

# **Sterling Commerce**

*An IBM Company*

## **Sterling Call Center and Sterling Store: Upgrade Guide**

Release 8.5

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# Preface

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This manual explains how to upgrade from Release 7.4, or above, to Release 8.5.

## Intended Audience

This manual provides assistance to System Administrators, Database Administrators, and implementation personnel when upgrading from Release 7.4, or above, to Release 8.5.

## Structure

This document contains the following sections:

### **Chapter 1, "Performing a Migration Assessment"**

This chapter examines differences in Sterling Call Center and Sterling Store between Release 7.4, Release 7.5, and Release 8.5.

### **Chapter 2, "Upgrading to Release 8.5"**

This chapter describes the sequence of procedures you must follow to upgrade from Release 7.4, Release 7.5 to Release 8.5.

## Documentation

For more information about the Sterling Call Center™ and Sterling Store™ components, see the following manuals:

- *Sterling Call Center and Sterling Store: Release Notes*
- *Sterling Call Center and Sterling Store: Installation Guide*
- *Sterling Call Center and Sterling Store: Concepts*

- *Sterling Call Center and Sterling Store: Implementation Guide*
- *Sterling Call Center and Sterling Store: User Guide*
- *Sterling Call Center and Sterling Store: Upgrade Guide*
- *Sterling Call Center and Sterling Store: Business Intelligence Guide*
- *Sterling Call Center and Sterling Store: Javadocs*

For more information about the Selling and Fulfillment Foundation components, see the following manuals:

- *Selling and Fulfillment Foundation: Release Notes*
- *Selling and Fulfillment Foundation: Installation Guide*
- *Selling and Fulfillment Foundation: Upgrade Guide*
- *Selling and Fulfillment Foundation: Configuration Deployment Tool Guide*
- *Selling and Fulfillment Foundation: Performance Management Guide*
- *Selling and Fulfillment Foundation: High Availability Guide*
- *Selling and Fulfillment Foundation: System Management Guide*
- *Selling and Fulfillment Foundation: Localization Guide*
- *Selling and Fulfillment Foundation: Customization Basics Guide*
- *Selling and Fulfillment Foundation: Customizing APIs Guide*
- *Selling and Fulfillment Foundation: Customizing Console JSP Interface for End User Guide*
- *Selling and Fulfillment Foundation: Customizing the RCP Interface Guide*
- *Selling and Fulfillment Foundation: Customizing User Interfaces for Mobile Devices Guide*
- *Selling and Fulfillment Foundation: Customizing Web UI Framework Guide*
- *Selling and Fulfillment Foundation: Customizing Swing Interface Guide*
- *Selling and Fulfillment Foundation: Extending the Condition Builder Guide*

- *Selling and Fulfillment Foundation: Extending the Database Guide*
- *Selling and Fulfillment Foundation: Extending Transactions Guide*
- *Selling and Fulfillment Foundation: Using Sterling RCP Extensibility Tool Guide*
- *Selling and Fulfillment Foundation: Integration Guide*
- *Selling and Fulfillment Foundation: Product Concepts Guide*
- *Sterling Warehouse Management™ System: Concepts Guide*
- *Selling and Fulfillment Foundation: Application Platform Configuration Guide*
- *Sterling Distributed Order Management™: Configuration Guide*
- *Sterling Supply Collaboration: Configuration Guide*
- *Sterling Global Inventory Visibility™: Configuration Guide*
- *Sterling Catalog Management™: Configuration Guide*
- *Sterling Logistics Management: Configuration Guide*
- *Sterling Reverse Logistics™: Configuration Guide*
- *Sterling Warehouse Management System: Configuration Guide*
- *Selling and Fulfillment Foundation: Application Platform User Guide*
- *Sterling Distributed Order Management: User Guide*
- *Sterling Supply Collaboration: User Guide*
- *Sterling Global Inventory Visibility: User Guide*
- *Sterling Logistics Management: User Guide*
- *Sterling Reverse Logistics: User Guide*
- *Sterling Warehouse Management System: User Guide*
- *Selling and Fulfillment Foundation: Mobile Application User Guide*
- *Selling and Fulfillment Foundation: Business Intelligence Guide*
- *Selling and Fulfillment Foundation: Javadocs*
- *Sterling Selling and Fulfillment Suite: Glossary*
- *Parcel Carrier: Adapter Guide*

- *Selling and Fulfillment Foundation: Multitenant Enterprise Guide*
- *Selling and Fulfillment Foundation: Password Policy Management Guide*
- *Selling and Fulfillment Foundation: Properties Guide*
- *Selling and Fulfillment Foundation: Item Concepts Guide*
- *Selling and Fulfillment Foundation: Pricing Concepts Guide*
- *Business Center: Item Administration Guide*
- *Business Center: Pricing Administration Guide*
- *Business Center: Customization Guide*
- *Business Center: Localization Guide*

For a description of the various documents in the Sterling Call Center and Sterling Store documentation set, see the Sterling Call Center and Sterling Store documentation home page at:

`<INSTALL_DIR>/documentation/YCD_doc_home.html`

`<INSTALL_DIR>` is the directory where Sterling Call Center and Sterling Store and the Selling and Fulfillment Foundation are installed.

## Conventions

The following conventions may be used in this manual:

| Convention       | Meaning  |
|------------------|--|
| ...              | Ellipsis represents information that has been omitted.   |
| < >              | Angle brackets indicate user-supplied input.   |
| mono-spaced text | Mono-spaced text indicates a file name, directory path, attribute name, or an inline code example or command.  |
| / or \           | Slashes and backslashes are file separators for Windows, UNIX, and Linux operating systems. The file separator for the Windows operating system is "\" and the file separator for UNIX and Linux systems is "/". The UNIX convention is used unless otherwise mentioned. |
| <INSTALL_DIR>    | User-supplied location of the Selling and Fulfillment Foundation installation directory and Sterling Call Center and Sterling Store installation directory. This is only applicable for Release 8.0.   |

| Convention       | Meaning  |
|------------------|--|
| <ANALYTICS_HOME> | User-supplied location of the Sterling Call Center and Sterling Store: Business Intelligence installation directory.<br><b>Note:</b> This convention is used only in the <i>Sterling Call Center and Sterling Store: Business Intelligence Guide</i> . |
| <COGNOS_HOME>    | User-supplied location of the Cognos installation directory.<br><b>Note:</b> This convention is used only in the <i>Sterling Call Center and Sterling Store: Business Intelligence Guide</i> .   |

**Notes:** The Sterling Call Center and Sterling Store documentation set uses the following conventions in the context of the product name:

- Sterling Customer Order Management PCA is used for Release 7.5 and earlier.
- Sterling Call Center and Sterling Store is used for Release 8.0.

The Selling and Fulfillment Foundation documentation set uses the following conventions in the context of the product name:

- Yantra is used for Release 7.7 and earlier.
- Sterling Supply Chain Applications is used for Releases 7.9 and 7.11.
- Sterling Multi-Channel Fulfillment Solution is used for Releases 8.0 and 8.2.
- Selling and Fulfillment Foundation for Release 8.5.



# Performing a Migration Assessment

This chapter explains the changes in Sterling Customer Order Management PCA from Release 7.4, Release 7.5 or Release 8.0 to Sterling Call Center and Sterling Store, Release 8.5. Read this chapter to assess the changes required to upgrade to Sterling Call Center and Sterling Store, Release 8.5, then follow the steps for the upgrade process as described in [Chapter 2, "Upgrading to Release 8.5"](#).

[Table 1–1](#) describes the upgrade paths available from Release 7.4, Release 7.5 or Release 8.0 to Release 8.5.

**Table 1–1 Upgrade Paths to Release 8.5**

| From  |   | To  |  | Path Followed   |   |
|---|---|---|--|---|---|
| <b>Sterling Supply Chain Applications Version</b> | <b>Sterling Customer Order Management PCA Version</b> | <b>Selling and Fulfillment Foundation Version</b> | <b>Sterling Call Center and Sterling Store Version</b> | <b>Sterling Supply Chain Applications /Selling and Fulfillment Foundation Version</b> | <b>Sterling Customer Order Management PCA/Sterling Call Center and Sterling Store Version</b> |
| 7.9   | 7.4   | 8.5   | 8.5  | 7.9 -> 8.5  | 7.4 -> 8.5  |
| 7.11  | 7.4   | 8.5   | 8.5  | 7.11 -> 8.5   | 7.4 -> 8.5  |
| 7.11  | 7.5   | 8.5   | 8.5  | 7.11 -> 8.5   | 7.5 -> 8.5  |
| 8.0   | 8.0   | 8.5   | 8.5  | 8.0 -> 8.5  | 8.0 -> 8.5  |

## 1.1 Upgrading to the Selling and Fulfillment Foundation, Release 8.5

Before upgrading to Sterling Call Center and Sterling Store, Release 8.5, ensure that you have upgraded to the Selling and Fulfillment Foundation, Release 8.5 and installed the latest hot fix. The Selling and Fulfillment Foundation, Release 8.5 upgrade also performs the following upgrade tasks for Sterling Call Center and Sterling Store:

- Alters the schema
- Copies the current customizations
- Migration and installation of older PCA version using `installPCAs` task

For more information about upgrading to Selling and Fulfillment Foundation, Release 8.5, see the *Selling and Fulfillment Foundation: Upgrade Guide*.

## 1.2 System Requirements

The system requirements for upgrading to Sterling Call Center and Sterling Store, Release 8.5 are the same as that for upgrading to Selling and Fulfillment Foundation, Release 8.5. For more information about the system requirements, see the *Selling and Fulfillment Foundation: Upgrade Guide*.

## 1.3 Important Behavior Changes

This section describes, in detail, the various behavior changes in Sterling Call Center and Sterling Store, Release 8.5.

### 1.3.1 Important Behavior Changes between Release 7.4 and Release 7.5

This section describes, in detail, the various behavior changes between Sterling Customer Order Management PCA, Release 7.4 and Release 7.5.



### 1.3.1.1 Sterling Customer Order Management PCA User Interface

There are new user interface (UI) features that are introduced in the Sterling Customer Order Management PCA, Release 7.5. This section explains only the features that impact your UI due to migration. For more information about all new features introduced in the Sterling Customer Order Management PCA, Release 7.5, see the *Sterling Call Center and Sterling Store: Release Notes* and the *Sterling Call Center and Sterling Store: User Guide*.

The following features are enhanced:

- [Support for Provided Services](#)
- [Order Line Level Hold Visibility and Resolution](#)
- [Delivery-Related Changes](#)
- [Appointment Calendar View Enhancements](#)
- [Quick Access Screen Changes](#)

#### 1.3.1.1.1 Support for Provided Services

With the exception of the following screens, all screens of the Sterling Customer Order Management PCA are enhanced to handle provided service items:

- Initiate Return screens
- Create Store Return screens

#### How It Affects You

None.

#### Migration Strategy

None.

#### 1.3.1.1.2 Order Line Level Hold Visibility and Resolution

Two new columns are added to the View/Remove Holds screen.

#### How It Affects You

None.

### **Migration Strategy**

None.

#### **1.3.1.1.3 Delivery-Related Changes**

In the Multi-Line Add Line screen, a radio button is added to display Delivery as a fulfillment method.

