

Sterling Call Center



# Upgrade Guide

*Release 9.2*



Sterling Call Center



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*Release 9.2*

**Note**

Before using this information and the product it supports, read the information in "Notices" on page 39.

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# Chapter 1. Performing Migration Assessment

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## Perform Migration Assessment

This topic explains the changes in Release 7.4, Release 7.5, Release 8.5, Release 9.0, or Release 9.1 to IBM® Sterling Call Center, Release 9.2. Read this topic to assess the changes required to upgrade to Sterling Call Center, Release 9.2, then follow the steps for the upgrade process.

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## Upgrade to the IBM Sterling Selling and Fulfillment Foundation, Release 9.2

Before upgrading to Sterling Call Center, Release 9.2, ensure that you have upgraded to the Sterling Selling and Fulfillment Foundation, Release 9.2 and installed the latest fix packs. The Sterling Selling and Fulfillment Foundation, Release 9.2 upgrade also performs the following upgrade tasks for Sterling Call Center:

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

For more information about upgrading to IBM Sterling Selling and Fulfillment Foundation, Release 9.2, see the *Sterling Selling and Fulfillment Foundation: Upgrade Guide*.

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## System Requirements

The system requirements for upgrading to Sterling Call Center, Release 9.2 are the same as that for upgrading to Sterling Selling and Fulfillment Foundation, Release 9.2. For more information about the system requirements, see the *Sterling Selling and Fulfillment Foundation: Upgrade Guide*.

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## Important Behavior Changes between Release 7.4 and Release 7.5

This topic explains the features that impact your User Interface, Configurator, APIs, User Exits, and so on due to migration.

### User Interface - Support for Provided Services

With the exception of the following screens, the other screens have been enhanced to handle provided service items:

- Initiate Return screens
- Create Store Return screens

### How It Affects You

None.

### Migration Strategy

None.

## **User Interface - 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.

## **User Interface - 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.

## **User Interface - 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.

## **User Interface - 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.



## Configurator - 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.

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## Important Behavior Changes between Release 7.5 and Release 8.0

This topic explains the features that impact your Sterling Call Center User Interface, Configurator, APIs, User Exits, and so on due to migration.

### User Interface - Return Enhancements

The following return tasks have been replaced with new tasks:

- 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.

### User Interface - Enhanced Price Match

The existing Price Match screens 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.

### User Interface - 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**

None.

### **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.

## **User Interface - 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, the Reset button on the Alert Search screen is hidden.

### **How It Affects You**

None.

### **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. 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.

## **User Interface - 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. 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**

None.

### **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.

## User Interface - 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.

## User Interface - 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.

## User Interface - 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.

## User Interface - 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 displayed the Item Search screen without closing the Item Details screen. In Release 8.0, clicking the Close button closes the Item Details screen. Additionally, clicking the Add to Order button or the Create Order button closes the Item Details screen.

### **How It Affects You**

None.

### **Migration Strategy**

None.

## **User Interface - Select Enterprise Pop-Up**

In Sterling Call Center Release 8.0, 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.

## **User Interface - Add Item to Order**

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.

## **User Interface - 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.

## Configurator - 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.

## Modified the `getSalesOrderDetailsWithLocalQty` API

The `getSalesOrderDetailsWithLocalQty` API has been replaced with `getCompleteOrderDetails` API.

### 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.

### Migration Strategy

None.

### Automated Migration Processes

None.

### Manual Migration Processes

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

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## Important Behavior Changes between Release 8.0 and Release 8.5

This topic explains the features that impact your Sterling Call Center User Interface, Channel Applications Manager, APIs, User Exits, and so on due to migration.

## User Interface - 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.

## **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.

## **User Interface - Add Items Screen**

The following changes have been made to the Add Items screen (check) 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.

## **User Interface - Create Order Screen**

A new field, Draft Order Name has been added to the Confirm pop-up window. This pop-up window 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.

## **User Interface - 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.

## **User Interface - 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.

## User Interface - 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.

## User Interface - Line Summary Screen

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.



## User Interface - 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.

## User Interface - 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 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 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 Messages panel.

## User Interface - Address Capture Screens

The address capture screens have been enhanced to default the City and the State names using the country or region 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 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 or region 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.

