuration, customizations and how to deploy the application that are ready for you to use.

## Known Issues/Limitations

- Recovery of IC flows when the browser crashes in middle when the process is in progress as an Intent Task is not supported
- CAFE Flows Mashup not supported as the FS OOTB components and client side Javascript is not cross domain compliance. Hence CAFE flows can only be opened in a new window as an Intent Task.
- BUG-216167- IllegalStateException on server console while accessing IC flows with JSF 2.1 configuration.
- JSF Support for IC flows
  - a. JSF1.x – Will always be launched on a new window
  - b. JSF2.1 – Will Mashup or launched on a new window in PegaCS portal

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