### **How It Affects You**

None.

### **Migration Strategy**

None.

#### **1.3.1.1.4 Appointment Calendar View Enhancements**

The Appointment Calendar View screen is enhanced to provide visibility into appointment availability either by days or by slots. Additionally, based on the configuration, users can view the appointment calendar on either a weekly or monthly basis.

### **How It Affects You**

None.

### **Migration Strategy**

None.

#### **1.3.1.1.5 Quick Access Screen Changes**

In the Quick Access screen, under the Item Search panel, the Description field has been added.

### **How It Affects You**

None.

### **Migration Strategy**

None.

### 1.3.1.2 Channel Applications Manager

The following change is made to the Channel Applications Manager between Release 7.4 and Release 7.5.

- Related Item Display Configuration

#### 1.3.1.2.1 Related Item Display Configuration

In previous releases, the Order Entry screen displayed the related item information in a panel. In Release 7.5, the Order Entry screen displays the related item information in a popup window.

#### How It Affects You

If you have already changed the configurations for order entry rules in Release 7.4, the new behavior does not affect you. Otherwise, the related item information displays in a pop-up window after performing the migration.

#### Migration Strategy

If you want the Order Entry screen to display the related item information in a panel, you must re-configure the order entry rules. For more information about configuring the order entry rules, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

## 1.3.2 Important Behavior Changes between Release 7.5 and Release 8.0

This section describes, in detail, the various behavior changes between Sterling Customer Order Management PCA, Release 7.5 and Sterling Call Center and Sterling Store, Release 8.0.

### 1.3.2.1 Sterling Call Center and Sterling Store User Interface

There are new user interface (UI) features that are introduced in Sterling Call Center and Sterling Store, Release 8.0. This section explains only the features that impact your UI due to migration. For more information about all new features introduced in Sterling Call Center and Sterling Store, Release 8.0, see the *Sterling Call Center and Sterling Store: Release Notes* and the *Sterling Call Center and Sterling Store: User Guide*.

The following features are enhanced:

- [Return Enhancements](#)
- [Enhanced Price Match](#)
- [Order Search Screen](#)
- [Alert Search Screen](#)
- [Item Search Screen](#)
- [Order Payment Details Screen](#)
- [Delivery Fulfillment Summary](#)
- [Add Lines To Order](#)
- [Item Details Screen](#)
- [Select Enterprise Pop-Up](#)
- [Add Item to Order](#)
- [Quick Access Screen](#)

### **1.3.2.1.1 Return Enhancements**

The following return tasks have been replaced by a new task:

- Initiate Return
- Create Store return

#### **How It Affects You**

These tasks are no longer available in the COM UI.

#### **Migration Strategy**

A new task "Create Return" is created. The customizations done on the above removed tasks should be applied on this new task.

### **1.3.2.1.2 Enhanced Price Match**

The existing screens of Price Match have been replaced with new screens.

#### **How It Affects You**

If there are any customizations done to the old screens, they will be lost.

## Migration Strategy

The customizations done on the old screen should be applied on the new screens.

### 1.3.2.1.3 Order Search Screen

The loading of records in the existing Order Search screen has been changed. The old strategy was lazy loading where a part of the records is loaded first and the remaining is loaded later. Now, records are fetched by pages on demand.

The Order Search screen has been changed to enable users to search for orders using the View History Orders and View Recent Orders links. In previous releases, users had to search for orders using the Open, Recent, History, and All radio buttons. Additionally, in Release 8.0, the Reset button on the Order Search screen is hidden.

### How It Affects You

For more information about pagination, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

## Migration Strategy

The page size needs to be set as a property in the `yfs.properties` file. Also, there have been some layout changes to the search screens in Release 8.0. You may need to adjust any UI extensions to these screens after upgrading. You must apply extensions if you want to use the Reset button.

### 1.3.2.1.4 Alert Search Screen

The loading of records in the existing Alert Search screen has been changed. The old strategy was lazy loading where a part of the records is loaded first and the remaining is loaded later. Now, records are fetched by pages on demand.

Additionally, in Release 8.0, the Reset button on the Alert Search screen is hidden.

### How It Affects You

For more information about pagination, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

### Migration Strategy

The page size needs to be set as a property in the `yfs.properties` file. Also, there have been some layout changes to the search screens in Release 8.0. You may need to adjust any UI extensions to these screens after upgrading. You must apply extensions if you want to use the Reset button.

#### 1.3.2.1.5 Item Search Screen

The loading of records in the existing Item Search screen has been changed. The old strategy was lazy loading where a part of the records is loaded first and the remaining is loaded later. Now, records are fetched by pages on demand. Additionally, in Release 8.0, the Reset button on the Item Search screen is hidden.

In Release 8.0, the Item Search screen has been changed to enable users to search for both product and service items. The default behavior allows users to search for both product and service items. In previous releases, users could search for either product or service items, and the default behavior allowed users to search for product items.

### How It Affects You

For more information about pagination, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

### Migration Strategy

The page size needs to be set as a property in the `yfs.properties` file. Also, there have been some layout changes to the search screens in Release 8.0. You may need to adjust any UI extensions to these screens after upgrading. You must apply extensions if you want to use the Reset button.

#### 1.3.2.1.6 Order Payment Details Screen

The existing Order Payment Details screen has been replaced with a new screen.

### How It Affects You

If you had applied any customizations to the old screen, they will be lost.

## Migration Strategy

You must re-apply the customizations for the old screen to the new screens.

### 1.3.2.1.7 Delivery Fulfillment Summary

The existing appointment screen is replaced with the following screens:

- Appointment screen
- Appointment Summary

The appointment screen enables you to change the appointment and the appointment summary page provides a summary of all the appointments for the order.

The flow of the tasks involving appointment screen has been modified. The wizard definition for these tasks has been modified.

## How It Affects You

If there are any customizations done to the old appointment pages or any customizations done to the wizard definition files for the tasks involving the old appointment screens, they will be lost.

## Migration Strategy

The customizations done on the old screen should be applied on the new screens.

### 1.3.2.1.8 Add Lines To Order

The navigation panel in this task is replaced by a new panel containing bread crumbs.

## How It Affects You

If there are any customizations done to the old navigation panel, they will be lost.

## Migration Strategy

The customizations done on the old navigation panel should be applied on the new bread crumb panel.

### 1.3.2.1.9 Item Details Screen

On the Item Details screen, the Back to Item Search button has been replaced by a Close button. In previous releases, clicking the Back to Item Search button displays the Item Search screen without closing the Item Details screen. In Release 8.0, clicking the Close button closes the Item Details screen. Additionally, in Release 8.0, clicking the Add to Order button or the Create Order button closes the Item Details screen.

#### How It Affects You

None.

#### Migration Strategy

None.

### 1.3.2.1.10 Select Enterprise Pop-Up

In Sterling Call Center, when you click the Create Order button, the enterprise description displays in the Enterprise drop-down list on the Select Enterprise pop-up. In previous releases, the Enterprise drop-down list displayed the Enterprise Code.

#### How It Affects You

None.

#### Migration Strategy

None.

### 1.3.2.1.11 Add Item to Order

In Release 8.0, the Add Item to Order related task has been deprecated. An enhanced Add Lines to Order related task has been provided.

#### How It Affects You

If you had applied any customizations to the Add Item to Order task or the wizard definition files for this task, they will be lost.



## Migration Strategy

You must remove permissions for the Add Item to Order related task, and provide permissions for the enhanced Add Lines to Order related task.

### 1.3.2.1.12 Quick Access Screen

The Quick Access Screen has been enhanced to support pagination when searching for orders and items. The screen has been modified to use the commands from the Order Search Wizard and the Item Search Wizard to retrieve order details and item details.

## How It Affects You

If you have customized the commands for retrieving order details and item details on the Quick Access Screen, these customized commands will not be available.

## Migration Strategy

You must apply the customizations to the commands being called from the Order Search Wizard and the Item Search Wizard.

### 1.3.2.2 Channel Applications Manager

The following change is made to the Channel Applications Manager between Release 7.5 and Release 8.0.

- [Display Customer Search Screen Configuration](#)

#### 1.3.2.2.1 Display Customer Search Screen Configuration

In previous releases, the Order Entry Task displayed the basic customer search screen. In Release 8.0, the Order Entry Task displays the advanced customer search screen.

## How It Affects You

If you have already changed the configurations for order entry rules in Release 7.5, the new behavior does not affect you. Otherwise, the advanced customer search screen is displayed in the Order Entry Task.

### Migration Strategy

If you want the Order Entry Task to display the advanced customer search screen, you must re-configure the order entry rules. For more information about configuring the order entry rules, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

#### 1.3.2.3 Sterling Call Center and Sterling Store API

The following change is made to Sterling Call Center and Sterling Store in Release 8.0.

- [getSalesOrderDetailsWithLocalQty API](#)

##### 1.3.2.3.1 getSalesOrderDetailsWithLocalQty API

In Release 8.0, the `getSalesOrderDetailsWithLocalQty` API has been replaced with `getCompleteOrderDetails` API. For the list of deprecated APIs, refer to the [Deprecated](#) link in the *Sterling Call Center and Sterling Store: Javadocs*.

### How It Affects You

If you are calling the `getSalesOrderDetailsWithLocalQty` API in any of your customized screens, you need to use the `getCompleteOrderDetails` API instead. For more information about the `getCompleteOrderDetails` API, see the *Sterling Call Center and Sterling Store: Javadocs*.

### Migration Strategy

None.

### Automated Migration Processes

None.

### Manual Migration Processes

Use the `getCompleteOrderDetails` API in place of `getSalesOrderDetailsWithLocalQty` API.

### 1.3.3 Important Behavior Changes between Release 8.0 and Release 8.5

This section describes, in detail, the various behavior changes between Sterling Call Center and Sterling Store, Release 8.0 and Release 8.5.

#### 1.3.3.1 Sterling Call Center and Sterling Store User Interface

New UI features have been introduced in Sterling Call Center and Sterling Store, Release 8.5. This section explains those features that impact your UI because of migration. For more information about all the new features introduced in Sterling Call Center and Sterling Store, Release 8.5, see the *Sterling Call Center and Sterling Store: Release Notes* and the *Sterling Call Center and Sterling Store: User Guide*.

The following features will impact your UI because of your migration to Sterling Call Center and Sterling Store, Release 8.5:

- [Advanced Customer Identification Screen](#)
- [Notes Panel](#)
- [Add Items Screen](#)
- [Create Order Screen](#)
- [Create Order: Customer Search Screen](#)
- [Create Return: Customer Search Screen](#)
- [Order Summary Screen](#)
- [Line Summary Screen](#)
- [Payment Inquiry Screen](#)
- [Quick Access Screen](#)
- [Address Capture Screens](#)
- [Item Details Screen](#)
- [Enhanced Change Payment Methods Screen](#)
- [Change Gift Options Screen](#)
- [Confirm Payment Screen](#)
- [Manage Customer Payment Methods Screen](#)
- [Alert Notification Panel](#)

- [Create Alert Screen](#)
- [Shipment Inquiry Screen](#)
- [Shipment Details Screen](#)
- [Cancel Order Screen](#)
- [Manage Users Task](#)
- [Price Match Task](#)
- [Create Business Customer Screen](#)
- [Add Competitor Screen](#)
- [Change Fulfillment Options Screen](#)
- [Service Fulfillment Summary Screen](#)
- [View/Change Service Instructions Screen](#)
- [Change Service Appointment Screen](#)
- [Add New Payment Method Pop-up window](#)
- [Manage User Assignments Screen](#)
- [Customer Pick Screen](#)
- [Alert Details Screen](#)

### **1.3.3.1.1 Advanced Customer Identification Screen**

The Advanced Customer Identification screen in the Create Order task flow has been enhanced to enable users to allow tax exemptions on an order that has been created and confirmed. A new Customer Options panel has been added to the Advanced Customer Identification screen to indicate whether the order should be exempted from tax. This panel is, however, displayed only if the customer is a business customer and the Change Tax Options for a business customer rule is enabled in the Channel Applications Manager.