## **User Interface - Item Details Screen**

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.

## **User Interface - Enhanced Change Payment Methods Screen**

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.

## User Interface - Change Gift Options Screen

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.

## User Interface - 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.

## User Interface - 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.

## **User Interface - 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 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.

## **User Interface - Create Alert Screen**

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.

## **User Interface - Shipment Inquiry Screen**

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, 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.

## User Interface - Shipment Details Screen

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, 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.

## User Interface - Cancel Order Screen

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

## How It Affects You

None.

## Migration Strategy

To configure the cancellation reasons for a specific version of the Sterling Call Center application, define qualifiers for the common codes.

## User Interface - Manage Users Task

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.

## User Interface - Price Match Task

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.

## User Interface - Create Business Customer Screen

The Create Business Customer screen in 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.YCDBusinessCustomerEntryWiz`

page ID, which is a part of the

`com.yantra.pca.ycd.rcp.tasks.customerBusinessEntry.wizards.YCDBusinessEntryWizard`

form ID and the

`com.yantra.pca.ycd.rcp.tasks.customerBusinessEntry.wizards.YCDOOrderEntryBusinessEntryWiz`

form ID, will not be applied to the new business customer screens provided in Release 8.5.

### **Migration Strategy**

None.

## **User Interface - Add Competitor Screen**

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.

## **User Interface - Change Fulfillment Options Screen**

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.

## **User Interface - Service Fulfillment Summary Screen**

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.

## **User Interface - View or Change Service Instructions Screen**

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.

## **User Interface - Change Service Appointment Screen**

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.

## **User Interface - 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.

## **User Interface - 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.

## **User Interface - 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, 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.

## **User Interface - Alert Details Screen**

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.

## **Channel Applications Manager - Change Tax Options Screen Configuration**

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.

## **Channel Applications Manager - Item Association Configuration**

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.

## **Channel Applications Manager - country or region and State Display Rules Configuration**

The Configure country or region 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 or region 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 or region and Postal Code.

### **Migration Strategy**

None.

## **Channel Applications Manager - Display of a Product Web Page for an Item Configuration**

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.

## Channel Applications Manager - Available Gift Options Configuration

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.

## Channel Applications Manager - 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, 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.

## Channel Applications Manager - External User Interface Rules Configuration

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 8.5, 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.

## Modified YCDPromotionValidationUE User Exit

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.

## Modified the com.jar file

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 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.

## Enhanced Data Security Access

The product 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.

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

---

## **Important Behavior Changes between Release 8.5 and Release 9.0**

This topic explains the features that impact your Sterling Call Center User Interface, Channel Applications Manager, APIs, User Exits, and so on due to migration.

### **User Interface - Order Summary Screen**

If an order is being modified through a different channel, for example, Sterling Web, and the order contains unsaved changes, when this order is opened by a Sterling Call Center user, the Order Summary screen has been enhanced to validate the order and verify whether the order contains any unsaved changes. If the order contains unsaved changes, a message is displayed, indicating that the order contains unsaved changes and prompts the Sterling Call Center user to either revert the changes, or close the order. If the order does not contain any changes, the Order Summary screen is displayed, and the Sterling Call Center user can proceed with the order modifications.

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

A user is provided with an option to either revert the changes, or close the order if the order contains any unsaved changes made through a different channel.

#### **Migration Strategy**

None.

### **Channel Applications Manager - IBM Sterling Web Version Configuration**

A Define Sterling Web Version rule has been introduced to enable you to specify the version of the Sterling Web application that is associated with Sterling Call Center.

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

If you specify the version of the Sterling Web application that is associated with Sterling Call Center, the Transfer Order to Web task is displayed in the Sterling Call Center applications when a user opens a draft order that is created in the Sterling Web application.

#### **Migration Strategy**

None.

### **Channel Applications Manager - IBM Sterling Web Cart Rules Configuration**

In the Channel Applications Manager, a Configure Sterling Web Cart rules wizard has been introduced to enable you to configure the behavior of carts through the Sterling Web application.

### **How It Affects You**

None.

### **Migration Strategy**

None.

