Sterling Call Center and Sterling Store

IBM

Upgrade Guide

Release 9.1

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Note

Before using this information and the product it supports, read the information in "Notices" on page 41.

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This edition applies to the 9.1 Version of IBM® Sterling Selling and Fulfillment Foundation and to all subsequent releases and modifications until otherwise indicated in new editions.

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Chapter 1. Performing Migration Assessment

Perform Migration Assessment

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

The following table describes the upgrade paths available from Release 7.4, Release 7.5, Release 8.5 or Release 8.5 to Release 9.1.

Table 1. Upgrade Paths to Release 9.1

From		To		Path Followed	
Earlier Version of Sterling Selling and Fulfillment Foundation	Earlier Version of Sterling Call Center and Sterling Store	Sterling Selling and Fulfillment Foundation Version	Sterling Call Center and Sterling Store Version	Earlier Version of Sterling Selling and Fulfillment Foundation /Current Version of Sterling Selling and Fulfillment Foundation Version	Earlier Version of Sterling Call Center and Sterling Store /Current Version of Sterling Call Center and Sterling Store Version
7.9	7.4	9.1	9.1	7.9 -> 9.1	7.4 -> 9.1
7.11	7.4	9.1	9.1	7.11 -> 9.1	7.4 -> 9.1
7.11	7.5	9.1	9.1	7.11 -> 9.1	7.5 -> 9.1
8.0	8.0	9.1	9.1	8.0 -> 9.1	8.0 -> 9.1

Upgrade to the IBM Sterling Selling and Fulfillment Foundation, Release 9.1

Before upgrading to IBM Sterling Call Center and IBM Sterling Store, Release 9.1, ensure that you have upgraded to the IBM Sterling Selling and Fulfillment Foundation, Release 9.1 and installed the latest hot fix. The IBM Sterling Selling and Fulfillment Foundation, Release 9.1 upgrade also performs the following upgrade tasks for IBM Sterling Call Center and IBM 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 IBM Sterling Selling and Fulfillment Foundation, Release 9.1, see the *Sterling Selling and Fulfillment Foundation: Upgrade Guide*.

System Requirements

The system requirements for upgrading to IBM Sterling Call Center and IBM Sterling Store, Release 9.1 are the same as that for upgrading to IBM Sterling Selling and Fulfillment Foundation, Release 9.1. For more information about the system requirements, see the *Sterling Selling and Fulfillment Foundation: Upgrade Guide*.

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 reconfigure the order entry rules.

Important Behavior Changes between Release 7.5 and Release 8.0

This topic explains the features that impact your IBM Sterling Call Center and IBM Sterling Store 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, in Release 8.0, 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 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 - 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 8.5, 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 IBM 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.

User Interface - 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.

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 8.5, 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.

Important Behavior Changes between Release 8.0 and Release 8.5

This topic explains the features that impact your IBM Sterling Call Center and IBM Sterling Store 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 availablility 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

In IBM Sterling Call Center and IBM 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.

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 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.

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 IBM Sterling Call Center and IBM 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 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

In IBM Sterling Call Center and IBM 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.

User Interface - Enhanced Change Payment Methods Screen

In IBM Sterling Call Center and IBM 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.

User Interface - Change Gift Options Screen

In IBM Sterling Call Center and IBM 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.

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 IBM Sterling Call Center and IBM 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.

User Interface - Create Alert Screen

In IBM Sterling Call Center and IBM 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.

User Interface - Shipment Inquiry Screen

In IBM Sterling Call Center and IBM 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 IBM Sterling Call Center and IBM Sterling Store, Release 9.1, 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

In IBM 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 IBM Sterling Call Center and IBM 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.

User Interface - Cancel Order Screen

In IBM Sterling Call Center and IBM Sterling Store, Release 8.5, 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 IBM Sterling Call Center and IBM Sterling Store application.

How It Affects You

None.

Migration Strategy

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

User Interface - 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.

User Interface - 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.