An Add New Contact hyperlink has been added to the Advanced Customer Identification screen that enables a user to add a new contact for a business customer when creating an order. Additionally, the Customer ID of the business customer is displayed in the Order Header panel of the Advanced Customer Identification screen.

**How It Affects You**

None.

**Migration Strategy**

None.

**1.3.3.1.2 Notes Panel**

The For Internal Use Only check box has been added to the Notes panel. A user can select this check box to mark a note as an internal note.

**How It Affects You**

None.

**Migration Strategy**

None.

**1.3.3.1.3 Add Items Screen**

The following changes have been made to the Add Items screen if the user has permission to the Update Order button:

- In the Line Total column, the charges and discounts applied to an order line are displayed as hyperlinks.
- A new icon has been added to the Line Total column, indicating that the order has to be updated to view the line total.
- The value of the Subtotal field is provided as a hyperlink.
- In the Large Order Item Entry screen, a new icon has been added next to the Subtotal value, indicating that the order has to be updated to view the order total.
- In the Large Order Item Entry screen, the Overridden (⚠) icon in the Fulfillment Method panel has been repositioned between the fulfillment method and the item availability date.
- In the Selected Line Information panel in the Large Order Item Entry screen, a new Line Total column has been added.
- If a user adds an item whose effective date has expired, and an associated item has already been configured to substitute it, the substitute item is added to the order in place of the original item.

- If a user selects an item from the Related Items pop-up window or panel that has been configured to replace the original item in the order, and clicks the Add to Order button, the original item is replaced with the related item.
- The following will be displayed in the Add Items screen if the item validation rules are configured in the Applications Manager:
  - An Error panel, which is displayed when an item in an order line fails validation, has been added.
  - An error icon has been added to indicate that one or more items in an order have failed validation.
- The following hyperlinks have been rearranged in the Selected Line Information panel in the Large Order Item Entry screen:
  - Change Style
  - Choose Style
  - Configure
  - Reconfigure

### **How It Affects You**

The price breakdown functionality is valid only if the user has permission to the Update Order button.

### **Migration Strategy**

None.

#### **1.3.3.1.4 Create Order Screen**

A new field, Draft Order Name, has been added to the Confirm pop-up window that is displayed when a user attempts to close the Create Order screen before completing the process of order creation.

### **How It Affects You**

None.

### **Migration Strategy**

None.

#### **1.3.3.1.5 Create Order: Customer Search Screen**

The Enter Billing Address Only button has been removed from the Create Order: Customer Search screen. To update the Bill To Address, click the Edit Address hyperlink in the Bill To Address panel.

##### **How It Affects You**

To update the Bill To Address, click the Edit Address hyperlink in the Bill To Address panel.

##### **Migration Strategy**

None.

#### **1.3.3.1.6 Create Return: Customer Search Screen**

The Enter Refund Address Only button has been removed from the Create Return: Customer Search screen. To update the Return To Address, click the Edit Address hyperlink in the Return To Address panel.

##### **How It Affects You**

To update the Return To Address, click the Edit Address hyperlink in the Return To Address panel.

##### **Migration Strategy**

None.

#### **1.3.3.1.7 Order Summary Screen**

A new Display Status field has been added to the Order Summary screen. The new field will be displayed if the YFSGetOverallStatusUE user exit is implemented to return the `OverallStatus` attribute. In addition, the Total Amount value is displayed as a hyperlink.

If the order is incompatible with the version of the application being used, the Order Summary screen is displayed with minimal functionality.

##### **How It Affects You**

If the order is incompatible with the version of the application being used, the user will not be allowed to perform any of the order modification tasks except cancelling the order in the Order Summary

screen. This is applicable only if you have configured the Qualified Tag Version Compatibility.

### **Migration Strategy**

None.

#### **1.3.3.1.8 Line Summary Screen**

In Sterling Call Center and Sterling Store, Release 8.5, a new Display Status field has been added to the Line Summary screen. The new field will be displayed if the YFSGetOverallStatusUE user exit is implemented to return the `OverallStatus` attribute.

The Line Summary screen has been enhanced to include a View Product Web Page hyperlink. Users can click this hyperlink to view the Web page pertaining to the corresponding item.

The Line Summary screen has been enhanced to display the gift message if a message has been included with the gift item.

### **How It Affects You**

If an asset type is selected in the Display of a Product Web Page for an Item rule of the Channel Applications Manager, the View Product Web Page hyperlink is displayed in the Line Summary screen.

### **Migration Strategy**

None.

#### **1.3.3.1.9 Payment Inquiry Screen**

A new Payment Status field has been added to the Payment Inquiry screen to indicate the payment status of an order. The new field will be displayed if the YFSGetOverallStatusUE user exit is implemented to return the `PaymentStatus` attribute.

### **How It Affects You**

None.

### **Migration Strategy**

None.



### 1.3.3.1.10 Quick Access Screen

A new Scratch Pad panel has been introduced within the Related Tasks panel. Users can use the scratch pad to jot down information during a call, copy information from one screen to another, and refer to this information later.

An Announcements panel has been introduced within the Quick Access panel in the Quick Access screen. Users who belong to a user group that has the necessary permission, can view the Announcements panel.

The CSR Messages panel in the Quick Access screen has been enhanced to display the Alerts ( ) icon and the Announcements ( ) icon.

#### How It Affects You

If you have customized the Quick Access panel, and want the Announcements panel to be displayed, the customizations applied to the Quick Access panel may be lost depending on the customization performed.

If you have performed any customizations in the CSR Messages panel of the Quick Access screen, the customizations will be lost.

#### Migration Strategy

You must reapply the customizations for the Quick Access panel.

You must reapply the customizations in the CSR Messages panel.

### 1.3.3.1.11 Address Capture Screens

The address capture screens have been enhanced to default the City and the State names using the Country and Postal Code.

The address capture screens have been enhanced to include a Display Address As field. This field is displayed only if the address is created for a customer or if an order is created in the context of a customer. Users can provide a description for the address in the Display Address As field. If a description is provided for an address, this description is displayed in some of the screens displaying address information in the Sterling Call Center and Sterling Store application.

The address capture screens have been enhanced to allow users to include the Title and Address Type attributes. To define titles for an enterprise, from the Channel Applications Manager > Define Customers,

select Define Titles. The radio button options for Address Type are Commercial and Residential.

The address capture screens have been enhanced to pass the Enterprise Code to the verifyAddress API. This API has been enhanced to validate addresses specific to an enterprise.

### **How It Affects You**

The City and State fields can be derived using the Country and Postal Code only if an appropriate region schema is selected in the Region Schema To Use For Defaulting City and State from Postal Codes rule of the Channel Applications Manager.

### **Migration Strategy**

None.

#### **1.3.3.1.12 Item Details Screen**

In Sterling Call Center and Sterling Store, Release 8.5, the More Details of Selected Item pop-up window that can be opened from the Item Details screen, has been enhanced to include an Item Instructions tab. Users can view the instructions pertaining to an item from the Item Instructions tab.

The Item Details screen has been enhanced to include a View Product Web Page hyperlink. Users can click this hyperlink to view the Web page pertaining to the corresponding item.

### **How It Affects You**

If an asset type is selected in the Display of a Product Web Page for an Item rule in the Channel Applications Manager, the View Product Web Page hyperlink is displayed in the Item Details screen.

### **Migration Strategy**

None.

#### **1.3.3.1.13 Enhanced Change Payment Methods Screen**

In Sterling Call Center and Sterling Store, Release 8.5, an enhanced Change Payment Methods screen has been introduced. In this screen, payment methods are displayed in panels, and are in the order of the

charge sequence and available funds. A new resource ID has been provided for the Payment Confirmation screen that is displayed in the Order Creation flow and Order Modification flow.

### **How It Affects You**

The enhanced Change Payment Methods screen is displayed and the user will no longer be able to view the existing Change Payment Methods screen.

### **Migration Strategy**

If you want to display the existing Change Payment Methods screen, remove the permissions for the enhanced Change Payment Method task and provide permissions for the existing Change Payment Method task. You should also provide permissions for displaying the Payment Confirmation screen. For more information about providing permissions for user groups, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

#### **1.3.3.1.14 Change Gift Options Screen**

In Sterling Call Center and Sterling Store, Release 8.5, the Change Gift Options task is enhanced to include a Gift Message text box which enables users to include a message with an item marked as a gift.

### **How It Affects You**

None.

### **Migration Strategy**

None.

#### **1.3.3.1.15 Confirm Payment Screen**

The Confirm Payment screen that is displayed during the order creation flow and the order modification flow, has been enhanced to display the Funds field for a customer account payment method in the Payment Methods panel.

The Confirm Payment screen has also been enhanced to validate the available balance on the account limit for the customer account payment type. If the customer account limit is exceeded, a warning message is displayed.

If an exchange order is opened from the sales order flow, the Confirm Payment screen that is displayed during order creation has been enhanced. It can now verify whether the return order associated with the exchange order has been confirmed. If the return order has not been confirmed, an appropriate message is displayed. A View Return Order hyperlink has also been provided to enable users to access the corresponding return order.

### How It Affects You

None.

### Migration Strategy

None.

#### 1.3.3.1.16 Manage Customer Payment Methods Screen

The Add New Payment Method pop-up window that can be opened from the Manage Customer Payment Methods screen has been enhanced to display the Currency and Account Limit field for a customer account payment method.

In addition, some of the payment method panels that can be viewed from the Manage Customer Payment Methods screen have been enhanced to display a Modify hyperlink. When you click the Modify hyperlink in a payment method panel, a Modify Existing Payment Method pop-up window is displayed, from which you can modify the attributes of the applicable customer payment method.

**Note:** You can modify all attributes of a customer payment method, except the following:

- For the Credit Card payment method, you cannot modify the Credit Card #.
- For the Customer Account payment method, you cannot modify the Account #.
- For other payment methods, you cannot modify any attribute that has a unique identifier.

In previous releases, the payment methods pertaining to a consumer customer could be saved for the customer contacts. However, in Release

8.5, the payment methods pertaining to a consumer customer can be saved only for the customer and not for the customer contacts.

### **How It Affects You**

None.

### **Migration Strategy**

If you have already saved payment methods saved for the customer contacts in your database, the payment methods will be transferred to the customer when you run the transaction and history data migration scripts.

#### **1.3.3.1.17 Alert Notification Panel**

The Do Not Notify check box is now displayed in the Alert Notification panel based on user permissions.