**Note:** This rule is applicable only to Sterling Web users.

## **Channel Applications Manager - IBM Sterling Web User Rules Configuration**

A Configure Sterling Web User rule has been introduced to enable you to configure the user preferences within the Sterling Web application.

### **How It Affects You**

None.

### **Migration Strategy**

None.

**Note:** This rule is applicable only to Sterling Web users.

## **Channel Applications Manager - IBM Sterling Web Categories Display Rules Configuration**

A Configure Sterling Web Categories Display rule has been introduced to enable you to configure the number of categories to be displayed in the Sterling Web application Home page.

### **How It Affects You**

None.

### **Migration Strategy**

None.

**Note:** This rule is applicable only to Sterling Web users.

## **Channel Applications Manager - IBM Sterling Web Store Display Rules Configuration**

A Configure Sterling Web Store Display rule has been introduced to enable you to configure the number of stores to be displayed in the Sterling Web application.

### **How It Affects You**

None.

## **Migration Strategy**

None.

**Note:** This rule is applicable only to Sterling Web users.

## **Channel Applications Manager - Item Search Options Configuration**

The Configure Item Search Options screen has been enhanced to enable users to search for all the items in the database or only for the items that are available in the current active search index. You can also enable the Sterling Call Center application to perform item availability checks during an item search.

### **How It Affects You**

None.

### **Migration Strategy**

None.

---

## **Important Behavior Changes between Release 9.0 and Release 9.1**

This topic explains the features that impact your Sterling Call Center User Interface, Channel Applications Manager, APIs, User Exits, and so on due to migration.

### **User Interface - Consumer Details Screen**

The Consumer Details screen has been enhanced to display an Opportunities tab and a Quote History tab. The Opportunities tab displays the list of opportunities that are created for the consumer customer and the Quote History tab displays all the quotes that are created for the consumer customer.

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

None.

#### **Migration Strategy**

None.

### **User Interface - Business Customer Details Screen**

The Business Customer Details screen has been enhanced to display an Opportunities tab and a Quote History tab. The Opportunities tab displays the list of opportunities that are created for the business customer and the Quote History tab displays all the quotes that are created for the business customer.

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

None.

#### **Migration Strategy**

None.

## **User Interface - Select Reasons for Customer Appeasement Screen**

The Select Reasons for Customer Appeasement screen has been enhanced to include a Display Customer Credentials hyperlink. Users can click this link to view a customer's credentials such as the total revenue generated by the customer for the last twelve months, total lifetime revenue generated by the customer, and the average value of the customer's order accumulated over the lifetime of the customer.

The Select Reasons for Customer Appeasement screen has been enhanced to display the customer's rating for whom the order is created. Additionally, the screen also displays the View Details hyperlink to enable users to view the metrics based on which the customer's rating is computed.

### **How It Affects You**

The Display Customer Credentials hyperlink will be displayed based on user permissions and if the order is created in the context of a customer.

In the Channel Applications Manager, if the Get Customer Grade Information From Sterling Business Intelligence rule is selected, the View Details hyperlink is displayed in the Select Reasons for Customer Appeasement screen.

In the Select Reasons for Customer Appeasement screen, the View Details hyperlink will be disabled if there is no information available to display the metrics.

### **Migration Strategy**

None.

## **User Interface - Select Offer for Customer Appeasement Screen**

The Select Offer for Customer Appeasement screen has been enhanced to include a Display Customer Credentials hyperlink. Users can click this link to view a customer's credentials such as the total revenue generated by the customer for the last twelve months, total lifetime revenue generated by the customer, and the average value of the customer's order accumulated over the lifetime of the customer.

The Select Offer for Customer Appeasement screen has been enhanced to display the customer's rating for whom the order is created. Additionally, the screen also displays the View Details hyperlink to enable users to view the metrics based on which the customer's rating is computed.

### **How It Affects You**

The Display Customer Credentials hyperlink will be displayed based on user permissions and if the order is created in the context of a customer.

In the Channel Applications Manager, if the Get Customer Grade Information From Sterling Business Intelligence rule is selected, the View Details hyperlink is displayed in the Select Offer for Customer Appeasement screen.



In the Select Reasons for Customer Appeasement screen, the View Details hyperlink will be disabled if there is no information available to display the metrics.

