Pega Customer Service and Pega Sales Automation

Installation Guide

For Pega Customer Relationship Management

7.4

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Feedback

If you have suggestions or comments for how we can improve our materials, send an email to AppDocBug@pega.com.

Contents

Prerequisites

Pega Customer Relationship Management is a product suite that includes Pega Customer Service and Pega Sales Automation. Pegasystems provides a single installer for both applications, but each application is licensed separately.

Note: If you purchase licenses for both Pega Customer Service and Pega Sales Automation, you can enable both applications in one installation.

Before you install Pega Customer Relationship Management, make sure that you complete all of the following tasks:

1. Review the database policies and application permissions that are used by your Pega Platform installation. Determine whether the application is permitted to update the database automatically or if you must generate the database scripts that your organization will use to manually make schema changes.
2. Install Pega Platform 7.4 or higher and then verify your installation as described in the Pega Platform Installation Guide for your application server.
3. Review the language packs applicable to your product.
4. Apply any required hotfixes to the Pega Platform before proceeding with the Pega Customer Relationship Management application installation. For a list of required hotfixes for Pega Platform, see the Customer Relationship Management Hotfix page.
5. Update the Pega Platform online help to the latest version from the Online Help Files section on the Pega Platform Update page. After you download the latest prhelp.war file, deploy it in your Pega Platform installation before continuing. For deployment information, see the Pega Platform Installation Guide for your application server.

Backing up your system

Back up the database, your application files, and Pega Platform in case you need to restore your system.

Note: The deployment process modifies both the data schema and the rules schema. Use a backup procedure that preserves both schemas.

1. Verify that all rules are checked in.
2. Shut down the Pega Platform application server.
3. Use your database utilities to complete an offline back up of the Pega database.
4. Back up the configuration and environment files. If you edited any of the following Pega Platform configuration files in the APP- INF\classes directory of an EAR deployment or the WEB-INF\classes directory of a WAR deployment, include these files in the backup:
   - **`prbootstrap.properties`**
   - **`prconfig.xml`**
   - logging file: **`prlogging.xml`** or **`prlog4j2.xml`**
   - **`web.xml`**
   - **`pegarules.keyring`** or any other .keyring files
5. Back up any third-party or custom JAR files that you installed. Redeploying the Pega Platform applications might delete these from your application server.

Installing the application

Follow these steps to install the application.

1. Importing the Application Bundle
2. Optional: Importing sample data
3. Optional: Enabling sample operator accounts

Importing the Application Bundle

The system data and rulesets for Pega Customer Relationship Management are loaded during this step.

1. Log in to the Pega Platform (`https://`*<hostname>*`:`*<port>*`/prweb`) by entering the administrative ID that you set up when you installed Pega Platform, such as `administrator@pega.com`, and the password that you specified.
2. To open the **Import wizard**, click **Designer Studio > Application > Distribution > Import**.
3. Click **Choose File**, browse for the **Rules\PegaCRM_74.jar** file on your distribution media, click **Next**, and follow the wizard instructions.

   Select the **Enable advanced mode to provide more granular control over the import process** check box.

   The advanced mode of the wizard identifies differences between the database schema of your current system and the schema of Pega Customer Relationship Management 7.4, provides a list of the data instances that are in Pega Customer Relationship Management 7.4, and allows your administrator to add or update data instances, as needed.
4. Based on the review of the database policies and application permissions that are used by your Pega Platform installation (Prerequisites), perform one of the given steps and click **Next**.
   - To select all the default options that come with the latest version, select the **Automatic** check box and complete the wizard.
   - To choose the rules that you want to include in your application, select **Manual** and complete the following steps manually.

   a) Click **View/Download DDL SQL**, which produces a text file containing Data Definition Language (DDL) statements for the needed changes.

   b) Save the DDL file and deliver it to a database administrator to make the required changes.

   Depending on your organization's policies, database administrators might need to review these DDL files to determine what changes will occur prior to applying the DDL to your database.

   c) After the database administrator has applied the DDL, repeat the Import wizard steps.

   If there are errors that you cannot resolve, post your questions to the Pega Product Support Community.

   Note: When you import the **Rules\PegaCRM_74.jar** file in the advanced mode, a **Ruleset Dependencies** screen is displayed. You can ignore the ruleset dependencies shown on the screen because they do not have any impact on the design-time or run-time behavior of the application.
5. Optional: For best performance and initial user experience, run the Static Assembler utility to pre-assemble the rules in the application. For more information, see Preassembling rules in an application by using the Static Assembler utility.

6. Apply any required hotfixes. For the list of required Pega Customer Relationship Management hotfixes, see the Customer Relationship Management Hotfix page.
7. In the **Explorer** panel, click **Records** > **Application Definition** > **Application** and verify that the appropriate application rule appears in the list:

For Customer Service:

You will find the `CustomerService 07.40` application rule

For Sales Automation:

You will find the `SalesAutomation 07.40` application rule

You create other operator accounts when you build your application during implementation. For additional information, see the *Pega Customer Relationship Management Implementation Guide* on the Pega Customer Relationship Management product page.

Optional: Importing sample data

For your convenience Pega Customer Relationship Management includes a set of sample operators and sample customer data to help you explore the default application capabilities. You must import the following two files to use the sample customer data and sample operators:

- **SampleDB/PegaCRMSample_DDL.jar**
- **`SampleDB/PegaCRMSample_DML.jar`**

1. To open the **Import wizard**, click **Designer Studio** > **Application** > **Distribution** > **Import**.
2. Click **Browse** and select each file to upload.
3. Follow the instructions to upload and import the two sample database files.

Note: For a multi-tenancy sample import, ensure that **`SampleDB/PegaCRMSample_DDL.jar`** file is imported in the shared layer and **`SampleDB/PegaCRMSample_DML.jar`** file is imported in the tenant layer.

Optional: Enabling sample operator accounts

The operations that you can perform in Pega applications are based on a user's operator role. After you install the Pega Customer Relationship Management sample application and enable the Pega-provided sample operator accounts, you can explore the default application capabilities.

For additional information, see Enabling operators.

1. Logged on as **administrator@pega.com**, click **Designer Studio** > **Org & Security** > **Authentication** > **Operator access**.
2. In the **Disabled operators** section, select the check box next to each Pega-provided sample operator that you want to enable, and click **Enable selected**.
3. In the confirmation dialog that is displayed, click **Submit**.
4. In the **Enable Operator** window, copy the sample operators' temporary passwords and communicate them to those who will be using them, following your organization's security best practices, and click **OK**.

   When you subsequently log on with this sample operator role the first time, use the temporary password that you recorded. You will be prompted to reset your password.
5. Click **OK**.