### **How It Affects You**

When an enterprise upgrades the Sterling Call Center and Sterling Store application, the permission to turn off notifications using the Do Not Notify check box in the Alert Notification panel is automatically provided to the existing user groups.

### **Migration Strategy**

None.

#### **1.3.3.1.18 Create Alert Screen**

In Sterling Call Center and Sterling Store, Release 8.5, the Create Alert screen has been enhanced to include an Enterprise drop-down list if the user has access to multiple enterprises. Users can select the enterprise for which an alert has to be created.

### **How It Affects You**

If the users has access to multiple enterprises, the Enterprise drop-down list will be displayed in the Create Alert screen.

### **Migration Strategy**

None.

### 1.3.3.1.19 Shipment Inquiry Screen

In Sterling Call Center and Sterling Store, Release 8.5, the Shipment Inquiry screen has been enhanced to include a View Container Activities hyperlink. However, the hyperlink is displayed only if activities have been specified for the corresponding container.

The View Shipment hyperlink can be used to view the shipment details of an order. In previous releases, the `getShipmentDetails` API was called to retrieve the shipment details. In Sterling Call Center and Sterling Store, Release 8.5, the `getSortedShipmentDetails` API is called to display the shipment details.

#### How It Affects You

If activities are specified for the container, a View Container Activities hyperlink is displayed in the Shipment Inquiry screen.

The Shipment Details pop-up window, which is displayed when users click the View Shipment hyperlink, displays all the shipment lines pertaining to a shipment. The shipment lines are sorted alphabetically based on the items. In case of bundle items and related items, the bundle component items and related items are sorted alphabetically and are displayed under the parent item.

#### Migration Strategy

None.

### 1.3.3.1.20 Shipment Details Screen

In Sterling Store, Release 8.5, the Shipment Details screen has been enhanced to include a View Container Activities hyperlink. However, the hyperlink is displayed only if activities have been specified for the corresponding container.

In previous releases, the `getShipmentDetails` API was called to display the shipment details of an order. In Sterling Call Center and Sterling Store, Release 8.5, the `getSortedShipmentDetails` API is called to display the shipment details.

#### How It Affects You

If activities are specified for the container, a View Container Activities hyperlink is displayed in the Shipment Details screen.

The Shipment Details screen will display the items sorted alphabetically based on the items. In case of bundle items and related items, the bundle component items and related items are sorted alphabetically and are displayed under the parent item.

### **Migration Strategy**

None.

#### **1.3.3.1.21 Cancel Order Screen**

In Sterling Call Center and Sterling Store, Release 8.5, the Cancel Order screen has been enhanced to display cancellation reasons that are specific to a particular version of the Sterling Call Center and Sterling Store application, in the Reason Code drop-down list.

### **How It Affects You**

None.

### **Migration Strategy**

To configure the cancellation reasons for a specific version of the Sterling Call Center and Sterling Store application, define qualifiers for the common codes. For more information about defining qualifiers, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

#### **1.3.3.1.22 Manage Users Task**

In Release 8.5, the User Security > Manage Users task, which is located in the Tasks panel of the Quick Access screen, has been deprecated. The functionality provided in the Manage Users task is now available from the User Management > Modify User task located in the Tasks panel of the Quick Access screen.

### **How It Affects You**

In the Tasks panel of the Quick Access screen, the User Management > Modify User task (new task) and the User Security > Manage Users task (deprecated task) will both be displayed if the existing users have permission to both the new task and the deprecated task. However, even if the Manage Users task is displayed, Sterling Commerce recommends that you use the Modify User task.

### Migration Strategy

None.

#### 1.3.3.1.23 Price Match Task

In Release 8.5, the Price Match Worksheet screen has been enhanced to save the ORDER\_HEADER\_KEY column in the YFS\_ORDER\_LINE\_PRICE\_MATCH table during the price match task.

### How It Affects You

None.

### Migration Strategy

If you already have price match records saved in your database, the existing records pertaining to the YFS\_ORDER\_LINE\_PRICE\_MATCH table are updated with the ORDER\_HEADER\_KEY column when you run the transaction and history data migration scripts.

#### 1.3.3.1.24 Create Business Customer Screen

The Create Business Customer screen displayed in Release 8.0 and earlier releases has been deprecated. In Release 8.5, an additional screen has been added to the Create Business Customer task, and some of the existing fields have been rearranged.

### How It Affects You

In the first screen of the Create Business Customer task, enter customer and organization-level attributes. In the second screen of the Create Business Customer task, enter information about the customer contact.

If you extended a Create Business Customer screen in Release 8.0 or earlier releases, the

`com.yantra.pca.ycd.rcp.tasks.customerBusinessEntry.wizardpages.YCDBusinessCustomerEntryWizardPage` page ID, which is part of the `com.yantra.pca.ycd.rcp.tasks.customerBusinessEntry.wizards.YCDBusinessEntryWizard` form ID and the `com.yantra.pca.ycd.rcp.tasks.customerBusinessEntry.wizards.YCDOrderEntryBusinessEntryWizard` form ID, will not be applied to the new business customer screens provided in Release 8.5.



## Migration Strategy

None.

### 1.3.3.1.25 Add Competitor Screen

In Sterling Call Center and Sterling Store, Release 8.5, the fields present in the Competitor Details panel of the Add Competitor screen have been repositioned.

## How It Affects You

If you have performed any customizations in the Competitor Details panel, the customizations will be lost.

## Migration Strategy

You must reapply the customizations in the Competitor Details panel.

### 1.3.3.1.26 Change Fulfillment Options Screen

In Sterling Call Center and Sterling Store, Release 8.5, the Change Fulfillment Options screen has been enhanced to include a Perform Advanced Service Grouping check box. Users can select this check box to group order lines into smaller groups to ensure that appointments will be available for various services.

## How It Affects You

None.

## Migration Strategy

None.

### 1.3.3.1.27 Service Fulfillment Summary Screen

In Sterling Call Center and Sterling Store, Release 8.5, the Service Fulfillment Summary screen has been enhanced to include an Advanced Service Grouping button. Users can click this button to group order lines into smaller groups to ensure that appointments will be available for various services.

## How It Affects You

None.

### **Migration Strategy**

None.

#### **1.3.3.1.28 View/Change Service Instructions Screen**

In Sterling Call Center and Sterling Store, Release 8.5, the View/Change Service Instructions screen has been enhanced to include an Advanced Service Grouping button. Users can click this button to group order lines into smaller groups to ensure that appointments will be available for various services.

### **How It Affects You**

None.

### **Migration Strategy**

None.

#### **1.3.3.1.29 Change Service Appointment Screen**

In Sterling Call Center and Sterling Store, Release 8.5, the Change Service Appointment screen has been enhanced to include an Advanced Service Grouping button. Users can click this button to group order lines into smaller groups to ensure that appointments will be available for various services.

The screen has also been enhanced to display a Take Appointment Later hyperlink. Users can click on the Take Appointment Later hyperlink to continue with the order confirmation process without taking an appointment.

### **How It Affects You**

None.

### **Migration Strategy**

None.

#### **1.3.3.1.30 Add New Payment Method Pop-up window**

In the Add New Payment Method pop-up window, under the Check payment type, the Check Number field has been renamed as Check Account Number.

**How It Affects You**

None.

**Migration Strategy**

None.

**1.3.3.1.31 Manage User Assignments Screen**

The user search criteria in the Manage User Assignments screen has been standardized to provide the same search functionality that is provided in the Manage User screen. The user search criteria includes Organization, User ID, Name, and Status (Active or Inactive).

**How It Affects You**

If you extended the user search criteria of the Manage User Assignments screen, the extensions will be lost.

**Migration Strategy**

If you extended the user search criteria of the Manage User Assignments screen, you need to reattach your controls.

**1.3.3.1.32 Customer Pick Screen**

In previous releases, the `getShipmentDetails` API was called to retrieve the list of items to be picked pertaining to a shipment. In Sterling Call Center and Sterling Store, Release 8.5, the `getSortedShipmentDetails` API is called to retrieve the list of items to be picked.

**How It Affects You**

The items to be picked are sorted alphabetically based on the items. In case of bundle items and related items, the bundle component items and related items are sorted alphabetically and are displayed under the parent item.

**Migration Strategy**

None.

**1.3.3.1.33 Alert Details Screen**

In Sterling Call Center and Sterling Store, Release 8.5, if a user, when resolving the Verify Address alert type, modifies the address for an order having an associated work order, the Alert Details screen displays an error message indicating that the user has to navigate to the Change Fulfillment Options screen to modify the address on the order.

### **How It Affects You**

None.

### **Migration Strategy**

None.

### **1.3.3.2 Channel Applications Manager**

The following changes have been made to the Channel Applications Manager between Release 8.0 and Release 8.5.

- [Change Tax Options Screen Configuration](#)
- [Item Association Configuration](#)
- [Country and State Display Rules Configuration](#)
- [Display of a Product Web Page for an Item Configuration](#)
- [Available Gift Options Configuration](#)
- [FTC Compliance Configuration](#)
- [External User Interface Rules Configuration](#)

#### **1.3.3.2.1 Change Tax Options Screen Configuration**

In Sterling Call Center and Sterling Store, Release 8.5, the Change Tax Options rule has been added to the Order Entry Controller wizard to enable a user to allow tax exemptions on an order for business customers.

### **How It Affects You**

If the Change Tax Options rule is selected in the Order Entry Controller wizard, the Customer Options panel is displayed in the Advanced Customer Identification screen.

## Migration Strategy

None.

### 1.3.3.2.2 Item Association Configuration

In Release 8.5, the Order Entry Controller Wizard has been enhanced to enable users to specify whether an associated item should replace the original item, or whether it should be added as a related item when the associated item is added to an order.

#### How It Affects You

- If a user selects Replace Item from the Item Association drop-down list, an associated item replaces the original item when the associated item is added to an order.
- If a user selects Relate Item from the Item Association drop-down list, an associated item is added as a related item when the associated item is added to an order.

## Migration Strategy

None.

### 1.3.3.2.3 Country and State Display Rules Configuration

In Release 8.5, the Configure Country and State Display rule has been enhanced to enable users to select a region schema for deriving the City and State names using the Country and Postal Code.

#### How It Affects You

If you select a region schema from the Region Schema To Use For Defaulting City And State From Postal Codes drop-down list, the City and State names will be populated using the Country and Postal Code.

## Migration Strategy

None.

### 1.3.3.2.4 Display of a Product Web Page for an Item Configuration

In Sterling Call Center and Sterling Store, Release 8.5, a Configure Display of a Product Web Page for an Item rule has been introduced to

enable you to select an asset type to be used to display the URL of a product Web page for an item.

### **How It Affects You**

If an asset type is selected from the Asset Type To Be Used When Displaying The Product Web Page For An Item drop-down list, a View Product Web Page hyperlink is displayed in the Item Details screen and the Line Summary screen.

### **Migration Strategy**

None.

#### **1.3.3.2.5 Available Gift Options Configuration**

In Sterling Call Center and Sterling Store, Release 8.5, the Configure Available Gift Options rule has been enhanced to enable you to select either an entire work order or individual work order lines as a gift item.

The Configure Available Gift Options rule has also been enhanced to enable you to gift wrap an item marked as a gift.