### **Migration Strategy**

None.

## **User Interface - Create User Team Screen**

The Create User Team screen has been enhanced to include a Customer Organization drop-down list. Users can select a customer organization to search for customers belonging to the selected customer organization. Note that the Customer Organization drop-down list is displayed only if the user has access to more than one customer master organization.

### **How It Affects You**

None.

### **Migration Strategy**

None.

## **User Interface - Return Order Summary Screen**

The Return Order Summary screen has been enhanced to display the holds applied to an order or order lines. The Return Order Lines panel has been enhanced to provide visibility to order line summary and shipment tracking information.

### **How It Affects You**

None.

### **Migration Strategy**

None.

## **User Interface - Enhancement to the Login ID Field**

In Sterling Selling and Fulfillment Foundation, if the IS\_GLOBAL\_USER rule is enabled in the Login field of the Sterling Call Center screen, users can enter only 50 characters. Otherwise, users can enter 150 characters.

### **How It Affects You**

None.

### **Migration Strategy**

None.

## **User Interface - Quick Access Screen**

In the Quick Access screen, the Enterprise drop-down list has been provided.

### **How It Affects You**

The system performs a search, for example, order search, item search, and so on for the selected enterprise.

### **Migration Strategy**

None.

## **User Interface - Return or Exchange Details Panel**

In the Return/Exchange Details panel, a new field, Can Customer Keep? has been added. This field is displayed only for return orders.

### **How It Affects You**

None.

### **Migration Strategy**

None.

---

## **Important Behavior Changes between Release 9.1 and Release 9.2**

This topic explains the features that impact your Sterling Call Center User Interface, Channel Applications Manager, APIs, User Exits, and so on due to migration.

### **User Interface - Create Order: Customer Identification Screen**

The Create Order: Customer Identification screen has been enhanced to capture the user identifier of a buyer during order creation only when the IBM Sterling Selling and Fulfillment Suite is integrated with IBM WebSphere® Commerce.

The User ID field has been added to the Customer Ship To Address panel.

### **How It Affects You**

A buyer has to provide a valid user identifier for the system to retrieve the corresponding item price or validate a coupon. Otherwise, the guest item price is displayed as the system does not validate the user identifier that is entered.

### **Migration Strategy**

In the Channel Applications Manager, ensure that the Display Address Search Screen option is selected in Configure Order Entry Rules.

### **User Interface - Create Order: Add Items Screen**

In the Channel Applications Manager, the order entry rules have been modified to display the large order entry screen by default.

- If you are creating a new order, then the large order entry screen is displayed to add items.
- If you are opening an existing order, then the existing order lines are displayed in the large order entry screen.

## How It Affects You

To fulfill orders with several order lines, it is convenient to use the advanced view.

## Migration Strategy

None.

## User Interface - Advanced Order Search Screen

In the Advanced Order Search screen, the Show only orders on Hold of Type check box with a drop-down list has been added. If a user has access to multiple enterprises, the drop-down list is not displayed. To view orders that are placed on hold by a specific hold type, select the check box and the appropriate hold type from the drop-down list. Otherwise, select only the check box. All orders that are placed on hold are displayed.

The Advanced Order Search screen also displays the Hold icons for all the orders that are placed on hold.

## How It Affects You

None.

## Migration Strategy

None.

## User Interface - Change Customer Options Screen

The Change Tax Options related task has been changed to Change Customer Options related task. The order entry flow of the following screen have been enhanced:

- In the Create Order : Customer Selection screen, the Tax Options panel has been changed to Customer Options panel. Also, the PO Number field has been provided. The customer's purchase order number is displayed only if an order is created for a business customer.
- In the Advanced Order Search screen, under the Advanced Search panel, the Customer PO # field has been added. Users can perform advanced order search based on the customer's purchase order number.
- In the Order Summary screen, under the Primary Details panel, the Customer PO # field has been added. This field is visible only if the order is created for a business customer.

## How It Affects You

None.

## Migration Strategy

None.

## **User Interface - Customer Notes Screen and Important Notes Panel**

The Customer Notes screen and the Important Notes panel have been enhanced to enable a user to modify or delete a note.

