

Pega Customer Service

7.21

INSTALLATION GUIDE



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Overview

This guide describes how to install a new instance of Pega Customer Service on the Pega 7 Platform system.

To upgrade the application, see the *Pega Customer Service 7.21 Upgrade Guide*.

Prerequisites

Before you start your installation:

1. Ensure that you can start and stop your application server.
2. Install Pega 7.2 or higher and verify your installation.
3. If you have installed Pega 7.2, install the following hotfix prior to installing Pega Customer Service 7.21.
 - SE-26414
 - SE-26917

Note: Contact the Pega Support team to obtain a DL item for the required hotfixes.

Installing Pega Customer Service

The Pega Customer Service installation process is summarized as follows:

1. [Importing the application bundle](#)
2. [Creating a new Dynamic System Settings instance \(only for DB2 on z/OS installations\)](#)
3. [Installing hot fixes](#)
4. [Importing the sample database](#)

Importing the application bundle

1. Log in to the Pega 7 Platform application (<http://hostname:port/prweb/PRServlet>) using the following credentials:

User Name: administrator@pega.com
Password: install
2. If your database type is DB2 for z/OS, [create a new Dynamic System Settings instance](#).
3. Click **Designer Studio > Application > Distribution > Import**.
4. Click **Choose File** and select the file from your distribution media, for example, CustomerService_7.21\Rules\CustomerService_721.jar.
5. Click **Next** to upload the JAR file.
6. Click **Next** to import the JAR file containing rules and other objects. When the progress bar reaches 100%, it indicates that the import process is completed.
7. Verify the total error count. If there are no errors, click **Done**.
8. Resolve any errors. If you are unable to resolve them, contact Customer Support.

Creating a new Dynamic System Settings instance

Perform these steps only for DB2 on z/OS installations. You can skip this step if your database type is not DB2 for z/OS.

1. In Designer Studio, click **Application Explorer**.
2. In the **Application Explorer** menu, click **Create > SysAdmin > Dynamic System Settings**.
3. Enter the value for **Short Description**, for example, Zos dbname.
4. Enter Pega Engine in the **Owning Ruleset** field.
5. Enter prconfig/database/databases/PegaDATA/db2zos/dbname in the **Setting Purpose** field.
6. Click **Create and open**.
7. Enter the database name in the **Value** field, for example, FCP03.
8. Click **Save**.

Installing hot fixes

You can skip this step if there is no hotfix directory on your media image.

Pega Customer Service provides recent available hotfixes with the installation media. Follow the installation instructions in each hotfix zip file to import the hotfix.

Importing the sample database

Pega Customer Service provides sample database of customer information as a reference for site-specific implementations.

1. Click **Designer Studio > Application > Distribution > Import**.
2. Click **Browse** and select the following files to upload from your distribution media separately.
 - SampleDB/CSSample_DDL.jar
 - SampleDB/CSSample_DML.jar
3. After the files are uploaded, click **Next** to import them.
4. Follow the on-screen instructions to upload and import the sample database files.

Note: For a multi-tenancy sample import, ensure that CSSample_DDL.jar is imported into the shared layer and CSSample_DML.jar is imported in the tenant layer.

Verifying your installation

1. Log in to the application using the following credentials:
Operator: CACSR
Password: install
2. On your home page view, click **+New > Phone Call**.
3. In the **Search for Customer** section, enter 12345 in the **Account Number** field.
4. Click **Search**.
5. From the search results, select contact **Sara Connor** and click **Submit**.
6. In the **Contact Verification** section, select the verification check boxes and click **Submit**.
The selected customer sample data is displayed.
7. Click **Add Task > Address Change** to change the customer address.
8. In the **Address Change** section, enter the new address.
9. Click **Submit**.
10. If prompted to update address for other accounts owned by this caller, you can select the accounts and click **Submit**. The confirmation screen appears.
11. Click **Confirm**.
12. Click **Wrap Up** to complete the interaction. You can review the other suggested tasks, but this is not necessary to verify correct installation.
13. In the **Finalize the Interaction** section, click **Submit**. The CSR Interaction Portal (Home page) appears.

You have successfully validated the installation of the Pega Customer Service 7.21 application.

Note: If you encounter errors while performing the installation steps, your installation was unsuccessful. Repeat the installation steps.