### **How It Affects You**

If you select the Work Order Level option, the user will be able to select the entire work order to mark as a gift item.

If you select the Allow Gift Wrapping Of Items check box, the Gift Wrap Item check box will be displayed while setting gift options.

### **Migration Strategy**

None.

#### **1.3.3.2.6 FTC Compliance Configuration**

In previous releases, the value for the Default Cancel Date (days) provided in the FTC Compliance screen of the Channel Applications Manager was set to 5. In Sterling Call Center and Sterling Store, Release 8.5, the value for the Default Cancel Date (days) has been changed to 3.

### **How It Affects You**

If you have already changed the configurations for FTC Compliance in Release 8.0, the new behavior does not affect you. If you have not

changed the configurations, the value for the Default Cancel Date (days) is displayed as 3.

### **Migration Strategy**

To set the value for the Default Cancel Date (days) to 3, you must reconfigure the value. For more information about configuring the default value for the cancel date, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

#### **1.3.3.2.7 External User Interface Rules Configuration**

In Sterling Call Center and Sterling Store, Release 8.5, the External User Interface URL, `http://localhost:7001/yantra/console/order.list` provided in the External User Interface Rules screen has been changed to `http://localhost:7001/smcfs/console/order.list`.

### **How It Affects You**

If you have already changed the configurations for External User Interface Rules in Release 8.0, the new behavior does not affect you. If you have not changed the configurations, the value for the External User Interface URL is displayed as `http://localhost:7001/smcfs/console/order.list`.

### **Migration Strategy**

To specify a different URL, enter the new URL in the External User Interface URL box of the External User Interface Rules screen. For more information about configuring the external user interface rules, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

#### **1.3.3.3 Sterling Call Center and Sterling Store User Exit**

The following change has been made to Sterling Call Center and Sterling Store user exits in Release 8.5:

- [YCDPromotionValidationUE User Exit](#)

##### **1.3.3.3.1 YCDPromotionValidationUE User Exit**

In Release 8.5, the YCDPromotionValidationUE user exit has been deprecated and the `validateCoupon` API is used in its place to perform coupon validations.

### How It Affects You

- If you have previously implemented the YCDPromotionValidationUE user exit, there will not be any impact to the coupon validation logic. However, if you remove the user exit implementation, you must implement the YPMValidateCouponUE user exit to perform coupon validations.
- If you have never implemented the YCDPromotionValidationUE user exit, the validateCoupon API is called to perform coupon validations.

### Migration Strategy

None.

#### 1.3.3.4 Sterling Call Center and Sterling Store com.jar file

In Release 8.5, the `com.jar` file located in the `plugins` folder has been split into multiple JAR (Java ARchive) files. When a customer upgrades the Sterling Call Center and Sterling Store application with the auto updates which are provided as part of hot fix releases, the relevant JAR files are automatically downloaded.

### How It Affects You

None.

### Migration Strategy

None.

#### 1.3.3.5 Sterling Call Center and Sterling Store Data Security Access

In Release 8.5, Sterling Call Center and Sterling Store has been enhanced to support data security access based on teams defined for an enterprise.

Additionally, all the services that generate alerts for orders have been enhanced to copy the Customer ID in the order to the alert.

### How It Affects You

The tasks that users can perform are dependent on the teams to which they are assigned. If the user has access to multiple enterprises, all the



enterprises will be listed during the Create Order, Create Competitor, and Create Price Match tasks.

### **Migration Strategy**

If you do not want to use the enhanced data security access policies, disable the Data Security Access Policy rule. If you want to use the enhanced data security access policies, define teams for the users. For more information about configuring data security, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

If you are already using the services that generate alerts, configure the services to copy the Customer ID in the order to the alert.

## **1.4 Migrating Estimates**

Only the factory defaults migration is involved when upgrading from Release 8.0 to Release 8.5. Therefore, the upgrade tasks complete in minimum time.



## Upgrading to Release 8.5

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This chapter describes the sequence of procedures you must follow to upgrade from Release 7.4 or higher, to Release 8.5.

### 2.1 Installing Release 8.5

Before proceeding with the upgrade, ensure that you:

- Modify the values of the following properties in the `sandbox.cfg` file located in the `<INSTALL_DIR>/properties` directory as follows:
  - `REINIT_DB=false`
  - `LOAD_FACTORY_SETUP=false`
  - `NO_DBVERIFY=true`
- Rerun `setupfiles.sh` from the `<INSTALL_DIR>/bin` directory.

If the properties are already set, skip this task.

- Install Sterling Call Center and Sterling Store, Release 8.5. Ensure that you select the Upgrade option while installing.

For more information about installing Sterling Call Center and Sterling Store, Release 8.5, see the *Sterling Call Center and Sterling Store: Installation Guide*.

### 2.2 Pre-Migration Activities

Before upgrading Sterling Call Center and Sterling Store, ensure that you set the following environment variables appropriately:

- `JAVA_HOME`

- ANT\_HOME
- ANT\_OPTS

For more information about setting the environment variables, see the *Selling and Fulfillment Foundation: Installation Guide*.

## 2.3 Running the Upgrade Using NFS Mounting

Sterling Commerce recommends that you run the upgrade from the database server instead of the application server to avoid significant network overhead. Therefore, to avoid installing the complete Selling and Fulfillment Foundation on the database server, use NFS mounting.

To use NFS mounting:

1. Create a user on the database server with the user identification (UID), and group identification (GID) as the user who installed the Selling and Fulfillment Foundation on your application server. It is preferred that this user also has the same user name. For example, if the UNIX user 'Sterlite' is used for installing and running Sterling Call Center and Sterling Store, Release 8.5 with a UID of 5001 and GID of 101, the user that you create on the database server must have a UID of 5001 and GID of 101, and preferably is named 'Sterlite'.
2. Share the <INSTALL\_DIR> directory on the application server.
3. Mount the <INSTALL\_DIR> directory with the same path on the database server. For example, if your <INSTALL\_DIR> is /apps/Sterling on the application server, mount it as /apps/Sterling on the database server.
4. Share the <JAVA\_HOME> directory that you are using for the Selling and Fulfillment Foundation from the application server as you might have multiple Java versions installed on the application server for various reasons.
5. Mount the <JAVA\_HOME> directory with the same path on the database server. For example, if your <JAVA\_HOME> is /apps/java on the application server, you must mount it as /apps/java on the database server.

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**Note:** Ensure that you only perform NFS mount for <INSTALL\_DIR> and <JAVA\_HOME> directories. Do not perform NFS mount for database files. Sterling Commerce recommends that you do not perform NFS mount for write-intensive applications, as it drastically impacts the database performance.

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6. Log in as the Selling and Fulfillment Foundation Administrator on the database server.

## 2.4 Upgrading to Sterling Call Center and Sterling Store, Release 8.5 along with Selling and Fulfillment Foundation, Release 8.5

After you have installed the Selling and Fulfillment Foundation, Release 8.5, or higher, install the Sterling Call Center and Sterling Store, Release 8.5 and perform the upgrade tasks.

### 2.4.1 Upgrading to Selling and Fulfillment Foundation, Release 8.5

To perform the upgrade, see the *Selling and Fulfillment Foundation: Upgrade Guide*. Before performing post-migration activities, perform the upgrade task for Sterling Call Center and Sterling Store, Release 8.5. For more information about performing the upgrade for Sterling Call Center and Sterling Store, see [Section 2.4.2, "Upgrading to Sterling Call Center and Sterling Store, Release 8.5"](#).

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**Note:** Do not perform the installPCAs task when upgrading to Sterling Call Center and Sterling Store, Release 8.5 along with Selling and Fulfillment Foundation, Release 8.5

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**Note:** When migrating from Sterling Call Center and Sterling Store, Release 7.4 installed on Sterling Supply Chain Applications, Release 7.9, copy the `ycdshared.jar` and the `ycdbe.jar` files from the `<YFS_HOME_OLD>/lib` directory to the `<INSTALL_DIR>/Migration/lib/overrides/7.9` directory. You must perform this task before you upgrade to Selling and Fulfillment Foundation, Release 8.5.

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**Note:** To perform data validation for Sterling Call Center and Sterling Store, Release 8.5 before upgrading to Selling and Fulfillment Foundation, Release 8.5, see [Section 2.4.2.1, "Pre-Data Migration Validation"](#).

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## 2.4.2 Upgrading to Sterling Call Center and Sterling Store, Release 8.5

The Selling and Fulfillment Foundation, Release 8.5 upgrade performs the following upgrade tasks for Sterling Call Center and Sterling Store:

- Alters the schema
- Copies the current customizations

### 2.4.2.1 Pre-Data Migration Validation

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**Note:** If you are upgrading from Release 8.0 to Release 8.5, do not perform the pre-data migration validation.

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You must run the following data validation script before performing the data migration. If any validation fails, you cannot proceed with the migration.

To perform validation, run the following commands from the `<INSTALL_DIR>/COM/Migration/8.0` directory:

```
${ANT_HOME}/bin/ant -f ycdmigration.xml  
-Druntime=<INSTALL_DIR> -Druntime.old=<YFS_HOME_OLD>
```

```
-DYANTRA_HOME.OLD=<YANTRA_HOME_OLD>
-Dtarget=migration-validation migrate -logfile <logfile>
```

## Validations for Release 7.5

The following validations are performed for this release:

- Validation: Identifies whether order lines with logical kit items exist.
  - Message: "Found orders with Logical Kits"
  - Reason: Migration of Order Lines for Logical Kit Items is not supported.
- Validation: Identifies any existing Price Match records.
  - Message: "Found existing price match records."
  - Reason: Migration of Price Match records is not supported
  - Action: Existing price match records will not be supported.