### **How It Affects You**

None.

### **Migration Strategy**

None.

## **User Interface - Customer Details Screen**

The Business Customer Details screen and the Consumer Details screen have been enhanced to display the Hold icon in the Order History tab.

### **How It Affects You**

None.

### **Migration Strategy**

None.

## **User Interface - Business Customer Details Screen**

In the Business Customer Details screen, the Order History tab has been enhanced to display the purchase order number for business customers.

### **How It Affects You**

None.

### **Migration Strategy**

None.

## **User Interface - View Shipment Details Screen**

The Shipment Details panel of the Shipment Details screen has been enhanced to display the total number of containers packed for a shipment. If the shipment has containers and if a carrier is integrated with Sterling Selling and Fulfillment Suite, two new hyperlinks, Reprint Shipping Label and Reprint Return Label are displayed. The shipping label is generated by the carrier and differs from carrier to carrier and the service provided. The pre-paid return label is provided to customers to enable them to return items, if necessary. The return label is provided by the carrier and can be printed for a container or individual items.

### **How It Affects You**

None.

### **Migration Strategy**

None.

---

## Migration Estimates

Only the factory defaults migration is involved when upgrading from Release 9.1 to Release 9.2. Therefore, the upgrade tasks complete in minimum time.



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## Chapter 2. Upgrading to Release 9.2

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### Install IBM Sterling Call Center Release 9.2

**Note:** <INSTALL\_DIR> refers to the user-supplied location of the application installation directory.

Before proceeding with the upgrade activities, ensure that you have performed the following tasks:

- 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, Release 9.2. For more information about installing the Sterling Call Center, Release 9.2, see the *Sterling Selling and Fulfillment Suite: Applications Installation Guide*.

---

### Pre-Migration Activities

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

- JAVA\_HOME
- ANT\_HOME

For more information about setting up these environment variables, see the *Sterling Selling and Fulfillment Foundation: Upgrade Guide*.

**Note:** When migrating from release 9.1 to 9.2 in a multischema environment, ensure to run the following sql scripts before upgrading:

- delete from PLT\_DB\_POOL where POOL\_ID='DEFAULT\_CONFIGURATION\_91';
- delete from PLT\_DB\_POOL where POOL\_ID='DEFAULT\_STATISTICS\_91';

---

### Allocate Memory in `ycdmigration.properties`

**Note:** <INSTALL\_DIR> refers to the user-supplied location of the application installation directory.

During the upgrade process, you can pass JVM-specific JAVA and ANT arguments in <INSTALL\_DIR>/COM/Migration/9.1/COM/ycdmigration.properties to avoid out-of-memory errors.

- mem\_java\_args\_sun=-Xms128m -Xmx1408m -XX:MaxPermSize=512m
- mem\_java\_args\_non\_sun=-Xms128m -Xmx1408m
- mem\_ant\_args\_sun=-Xms128m -Xmx1408m -XX:MaxPermSize=512m
- mem\_ant\_args\_non\_sun=-Xms128m -Xmx1408m

---

## Run the Upgrade Using NFS Mounting

**Note:** <INSTALL\_DIR> refers to the user-supplied location of the application installation directory.

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

To use NFS mounting, perform the following tasks:

1. Create a user on the database server with the user identification (UID), and group identification (GID) as the user who installed the Sterling 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, Release 9.2 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 Sterling 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.

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

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

---

## Upgrade to IBM Sterling Call Center, Release 9.2

**Note:** <INSTALL\_DIR> refers to the user-supplied location of the application installation directory.

Before performing the Sterling Call Center upgrade tasks, ensure that you have first installed the Sterling Selling and Fulfillment Foundation, Release 9.2 and then the Sterling Call Center, Release 9.2.

Before performing the Sterling Selling and Fulfillment Foundation post-migration activities, ensure to perform the Sterling Call Center, Release 9.2 upgrade tasks.

The Sterling Selling and Fulfillment Foundation, Release 9.2 upgrade performs the following upgrade tasks for Sterling Call Center:

- Alters the schema
- Copies the current customizations



**Note:** Do not perform the installPCAs task when upgrading to Sterling Call Center, Release 9.2 along with Sterling Selling and Fulfillment Foundation, Release 9.2.