User Interface - Create Business Customer Screen

The Create Business Customer screen displayed in Release 8.5 and earlier releases has been deprecated. In Release 9.1, 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 8.5 or earlier releases,

the
`com.yantra.pca.ycd.rcp.tasks.customerBusinessEntry.wizardpages.YCDBusinessCustomerEntryW`

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.YCDOrderEntryBusinessEntryWiz`

form ID, will not be applied to the new business customer screens provided in Release 9.1.

Migration Strategy

None.

User Interface - Add Competitor Screen

In IBM Sterling Call Center and IBM 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.

User Interface - Change Fulfillment Options Screen

In IBM Sterling Call Center and IBM 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.

User Interface - Service Fulfillment Summary Screen

In IBM Sterling Call Center and IBM 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.

User Interface - View or Change Service Instructions Screen

In IBM Sterling Call Center and IBM 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.

User Interface - Change Service Appointment Screen

In IBM Sterling Call Center and IBM 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.

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 IBM Sterling Call Center and IBM 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.

User Interface - Alert Details Screen

In IBM Sterling Call Center and IBM 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.

Channel Applications Manager - Change Tax Options Screen Configuration

In IBM Sterling Call Center and IBM 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.

Channel Applications Manager - 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.

Channel Applications Manager - Country or Region and State Display Rules Configuration

In Release 8.5, 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

In IBM Sterling Call Center and IBM 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.

Channel Applications Manager - Available Gift Options Configuration

In IBM Sterling Call Center and IBM 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.

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 IBM Sterling Call Center and IBM 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 8.5, 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

In IBM Sterling Call Center and IBM 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 8.5, 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 CDPromotionValidationUE 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.

Modified the 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 IBM Sterling Call Center and IBM 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.

Enhanced Data Security Access

In Release 8.5, IBM Sterling Call Center and IBM 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.

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 IBM Sterling Call Center and IBM Sterling Store 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, IBM Sterling Web, and the order contains unsaved changes, when this order is opened by a IBM Sterling Call Center or IBM Sterling Store 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 IBM Sterling Call Center and IBM Sterling Store 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 IBM Sterling Call Center and IBM Sterling Store 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

In IBM Sterling Call Center, Release 9.0 and IBM Sterling Store, Release 9.0, a Define IBM Sterling Web Version rule has been introduced to enable you to specify the version of the IBM Sterling Web application that is associated with IBM Sterling Call Center and IBM Sterling Store.

How It Affects You

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

Migration Strategy

None.

Channel Applications Manager - IBM Sterling Web Cart Rules Configuration

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

How It Affects You

None.

Migration Strategy

None.

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

Channel Applications Manager - IBM Sterling Web User Rules Configuration

In IBM Sterling Call Center, Release 9.0 and IBM Sterling Store, Release 9.0, a Configure IBM Sterling Web User rule has been introduced to enable you to configure the user preferences within the IBM Sterling Web application.

How It Affects You

None.

Migration Strategy

None.

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

Channel Applications Manager - IBM Sterling Web Categories Display Rules Configuration

In IBM Sterling Call Center, Release 9.0 and IBM Sterling Store, Release 9.0, a Configure IBM Sterling Web Categories Display rule has been introduced to enable you to configure the number of categories to be displayed in the IBM Sterling Web application Home page.

How It Affects You

None.

Migration Strategy

None.

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

Channel Applications Manager - IBM Sterling Web Store Display Rules Configuration

In IBM Sterling Call Center, Release 9.0 and IBM Sterling Store, Release 9.0, a Configure IBM Sterling Web Store Display rule has been introduced to enable you to configure the number of stores to be displayed in the IBM Sterling Web application.

How It Affects You

None.

Migration Strategy

None.

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

Channel Applications Manager - Item Search Options Configuration

In IBM Sterling Call Center, Release 9.0 and IBM Sterling Store, Release 9.0, 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 IBM Sterling Call Center and IBM Sterling Store 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 IBM Sterling Call Center and IBM Sterling Store 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 and Sterling Store screens, 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.

Migration Estimates

Only the factory defaults migration is involved when upgrading from Release 9.0 to Release 9.1. Therefore, the upgrade tasks complete in minimum time.