### 2.4.2.2 History Data Migration

To migrate the history data when upgrading from Release 8.0 to 8.5, run the following commands from the <INSTALL\_DIR>/COM/Migration/8.0 directory:

```
${ANT_HOME}/bin/ant -f ycdmigration.xml
-Druntime=<INSTALL_DIR> -Druntime.old=<INSTALL_DIR_OLD>
-DapplySOM=true -Dtarget=upgrade-history-tables migrate
-logfile <logfile>
```

- The actual data migration of all transaction data present in the transaction tables are done. All new indexes required for performance are added. After migration of transaction data, transaction tables will have new columns and data.
- This command has 3 inner tasks which are performed. They are:
  - pre-history-migration
  - migrate-history-data
  - post-history-migration
- If you are migrating only the Call Center Order Management application transaction data:

- When upgrading from Release 8.0 to 8.5, run the following command:

```
{ANT_HOME}/bin/ant -f ycdmigration.xml
-Druntime=<INSTALL_DIR> -Druntime.old=<INSTALL_DIR_OLD>
-DapplySOM=false -Dtarget=upgrade-history-tables migrate
-logfile <logfile>
```

- The actual data migration of all history data present in the history tables are done. All new indexes required for performance are added. After migration of history data, history tables will have new columns and data.
- This command has 3 inner tasks which are performed. They are:
  - pre-history-migration
  - migrate-history-data
  - post-history-migration
- The \*.done files created in the status folder in Release 8.0 for the task upgrade-history-tables are:
  - history\_ant\_migration.xml.done
  - history\_ant\_premigration.xml.done

### 2.4.2.3 Transaction Data Migration

To migrate the transaction data, run the following commands from the <INSTALL\_DIR>/COM/Migration/8.0 directory:

- If you are migrating the Call Center Order Management application transaction data along with the Store Order Management application:
  - When upgrading from Release 7.4, 7.5 to 8.5, run the following command:

```
{ANT_HOME}/bin/ant -f ycdmigration.xml
-Druntime=<INSTALL_DIR> -Druntime.old=<YFS_HOME_OLD>
-DYANTRA_HOME.OLD=<YANTRA_HOME_OLD> -DapplySOM=true
-Dtarget=upgrade-transaction-tables migrate -logfile
<logfile>
```



---



---

**Note:** As part of the transaction data migration, only the factory defaults are upgraded.

---



---

- When upgrading from Release 8.0 to 8.5, run the following command:

```

${ANT_HOME}/bin/ant -f ycdmigration.xml
-Druntime=<INSTALL_DIR> -Druntime.old=<INSTALL_DIR_OLD>
-DapplySOM=true -Dtarget=upgrade-transaction-tables
migrate -logfile <logfile>
    
```

---



---

**Note:** As part of the transaction data migration, both the factory defaults and the transaction data are upgraded.

---



---

- The actual data migration of all transaction data present in the transaction tables are done. All new indexes required for performance are added. After migration of transaction data, transaction tables will have new columns and data.
- This command has 4 inner tasks which are performed. They are:
  - pre-transaction-migration
  - migrate-transaction-data
  - post-transaction-migration
  - apply-fc-setup for COM and COM\_Add-in
- The \*.done files created in the status folder in Release 8.0 for the task upgrade-transaction-tables are:
  - transaction\_applycomfcsetup.xml.done
  - transaction\_applysomfcsetup.xml.done
  - transaction\_Add-in\_applycomfcsetup.xml.done
  - transaction\_Add-in\_applysomfcsetup.xml.done
- The \*.done files created in the status folder in Release 7.5 for the task upgrade-transaction-tables are:
  - transaction\_applycomfcsetup.xml.done
  - transaction\_applysomfcsetup.xml.done

- transaction\_Add-in\_applycomfcsetup.xml.done
  - transaction\_Add-in\_applysomfcsetup.xml.done
- The \*.done files created in the status folder in Release 7.4 for the task upgrade-transaction-tables are:
  - transaction\_applycomfcsetup.xml.done
  - transaction\_applysomfcsetup.xml.done
  - transaction\_Add-in\_applycomfcsetup.xml.done
  - transaction\_Add-in\_applysomfcsetup.xml.done
- If you are migrating only the Call Center Order Management application transaction data:
  - When upgrading from Release 7.4, 7.5 to 8.5, run the following command:
 

```

          ${ANT_HOME}/bin/ant -f ycdmigration.xml
          -Druntime=<INSTALL_DIR> -Druntime.old=<YFS_HOME_OLD>
          -DYANTRA_HOME.OLD=<YANTRA_HOME_OLD> -DapplySOM=false
          -Dtarget=upgrade-transaction-tables migrate -logfile
          <logfile>
          
```
  - When upgrading from Release 8.0 to 8.5, run the following command:
 

```

          ${ANT_HOME}/bin/ant -f ycdmigration.xml
          -Druntime=<INSTALL_DIR> -Druntime.old=<INSTALL_DIR_OLD>
          -DapplySOM=false -Dtarget=upgrade-transaction-tables
          migrate -logfile <logfile>
          
```
  - The actual data migration of all transaction data present in the transaction tables are done. All new indexes required for performance are added. After migration of transaction data, transaction tables will have new columns and data.
  - This command has 4 inner tasks which are performed. They are:
    - pre-transaction-migration
    - migrate-transaction-data
    - post-transaction-migration
    - apply-fc-setup for COM and COM\_Add-in

- The \*.done files created in the status folder in Release 8.0 for the task upgrade-transaction-tables are:
  - transaction\_applycomfcsetup.xml.done
  - transaction\_Add-in\_applycomfcsetup.xml.done
- The \*.done files created in the status folder in Release 7.5 for the task upgrade-transaction-tables are:
  - transaction\_applycomfcsetup.xml.done
  - transaction\_Add-in\_applycomfcsetup.xml.done
- The \*.done files created in the status folder in Release 7.4 for the task upgrade-transaction-tables are:
  - transaction\_applycomfcsetup.xml.done
  - transaction\_Add-in\_applycomfcsetup.xml.done

After the tasks are completed, search for all \*.restart files under the following directories:

- 7.4/COM/database/FactorySetup/ycd
- 7.4/COM\_Add-in/database/FactorySetup/ycd
- 7.5/COM/database/FactorySetup/ycd
- 7.5/COM\_Add-in/database/FactorySetup/ycd
- 8.0/COM/database/FactorySetup/ycd
- 8.0/COM\_Add-in/database/FactorySetup/ycd

For the upgrade tasks to be successfully completed, ensure that the value of the Completed attribute is set to "Y" for all the tasks.

- If the value of the Completed attribute is set to "N" for any of the tasks, do not proceed with the upgrade. Contact Selling and Fulfillment Foundation Technical Support for assistance.

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**Note:** The transaction data migration is not performed in the activator mode. Therefore, the event handlers and pipeline conditions are not overridden.

---

---

- If you want to clear or remove all \*.restart and \*.done files before restarting the transaction data migration:

- When upgrading from Release 7.4, 7.5 to 8.5, run the following command:

```
`${ANT_HOME}/bin/ant -f ycdmigration.xml  
-Druntime=<INSTALL_DIR> -Druntime.old=<YFS_HOME_OLD>  
-DYANTRA_HOME.OLD=<YANTRA_HOME_OLD>  
-Dtarget=clean-up-for-rerun migrate -logfile  
<logfile>
```

- When upgrading from Release 8.0 to 8.5, run the following command:

```
`${ANT_HOME}/bin/ant -f ycdmigration.xml  
-Druntime=<INSTALL_DIR>  
-Druntime.old=<INSTALL_DIR_OLD>  
-Dtarget=clean-up-for-rerun migrate -logfile  
<logfile>
```

## 2.5 Upgrading to Sterling Call Center and Sterling Store, Release 8.5 after upgrading to Selling and Fulfillment Foundation, Release 8.5

Once you upgrade to the Selling and Fulfillment Foundation, Release 8.5, or higher, you can upgrade to the Sterling Call Center and Sterling Store, Release 8.5.

**Note:** When migrating from Sterling Call Center and Sterling Store, Release 7.4 installed on Sterling Supply Chain Applications, Release 7.9, copy the `ycdshared.jar` and the `ycdbe.jar` files from the `<YFS_HOME_OLD>/lib` directory to the `<INSTALL_DIR>/Migration/lib/overrides/7.9` directory. You must perform this task before you upgrade to Selling and Fulfillment Foundation, Release 8.5.

### 2.5.1 Before History and Transaction Migration

1. Go to the `<INSTALL_DIR>/COM/Migration/8.0` directory.
2. To generate the alter scripts for schema migration:

```

${ANT_HOME}/bin/ant -f ycdmigration.xml
-Dtarget=initupgrade migrate -logfile <logfile>

```

This command compares the entity xml files and generates the alter scripts for schema migration.

The \*.done files created in the status folder in Release 8.0 for the task initupgrade are:

```

- ant_uninstalljars.xml.done
- history_ant_upgradepreparation.xml.done
- transaction_ant_upgradepreparation.xml.done

```

If the initupgrade command fails, and you need to restart this task, run the following command:

```

${ANT_HOME}/bin/ant -f ycdmigration.xml
-Dtarget=clean-up-for-rerun migrate -logfile <logfile>

```

This command deletes the /history and /transaction sub-folders located in the  
 <INSTALL\_DIR>/COM/Migration/8.0/COM\_Add-in/database/scripts  
 /<db version> directory.

## 2.5.2 Pre-Data Migration Validation

The following data validation script must be run before performing the data migration. If any validation fails, you cannot proceed with the migration.

```

${ANT_HOME}/bin/ant -f ycdmigration.xml
-Dtarget=migration-validation migrate -logfile <logfile>

```

### Validations for Release 7.5

The following validations are performed for this release:

- Validation: Identifies whether order lines with logical kit items exist.
  - Message: "Found orders with Logical Kits"
  - Reason: Migration of Order Lines for Logical Kit Items is not supported.
- Validation: Identifies any existing Price Match records.
  - Message: "Found existing price match records."

- Reason: Migration of Price Match records is not supported
- Action: Existing price match records will not be supported.

### 2.5.3 History Tables Migration

To migrate the history tables, run the following commands from the `<INSTALL_DIR>/COM/Migration/8.0` directory:

1. `${ANT_HOME}/bin/ant -f ycdmigration.xml -Dtarget=alter-history-tables migrate -logfile <logfile>`
  - This command performs preparatory tasks before doing a history upgrade. This includes getting the size of tables to determine which tables will take a longer time to upgrade. This information is used later when doing the actual upgrade so as to minimize the time.
  - It then uses the size information available and does all the alterations to the history tables. After this step, the history tables will have new columns and data. Values in the history tables are trimmed for those data types that have been changed in the newer version.
  - The command runs an SQL query to populate data in the newly added `ORDER_HEADER_KEY` column of the `YFS_ORDER_LINE_PRICE_MATCH_H` table.
  - The command also runs an SQL query to clear data in the `CUSTOMER_CONTACT_KEY` column of the `YFS_CUSTOMER_PAYMENT_METHOD` table.
  - The `*.done` files created in the `status` folder in Release 8.0 for the task `alter-history-tables` are:
    - `history_ant_altertables.xml.done`
    - `history_ant_validation.xml.done`
  - If you encounter any error when altering history tables, fix the cause of the error and rerun the previous task of altering history tables. Before executing the task, change the value of the `onerror` attribute from "abort" to "continue" in the `<INSTALL_DIR>/Migration/8.0/COM_Add-in/history/ant_altertables.xml` file.

The onerror attribute specifies how to proceed when an error occurs during the execution of one of the statements. The valid values are:

- Continue—Indicates to ignore tables that encounter an error when altering them and proceed with altering other tables.
- Abort—Indicates that on encountering an error, do not proceed with altering other tables.

2. `${ANT_HOME}/bin/ant -f ycdmigration.xml -Dtarget=install-history-indexes -Dnonuniqueindex=Y migrate -logfile <logfile>`
  - This command adds all the unique and non-unique indexes. If you do not want to add the non-unique indexes, you must not pass the `-Dnonuniqueindex=Y` argument. The non-unique indexes are required for performance improvement. On a large database, non-unique indexes may take a significant amount of time for installation. You must analyze all the non-unique indexes to check whether all of them are required to be added.
  - The `*.done` files created in the `status` folder in Release 8.0 for the task `install-history-indexes` are:
    - `history_ant_installuniqueindexes.xml.done`
    - `history_ant_installnonuniqueindexes.xml.done`

---



---

**Note:** Check the logfile to ensure that all the indexes have been added successfully.

---



---



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**Note:** Between the time that you run the `upgrade-history-tables` and the `upgrade-transaction-tables` tasks, DO NOT purge or restore any data.