**Note:** When migrating from Sterling Call Center Release 7.9 installed on Sterling Selling and Fulfillment Foundation 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 Sterling Selling and Fulfillment Foundation, Release 9.2. Here, <INSTALL\_DIR> refers to the user-supplied location of the application installation directory.

**Note:** If you are upgrading from Release 8.0 to higher versions, do not perform the pre-data migration validation. Otherwise, perform pre-data migration validation for Sterling Call Center, Release 9.1 before upgrading to Sterling Selling and Fulfillment Foundation, Release 9.2.

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## Upgrade IBM Sterling Call Center Transaction Data Migration

**Note:**

- <INSTALL\_DIR> refers to the user-supplied location of the application installation directory. This is only applicable for Release 8.0 and later.
- <INSTALL\_DIR\_OLD> refers to the user-supplied location of the application installation directory. This is applicable only for users upgrading from Release 8.0 and later.
- <YANTRA\_HOME> refers to the user-supplied location of the application installation directory. This is only applicable for Releases 7.4 and 7.5.
- <YANTRA\_HOME\_OLD> refers to the user-supplied location of the application installation directory. This is applicable only for users upgrading from Releases 7.4 and 7.5.
- <YFS\_HOME> refers to the user-supplied location of the application installation directory. This is only applicable for Releases 7.4 and 7.5.
- <YFS\_HOME\_OLD> refers to the user-supplied location of the application installation directory. This is applicable only for users upgrading from Releases 7.4 and 7.5.

To migrate the transaction data, run the following commands from the <INSTALL\_DIR>/COM/Migration/9.1/COM directory:

- If you are migrating the Sterling Call Center application transaction data:
  - When upgrading from Release 7.4, 7.5 to 9.2, 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=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, 8.5, 9.0, or 9.1 to 9.2, run the following command:

```
{ANT_HOME}/bin/ant -f ycdmigration.xml -Druntime=<INSTALL_DIR> -Druntime.old=<INSTALL_DIR_OLD> -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 performs the apply-fc-setup for COM task.
- The \*.done files created in the status folder for the task upgrade-transaction-tables are:
  - transaction\_applycomfcsetup.xml.done
  - transaction\_applysomfcsetup.xml.done

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

- 7.4/COM/database/FactorySetup/ycd
- 7.5/COM/database/FactorySetup/ycd
- 8.0/COM/database/FactorySetup/ycd
- 8.5/COM/database/FactorySetup/ycd
- 9.0/COM/database/FactorySetup/ycd
- 9.1/COM/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 Sterling Selling and Fulfillment Foundation Technical Support for assistance.

**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 9.2, 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, 8.5, 9.0, or 9.1 to 9.2, 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>
      
```

---

## Analyze the IBM Sterling Call Center User Interface Upgrade

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

### Upgrade 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 *Sterling Selling and Fulfillment Foundation: Customizing the Rich Client Platform Interface* .

## User Interface - API Template Upgrade Analysis

To view the template changes between Release 9.1 and Release 9.2, 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.

## Theme Entry Upgrade Analysis

To view the theme entry changes between Release 9.1 and Release 9.2, 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.

## Bundle Entry Upgrade Analysis

To view the bundle entry changes between Release 9.1 and Release 9.2, 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.

---

## IBM Sterling Call Center Post-Migration Activities

### About this task

The factory setup changes made to a 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 tasks:

### Procedure

**Note:** <INSTALL\_DIR> refers to the user-supplied location of the application installation directory.

1. Rename the customdoctype.properties.sample located in the <INSTALL\_DIR>/COM/Migration directory as customdoctype.properties.
2. Modify the customdoctype.properties file. To modify this 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>
```

### Results

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

---

## Configure IBM Sterling Call Center Post Migration

### About this task

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

### Procedure

**Note:** <INSTALL\_DIR> refers to the user-supplied location of the application installation directory.

1. You must regenerate the db classes if you have performed extensions on the database in earlier releases. 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 the EAR file. For more information about building the EAR file, see the *Sterling Call Center: Deployment Guide*.
3. Create the Client Application. For more information about creating the client application, see the *Sterling Call Center: Deployment Guide*.

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