Chapter 2. Upgrading to Release 9.1

Install IBM Sterling Call Center and IBM Sterling Store Release 9.1

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 IBM Sterling Call Center and IBM Sterling Store, Release 9.1. Ensure that you select the Upgrade option while installing.

    For more information about installing the IBM Sterling Call Center and IBM Sterling Store, Release 9.1, see the Sterling Call Center and Sterling Store: *Installation Guide*.

Pre-Migration Activities

Before upgrading IBM Sterling Call Center and IBM 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 *Sterling Selling and Fulfillment Foundation: Installation Guide*.

Allocate Memory in ycdmigration.properties

During the upgrade process, you can pass JVM-specific JAVA and ANT arguments in `<INSTALL_DIR>/COM/Migration/9.0/COM_Add-in/ycdmigration.properties` and `<INSTALL_DIR>/COM/Migration/9.0/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

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 IBM 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 IBM 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 IBM Sterling Call Center and IBM Sterling Store, Release 9.1 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 IBM 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 IBM Sterling Selling and Fulfillment Foundation Administrator on the database server.

Upgrade to IBM Sterling Call Center and IBM Sterling Store, Release 9.1

Before performing the IBM Sterling Call Center and IBM Sterling Store upgrade tasks, ensure that you have first installed the IBM Sterling Selling and Fulfillment Foundation, Release 9.1 and then the IBM Sterling Call Center and IBM Sterling Store, Release 9.1.

Before performing the IBM Sterling Selling and Fulfillment Foundation post-migration activities, ensure to perform the IBM Sterling Call Center and IBM Sterling Store, Release 9.1 upgrade tasks.

The IBM Sterling Selling and Fulfillment Foundation, Release 9.1 upgrade performs the following upgrade tasks for IBM Sterling Call Center and IBM Sterling Store:

- Alters the schema
- Copies the current customizations

   Note: Do not perform the installPCAs task when upgrading to IBM Sterling Call Center and IBM Sterling Store, Release 9.1 along with IBM Sterling Selling and Fulfillment Foundation, Release 9.1.

   Note: When migrating from IBM Sterling Call Center and IBM Sterling Store Release 7.4 installed on IBM 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 IBM Sterling Selling and Fulfillment Foundation, Release 9.1.

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 IBM Sterling Call Center and IBM Sterling Store, Release 9.1 before upgrading to IBM Sterling Selling and Fulfillment Foundation, Release 9.1.

Upgrade the IBM Sterling Call Center and IBM Sterling Store Add-in

Note: If you have upgraded IBM Sterling Field Sales or IBM Sterling Web, do not perform the Application Add-in upgrade since the Application Add-in upgrade will already be performed as part of IBM Sterling Field Sales or IBM Sterling Web.

Application Add-in consists of APIs, Services, Entities, Agents, and so on which are common to IBM Sterling Call Center, IBM Sterling Store, IBM Sterling Field Sales, and IBM Sterling Web. When upgrading to IBM Sterling Call Center and IBM Sterling Store, Release 9.1, you must upgrade the Application Add-in components before upgrading the individual IBM Sterling Call Center and IBM Sterling Store components. The following sections describe the tasks that must be performed to upgrade the Application Add-in.

Pre-Data Migration Validation

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

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

To perform validation, run the following commands from the `<INSTALL_DIR>/COM/Migration/9.0/COM_Add-in` 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 Performed 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.

History Data Migration

To migrate the history data, run the following commands from the `<INSTALL_DIR>/COM/Migration/9.0/COM_Add-in` directory:
- If you are migrating the Call Center Order Management application transaction data along with the Store Order Management application:
  - When upgrading from Release 8.0, 8.5, or 9.0 to 9.1, run the following command:

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

- When upgrading from Release 7.4 or 7.5 to 9.1, 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-history-t
-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 upgrading from Release 8.0 to Release 9.1, the following tasks are performed:
  - 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 `*.restart` files are created under the `<INSTALL_DIR>/COM/Migration/ 8.0/COM/history/xmls` directory.