---



---

## 2.5.4 Transaction Tables Migration

To migrate the transaction data from Release 7.5 (or higher) to 8.5, run the following commands from `<INSTALL_DIR>/COM/Migration/8.0` directory:

1. `${ANT_HOME}/bin/ant -f ycdmigration.xml -Dtarget=alter-transaction-tables migrate -logfile <logfile>`
  - This command performs preparatory tasks before doing an upgrade. This includes getting the size of tables to determine which tables will take longer to upgrade. This information is used later when doing the actual upgrade so as to minimize the time.
  - It then uses the size information available and does the alterations to the transaction tables. After this step, the transaction tables will have new columns and data. Values in the transaction tables are trimmed for those data-types that have been changed in the newer version.
  - The command also runs a SQL query to populate data in the newly added ORDER\_HEADER\_KEY column of the YFS\_ORDER\_LINE\_PRICE\_MATCH table.
  - The command also runs an SQL query to clear data in the CUSTOMER\_CONTACT\_KEY column of the YFS\_CUSTOMER\_PAYMENT\_METHOD table.
  - The \*.done files created in the status folder in Release 8.0 for the task alter-transaction-tables are:
    - transaction\_ant\_altertables.xml.done
  - If you encounter any error when altering transaction tables, fix the cause of the error and rerun the previous task of altering transaction tables. Before executing the task, change the value of the onerror attribute from "abort" to "continue" in the <INSTALL\_DIR>/Migration/8.0/transaction/ant\_altertables.xml file.

The onerror attribute specifies how to proceed when an error occurs during the execution of one of the statements. The valid values are:

- Continue—Indicates to ignore tables that encounter an error when altering them and proceed with altering other tables.

Abort—Indicates that on encountering an error, do not proceed with altering other tables



2. To migrate the transaction data, run the following commands from the <INSTALL\_DIR>/COM/Migration/8.0 directory:

**Note:** As part of the transaction data migration, only the factory defaults are upgraded.

- If you are migrating the Call Center Order Management application transaction data along with the Store Order Management application, run the following command:

```

${ANT_HOME}/bin/ant -f ycdmigration.xml -DapplySOM=true
-Dtarget=upgrade-transaction-tables migrate -logfile
<logfile>
    
```

- The actual data migration of all transaction data present in the transaction tables are done. All new indexes required for performance are added. After migration of transaction data, transaction tables will have new columns and data.
- This command has 4 inner tasks which are performed. They are:
  - pre-transaction-migration
  - migrate-transaction-data
  - post-transaction-migration
  - apply-fc-setup for COM and COM\_Add-in
- The \*.done files created in the status folder in Release 8.0 for the task upgrade-transaction-tables are:
  - transaction\_applycomfcsetup.xml.done
  - transaction\_applysomfcsetup.xml.done
  - transaction\_Add-in\_applycomfcsetup.xml.done
  - transaction\_Add-in\_applysomfcsetup.xml.done
- The \*.done files created in the status folder in Release 7.5 for the task upgrade-transaction-tables are:
  - transaction\_applycomfcsetup.xml.done
  - transaction\_applysomfcsetup.xml.done
  - transaction\_Add-in\_applycomfcsetup.xml.done

- transaction\_Add-in\_applysomfcsetup.xml.done
- The \*.done files created in the status folder in Release 7.4 for the task upgrade-transaction-tables are:
  - transaction\_applycomfcsetup.xml.done
  - transaction\_applysomfcsetup.xml.done
  - transaction\_Add-in\_applycomfcsetup.xml.done
  - transaction\_Add-in\_applysomfcsetup.xml.done
- If you are migrating only the Call Center Order Management application transaction data, run the following command:
 

```

      ${ANT_HOME}/bin/ant -f ycdmigration.xml -DapplySOM=false
      -Dtarget=upgrade-transaction-tables migrate -logfile
      <logfile>
      
```

  - The actual data migration of all transaction data present in the transaction tables are done. All new indexes required for performance are added. After migration of transaction data, transaction tables will have new columns and data.
  - This command has 4 inner tasks which are performed. They are:
    - pre-transaction-migration
    - migrate-transaction-data
    - post-transaction-migration
    - apply-fc-setup for COM and COM\_Add-in
  - The \*.done files created in the status folder in Release 8.0 for the task upgrade-transaction-tables are:
    - transaction\_applycomfcsetup.xml.done
    - transaction\_Add-in\_applycomfcsetup.xml.done
  - The \*.done files created in the status folder Release 7.5 for the task upgrade-transaction-tables are:
    - transaction\_applycomfcsetup.xml.done
    - transaction\_Add-in\_applycomfcsetup.xml.done
  - The \*.done files created in the status folder in Release 7.4 for the task upgrade-transaction-tables are:

- `transaction_applycomfcsetup.xml.done`
- `transaction_Add-in_applycomfcsetup.xml.done`

After the tasks are completed, search for all `*.restart` files under the following directories:

- `7.4/COM/database/FactorySetup/ycd`
- `7.4/COM_Add-in/database/FactorySetup/ycd`
- `7.5/COM/database/FactorySetup/ycd`
- `7.5/COM_Add-in/database/FactorySetup/ycd`
- `8.0/COM/database/FactorySetup/ycd`
- `8.0/COM_Add-in/database/FactorySetup/ycd`

For the upgrade tasks to be successfully completed, ensure that the value of the `Completed` attribute is set to "Y" for all the tasks.

- If the value of the `Completed` attribute is set to "N" for any of the tasks, do not proceed with the upgrade. Contact Selling and Fulfillment Foundation Technical Support for assistance.

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**Note:** The transaction data migration is not performed in the activator mode. Therefore, the event handlers and pipeline conditions are not overridden.

---

---

- If you want to clear or remove all `*.restart` and `*.done` files before restarting the transaction data migration, run the following command:

```
${ANT_HOME}/bin/ant -f ycdmigration.xml  
-Dtarget=clean-up-for-rerun migrate -logfile <logfile>
```

3. 

```
${ANT_HOME}/bin/ant -f ycdmigration.xml  
-Dtarget=install-transaction-indexes -Dnonuniqueindex=Y  
migrate -logfile <logfile>
```

  - This adds all the unique and non-unique indexes. If you do not want to add the non-unique indexes, you must not pass the `-Dnonuniqueindex=Y` argument. The non-unique indexes are required for performance improvement. On a large database, non-unique indexes may take a significant amount of time for

installation. You must analyze all the non-unique indexes to check whether all of them are required to be added.

- The \*.done files created in the 8.0 status folder for the task install-transaction-indexes are:
  - transaction\_ant\_installuniqueindexes.xml.done
  - transaction\_ant\_installnonuniqueindexes.xml.done

---

---

**Note:** Check the logfile to ensure that all the indexes have been added successfully.

---

---

## 2.6 Analyzing the Sterling Call Center and Sterling Store User Interface Upgrade

During the upgrade analysis, Sterling Call Center and Sterling Store generates various reports. You can use these reports to analyze the upgrade impact.

### 2.6.1 Upgrading Hot Keys

Use the Rich Client Platform Extensibility Tool to configure user-defined hot keys or resolve hot key conflicts that may occur after completing the upgrade tasks. For more information about configuring hot keys or resolving hot key conflicts, see the *Selling and Fulfillment Foundation: Customization Guide*.

### 2.6.2 User Interface API Template Upgrade

To view the template changes between Release 7.4, 7.5 or 8.0 to Release 8.5, use the `DiffGen_YCD.html` file located in the Documentation CD under the `Upgrade_Guide/analysis/UI/template_diff` directory, or click the appropriate link in the `YCD_doc_home.html` file.

If the changes made to templates affect any custom screens, change your customized templates.

### 2.6.3 Theme Entry Upgrade Analysis

To view the theme entry changes between Release 8.0 and Release 8.5, use the `DiffGen_YCD.html` file located in the Documentation CD under

the `Upgrade_Guide/analysis/UI/theme_diff` directory, or click the appropriate link in the `YCD_doc_home.html` file.

If the changes made to theme entries affect any custom screens, remap the theme entries with the appropriate values and copy them into your customized theme file.

### 2.6.4 Bundle Entry Upgrade Analysis

To view the bundle entry changes between Release 8.0 and Release 8.5, use the `DiffGen_YCD.html` file located in the Documentation CD under the `Upgrade_Guide/analysis/UI/resources_diff` directory, or click the appropriate link in the `YCD_doc_home.html` file.

If the changes made to bundle entries affect any custom screens, remap the keys with the appropriate values and copy them into your customized property file.

### 2.6.5 Command Upgrade Analysis

In Release 8.5, the following commands have been deleted. If you have used any of these commands in Release 8.0, you will notice certain behavioral changes in the corresponding customized screens when you upgrade to Release 8.5.

- `getCurrencyList` - This command is removed from the `com.yantra.pca.ycd.rcp.tasks.customerContactManagement.screens.YCDManageContactPopup` form ID. Therefore, ensure that you have removed any customization done on this command.
- `getQueryTypeList` - This command is removed from the `com.yantra.pca.ycd.rcp.tasks.customerUserAssignment.wizardpages.YCDSelectTeamUserWizardPage` form ID. Therefore, ensure that you have removed any customization done on this command.
- `raiseEvent` - This command is removed from the `com.yantra.pca.ycd.rcp.tasks.customerPick.wizards.YCDCustomerPickWizard` form ID. Therefore, ensure that you have removed any customization done on this command.
- `checkIfUEImplemented` - This command is removed from the `com.yantra.pca.ycd.rcp.tasks.payment.screens.YCDCreditCardDetails` form ID. Therefore, ensure that you have removed any customization done on this command.

- getMonths - This command is removed from the `com.yantra.pca.ycd.rcp.tasks.payment.screens.YCDCreditCardDetails` form ID. Therefore, ensure that you have removed any customization done on this command.

## 2.6.6 Wizard Definition Upgrade Analysis

Table 2–1 describes the changes made to the wizards handling the delivery service grouping tasks.

**Table 2–1 Wizard Definition Changes**

| Form ID  | Wizard Definition Changes   |
|--|---|
| <code>com.yantra.pca.ycd.rcp.tasks.changeDeliveryAppointment.wizards.YCDChangeDeliveryAppointmentWizard</code> | The target of the <code>NewTransitionId7</code> transition has been changed from <code>DeliveryFulfillmentSummary</code> to <code>ServiceGroupingHandleRule</code> .  |
| <code>com.yantra.pca.ycd.rcp.tasks.changeShippingAddress.wizards.YCDChangeShippingAddressWizard</code>         | The target of the <code>NewTransitionId11</code> transition has been changed from <code>DFS</code> to <code>ServiceGroupingHandleRule</code> .  |
| <code>com.yantra.pca.ycd.rcp.tasks.multiAddLine.wizards.YCDMultiAddLineWizard</code>                           | The target of the <code>NewTransitionId17</code> transition has been changed from <code>ChangeDeliveryMethodSelectedRule</code> to <code>CalendarServiceGroupingRule</code> .   |
| <code>com.yantra.pca.ycd.rcp.tasks.changeDeliveryOptions.wizards.YCDChangeDeliveryOptionsWizard</code>         | <ul style="list-style-type: none"> <li>• The target of the <code>NewTransitionId23</code> transition has been changed from <code>ChangeDeliveryMethodSelectedRule</code> to <code>CalendarServiceGroupingRule</code>.</li> <li>• The target of the <code>NewTransitionId12</code> transition has been changed from <code>ValidationWorkOrdersRule</code> to <code>DFSServiceGroupingRule</code>.</li> </ul> |

**Table 2–1 Wizard Definition Changes**

| Form ID  | Wizard Definition Changes   |
|--|---|
| com.yantra.pca.ycd.rc.p.tasks.changeDeliveryInstructions.wizards.YCDChangeDeliveryInstructionsWizard | The target of the NewTransitionId7 transition has been changed from ValidationWorkOrdersRule to ServiceGroupingHandleRule.            |
| com.yantra.pca.ycd.rc.p.tasks.orderEntry.wizards.YCDOOrderEntryWizard                                | The target of the NewTransitionId27 transition has been changed from ChangeDeliveryMethodSelectedRule to CalendarServiceGroupingRule. |

Table 2–2 describes the changes made to the Order Entry wizard that handles line validations based on customer entitlement.

**Table 2–2 Wizard Definition Changes**

| Form ID   | Wizard Definition Changes   |
|---|---|
| com.yantra.pca.ycd.rc.p.tasks.orderEntry.wizards.YCDOOrderEntryWizard | <ul style="list-style-type: none"> <li>• The target of the DefTransitionFromCustSearchPage transition has been changed from YCDOOrderEntryBillingAddressRequiredRule to YCDOOrderEntryValidateOrderAfterCustomerSkippedRule.</li> <li>• The target of the YCDOOrderEntryCustomerToRule transition has been changed from YCDOOrderEntryGetSecondScreenRule to YCDOOrderEntryValidateOrderAfterCustomerSkippedRule.</li> <li>• The target of the ToPaymentScreenRule transition has been changed from YCDOOrderEntryPaymentScreenRule to YCDOOrderEntryValidateOrderAfterCustomerSkippedRule.</li> <li>• The target of the NewTransitionId23 transition has been changed from ValidateWorkOrdersRule to YCDOOrderEntryValidateOrderAfterCustomerSkippedRule.</li> </ul> |

Table 2–3 describes the changes made to the Return Entry Wizard that handles the display of customer identification tasks.

**Table 2–3 Wizard Definition Changes**

| Form ID  | Wizard Definition Changes  |
|--|--|
| com.yantra.pca.ycd.rc.p.tasks.returnEntry.wizards.YCDReturnEntryWizard | <ul style="list-style-type: none"> <li>• The transition for the YCDExchangeFulfillmentOptions wizard has been replaced with the following flow:<br/>YCDCheckCustomerOrFORule transition &gt; YCDShowCustomerScreenOrFulfillmentOptions rule &gt; ExchangeFOScreen transition.</li> <li>• From the YCDReturnEntrySetHeaderAddressWizardRule wizard rule, the YCDCreateExchange and the AdvancedLineEntryPage output values, and the ActionModel input namespace have been removed.</li> <li>• The transition for the ToExchangeFulfillmentOptions wizard has been replaced with the following flow:<br/>ToIsCFOOrCustomerScreen transition &gt; YCDShowCustomerScreenOrFulfillmentOptions rule &gt; ExchangeFOScreen transition.</li> </ul> |

### 2.6.7 Plug-ins Upgrade Analysis

In Release 8.5, no tasks have been removed.

### 2.6.8 Control Name Analysis

In Release 8.5, the following controls have been deleted or modified. If any customization has been performed on any of these controls, or any new control has been defined before and after these controls, you may have to modify the customizations performed.



**Table 2–4 Control Name Changes**

| Control Name                 | Control Type             | Form ID   |
|------------------------------|--------------------------|---|
| cmbApproverUserId            | Combo                    | com.yantra.pca.ycd.rcp.tasks.customerContactManagement.screens.YCDManageContactPopup              |
| cmbApproverProxyUserId       | Combo                    | com.yantra.pca.ycd.rcp.tasks.customerContactManagement.screens.YCDManageContactPopup              |
| txtOrganizationName          | Text                     | com.yantra.pca.ycd.rcp.tasks.customerDetails.wizardpages.YCDBusinessDetails                       |
| lblItemDescription           | Label                    | com.yantra.pca.ycd.rcp.tasks.extraItem.screens.YCDEXtraItemIdentificationDetails                  |
| lblAvailabilityInfo          | Label                    | com.yantra.pca.ycd.rcp.tasks.orderEntry.wizardpages.YCDAdvancedAddItemPage                        |
| txtTotalAmount               | Text                     | com.yantra.pca.ycd.rcp.tasks.orderSummary.wizardpages.YCDOrderSummary                             |
| txtPaymentMethodDescription  | Label                    | com.yantra.pca.ycd.rcp.tasks.payment.screens.YCDPaymentMethodLineDisplay                          |
| grpTop                       | Group                    | com.yantra.pca.ycd.rcp.tasks.alert.screens.YCDAlertDetails_ORDER_CANCEL_NOTICE                    |
| compositeStateFields         | Composite                | com.yantra.pca.ycd.rcp.tasks.common.deliveryOptions.screens.YCDChangeDeliveryOptionsPageComposite |
| pnlShipping                  | YCDShipmentPanel         | com.yantra.pca.ycd.rcp.tasks.common.fulfillmentSummary.screens.YCDFulfillmentSummaryScreen        |
| linkFulfillmentMethodAndDate | Link                     | com.yantra.pca.ycd.rcp.tasks.common.screens.shipmentDetails.YCDShipmentInvoice                    |
| pnlRoot                      | YCDOptionDialogComposite | com.yantra.pca.ycd.rcp.common.optionDialog.YRCOptionDialogComposite                               |
| txtDesc                      | Label                    | com.yantra.pca.ycd.rcp.common.optionDialog.YRCOptionDialogComposite                               |
| cmbOptions                   | Combo                    | com.yantra.pca.ycd.rcp.common.optionDialog.YRCOptionDialogComposite                               |
| pnlButtons                   | Composite                | com.yantra.pca.ycd.rcp.common.optionDialog.YRCOptionDialogComposite                               |
| btnRememberSelection         | Button                   | com.yantra.pca.ycd.rcp.common.optionDialog.YRCOptionDialogComposite                               |

**Table 2–4 Control Name Changes**

| Control Name             | Control Type                    | Form ID  |
|--------------------------|---------------------------------|--|
| itemDescriptionCmpst     | Composite                       | com.yantra.pca.ycd.rcp.tasks.extraItem.screens.YCDExtraItemIdentificationDetails |
| buttonOrderHoldIndicator | Label                           | com.yantra.pca.ycd.rcp.tasks.lineSummary.wizardpages.YCDLineSummary              |
| txtGiftInformation       | Text                            | com.yantra.pca.ycd.rcp.tasks.lineSummary.wizardpages.YCDLineSummary              |
| cmpstRelatedItems        | Composite                       | com.yantra.pca.ycd.rcp.tasks.orderEntry.wizardpages.YCDAdvancedAddItemPage       |
| deliveryMethodComposite  | Composite                       | com.yantra.pca.ycd.rcp.tasks.orderEntry.wizardpages.YCDAdvancedAddItemPage       |
| priceDetailsComposite    | Composite                       | com.yantra.pca.ycd.rcp.tasks.orderEntry.wizardpages.YCDAdvancedAddItemPage       |
| itemDetailsComposite     | Composite                       | com.yantra.pca.ycd.rcp.tasks.orderEntry.wizardpages.YCDAdvancedAddItemPage       |
| lblsubTotal              | Label                           | com.yantra.pca.ycd.rcp.tasks.orderEntry.wizardpages.YCDOrderEntryAddItemPage     |
| pnlCustomerSearchPage    | YCDCustomerSearchPage           | com.yantra.pca.ycd.rcp.tasks.orderEntry.wizardpages.YCDOrderEntryCustomerPage    |
| cmpstCheckAmount         | Composite                       | com.yantra.pca.ycd.rcp.tasks.payment.screens.YCDCheckDetails                     |
| cmpstMaxChargeLimit      | Composite                       | com.yantra.pca.ycd.rcp.tasks.payment.screens.YCDOtherPaymentMethodDetails        |
| cmpstCurrency            | Composite                       | com.yantra.pca.ycd.rcp.tasks.payment.screens.YCDPrePaidDetails                   |
| ShipmentLineComp         | YCDShipmentDetailsShipmentLines | com.yantra.pca.ycd.rcp.tasks.shipmentTracking.screens.YCDShipmentDetails         |
| locationText             | Text                            | com.yantra.pca.ycd.rcp.tasks.smcfconsole.YCDSMCFConsoleBrowser                   |
| defaultName              | Composite                       | com.yantra.pca.ycd.rcp.tasks.extraItem.screens.YCDExtraItemIdentificationDetails |

**Table 2–4 Control Name Changes**

| Control Name | Control Type | Form ID  |
|--------------|--------------|--|
| defaultName1 | Composite    | com.yantra.pca.ycd.rcp.tasks.extraltem.screens.YCDEXtraltemIdentificationDetails |
| mainCmpst    | Composite    | com.yantra.pca.ycd.rcp.tasks.extraltem.screens.YCDEXtraltemIdentificationDetails |
| labelFiller  | Label        | com.yantra.pca.ycd.rcp.tasks.itemDetails.wizardpages.YCDItemDetailsPage          |

## 2.7 Post-Migration Activities

Factory setup changes made to document type specific entities must be applied to custom document types. To apply the changes, you must provide a mapping between the custom document types and the out-of-the-box document types. To provide this mapping, perform the following steps:

1. Rename the `customdoctype.properties.sample` located in the `<INSTALL_DIR>/COM/Migration` directory as `customdoctype.properties`.
2. To modify the `customdoctype.properties` file, follow the instructions provided in the `sample` file.
3. Run the following ant script from `<INSTALL_DIR>/COM/Migration` folder.

```
<ANT_HOME>/bin/ant -f doc_migrator.xml migrate
-Dtarget=migrate-custom-doc-types -logfile <logfile>
```

This will ensure that the custom document types are updated to reflect the modification types provided for the out-of-the-box document types.

The following tables are updated during the custom document type migration:

- YFS\_Status
- YFS\_Transaction
- YFS\_Transaction\_Pickup\_Status
- YFS\_Transaction\_Drop\_Status
- YFS\_Event

- YFS\_Status\_Modification\_Type
- YFS\_Status\_Modification

After performing the migration, you need to configure Sterling Call Center and Sterling Store according to your business needs. Once the configuration is complete, perform the following steps:

1. You must regenerate the db classes if you have performed extensions on the database in earlier releases. In Release 8.5, if the user wants to extend the database further, the user must generate the db classes after extending the database. To generate the db classes, perform the following tasks:
  - a. Go to the <INSTALL\_DIR>/bin directory
  - b. Execute following task:
    - `deployer.cmd -t entitydeployer` for Windows operating systems
    - `deployer.sh -t entitydeployer` for UNIX or Linux operating systems
2. Build your `yantra.ear` file. For more information about building the `yantra.ear` file, see the *Sterling Call Center and Sterling Store: Installation Guide*.
3. Create the Client Application. For more information about creating the client application, see the *Sterling Call Center and Sterling Store: Installation Guide*.