- If you are migrating only the Call Center Order Management application transaction data:
  - When upgrading from Release 8.0, 8.5, or 9.0 to 9.1, 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>
```

  - When upgrading from Release 7.4 or 7.5 to 9.1, 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-history-tab
-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 for the task upgrade-history-tables are:
    - `history_ant_migration.xml.done`
    - `history_ant_premigration.xml.done`
    - `history_ant_postmigration.xml.done`

  - If you are upgrading from Release 8.0 to Release 9.1, the following tasks are performed:
    - 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 *.restart files are created under the <INSTALL_DIR>/COM/Migration/ 8.0/COM/history/xmls directory.

Transaction Data Migration

To migrate the transaction data, run the following commands from the <INSTALL_DIR>/COM/Migration/9.0/COM_Add-in 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 9.1, 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, 8.5, or 9.0 to 9.1, 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_Add-in

- The *.done files created in the status folder for the task upgrade-transaction-tables are:
  - transaction_Add-in_applycomfcsetup.xml.done
  - transaction_Add-in_applysomfcsetup.xml.done

- If you are upgrading from Release 8.0 to Release 9.1, the following tasks are performed:
  - The command runs an 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 only if the customer type is 02 (Consumer Customer).

    The *.restart files are created under the <INSTALL_DIR>/COM/Migration/8.0/ COM/transaction/xmls directory.

- If you are migrating only the Call Center Order Management application transaction data:
  - When upgrading from Release 7.4, 7.5 to 9.1, 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, 8.5, or 9.0 to 9.1, 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_Add-in`
- – The `transaction_Add-in_applycomfcsetup.xml.done` file is created in the `status` folder for the upgrade-transaction-tables task
- If you are upgrading from Release 8.0 to Release 9.1, the following tasks are performed:
  - – The command runs an 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 only if the customer type is 02 (Consumer Customer).

    The `*.restart` files are created under the `<INSTALL_DIR>/COM/Migration/8.0/COM/transaction/xmls` directory.

  After the tasks are completed, search for all `*.restart` files under the following directories:
  - – `7.4/COM_Add-in/database/FactorySetup/ycd`
  - – `7.5/COM_Add-in/database/FactorySetup/ycd`
  - – `8.0/COM_Add-in/database/FactorySetup/ycd`
  - – `8.5/COM_Add-in/database/FactorySetup/ycd`
  - – `9.0/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 IBM 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 9.1, 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, or 9.0 to 9.1, 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>
```

Upgrade IBM Sterling Call Center and IBM Sterling Store Transaction Data Migration

To migrate the transaction data, run the following commands from the
<INSTALL_DIR>/COM/Migration/9.0/COM 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 9.1, 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, 8.5, or 9.0 to 9.1, 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 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`
- If you are migrating only the Call Center Order Management application transaction data:
  - When upgrading from Release 7.4, 7.5 to 9.1, 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, 8.5, or 9.0 to 9.1, 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 performs the `apply-fc-setup for COM` task.
  - The `transaction_applycomfcsetup.xml.done` file is created in the `status` folder for the upgrade-transaction-tables task.

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

  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 IBM 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 9.1, 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, or 9.0 to 9.1, 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 and IBM Sterling Store User Interface Upgrade

During the upgrade analysis, IBM Sterling Call Center and IBM Sterling Store 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 guide*.

User Interface - API Template Upgrade Analysis

To view the template changes between Release 9.0 and Release 9.1, 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 9.0 and Release 9.1, 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 9.0 and Release 9.1, 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.

Command Upgrade Analysis

In Release 9.1, no commands have been deleted.

Wizard Definition Upgrade Analysis

In Release 9.1, no changes have been made to the wizards handling the various tasks in the Sterling Call Center and Sterling Store applications.

Plug-ins Upgrade Analysis

In Release 9.1, no tasks have been removed.

Control Name Analysis

In Release 9.1, no controls have been deleted or modified.

IBM Sterling Call Center and IBM Sterling Store 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

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 and IBM Sterling Store Post Migration

About this task

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

Procedure

1. You must regenerate the db classes if you have performed extensions on the database in earlier releases. In Release 9.1, 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 and Sterling Store: Deployment Guide*.
3. Create the Client Application. For more information about creating the client application, see the *Sterling Call Center and Sterling Store: Deployment Guide*.

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