Sterling Commerce
An IBM Company

# Sterling Distributed Order Management: Configuration Guide

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## Index

# Preface

This manual describes how to use the Distributed Order Management business application module in the Applications Manager.

## Intended Audience

This manual is intended for use by system administrators and managers who need to configure the Selling and Fulfillment Foundation rules and business processes as they pertain to their distributed order management business practices.

## Structure

This manual contains the following sections:

### Chapter 1, "Introduction"

This chapter briefly describes the contents of this guide.

### Chapter 2, "Navigating the Applications Manager"

This chapter explains the layout of the Applications Manager, the actions you can perform throughout the solution, and the important concepts you should be aware of before using the solution.

### Chapter 3, "Configuring Cross-Application Order Promising Components"

This chapter explains how you can define the rules and components necessary to determine the appropriate node and suppliers used to source items.

### Chapter 4, "Configuring Cross-Application Service Execution Components"

This chapter explains how you can define the components utilized during service execution.

### Chapter 5, "Configuring Cross-Application Logistics Components"

This chapter explains the configuration of components used by different logistics related functionality throughout the business application module.

### Chapter 6, "Configuring Cross-Application Payment Components"

This chapter explains the configuration of components used in Selling and Fulfillment Foundation to define the types of payment the system accepts and the rules surrounding payment collection.

### Chapter 7, "Configuring Cross-Application Pricing Components"

This chapter explains how you can configure the components used for pricing by the Selling and Fulfillment Foundation financial engine throughout the Distributed Order Management business application module.

### Chapter 8, "Configuring Cross-Application Customer Components"

This chapter explains how you can configure customer classifications and customer definitions.

### Chapter 9, "Configuring a Document's Attributes"

This chapter explains how you can configure common codes as they pertain to order documents viewed in the Application Consoles.

### Chapter 10, "Configuring a Document's Order Validation"

This chapter explains how you can define configuration for defaulting Seller and Buyer validation during order creation for a particular Enterprise and document type.

### Chapter 11, "Configuring a Document's Instruction Types"

This chapter explains how you can define the common codes used when adding special instructions to an order document.

### Chapter 12, "Configuring a Document's Modification Reasons"

This chapter explains how you can define common codes for modification reasons.

### Chapter 13, "Configuring a Document's Backorder Reasons"

This chapter explains how you can define common codes for backorder reasons.

### Chapter 14, "Configuring a Document's Note Reasons"

This chapter explains how you can configure common codes for note reasons used when modifying an order.

### Chapter 15, "Configuring a Quote Document's Approval Rule Violation Reason"

This chapter explains how you can define common codes for reasons why an approval rule is violated when approving a quote.

### Chapter 16, "Configuring a Document's Line Relationship Type"

This chapter explains how you can configure line relationship types used for linking similar items.

### Chapter 17, "Configuring an Opportunity Document's Lead Origin"

This chapter explains how you can define common codes for the lead origin of opportunities.

### Chapter 18, "Configuring an Opportunity Document's Lost Reason"

This chapter explains how you can define common codes for lost reasons when an opportunity is lost.

### Chapter 19, "Configuring a Document's Modification Components"

This chapter explains how you can configure the modification rules and types of a document when it is in a specific status.

### Chapter 20, "Configuring an Order Document's Fulfillment-Specific Components"

This chapter explains how you can configure the fulfillment specific process types used by each order document.

### Chapter 21, "Configuring an Opportunity Document's Fulfillment-Specific Components"

This chapter explains how you can configure the fulfillment specific process type used by an Opportunity document.

### Chapter 22, "Configuring an Order Document's Shipment-Specific Components"

This chapter explains how you can configure the shipment specific process types used by each order document.

### Chapter 23, "Configuring a Document's Financial Components"

This chapter explains how you can define rules and common codes as they pertain to payments and charges given for a given order document.

### Chapter 24, "Configuring a Document's Purge Criteria"

This chapter explains the purge criteria business rules that are used to define qualifications around each type of purge. Purges are the process by which old data is removed from the system database.

### Chapter 25, "Configuring Value-Added Services"

This chapter explains how you can configure value-added services in Selling and Fulfillment Foundation.

### Appendix A, "Time-Triggered Transaction Reference"

This chapter explains time-triggered transactions that are utilities that perform a variety of individual functions, automatically and at specific time intervals.

### Appendix B, "Order Modification Types"

This chapter explains the default order modification types and their associated modification levels.

### Appendix C, "Condition Builder Attributes"

This chapter explains the attributes used in the condition builder to build statements for each process type.

# Selling and Fulfillment Foundation Documentation

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

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

- *Selling and Fulfillment Foundation: Integration Guide*
- *Selling and Fulfillment Foundation: Product Concepts Guide*
- *Sterling Warehouse Management™ System: Concepts Guide*
- *Selling and Fulfillment Foundation: Application Platform Configuration Guide*
- *Sterling Distributed Order Management™: Configuration Guide*
- *Sterling Supply Collaboration: Configuration Guide*
- *Sterling Global Inventory Visibility™: Configuration Guide*
- *Catalog Management™: Configuration Guide*
- *Sterling Logistics Management: Configuration Guide*
- *Sterling Reverse Logistics™: Configuration Guide*
- *Sterling Warehouse Management System: Configuration Guide*
- *Selling and Fulfillment Foundation: Application Platform User Guide*
- *Sterling Distributed Order Management: User Guide*
- *Sterling Supply Collaboration: User Guide*
- *Sterling Global Inventory Visibility: User Guide*
- *Sterling Logistics Management: User Guide*
- *Sterling Reverse Logistics: User Guide*
- *Sterling Warehouse Management System: User Guide*
- *Selling and Fulfillment Foundation: Mobile Application User Guide*
- *Selling and Fulfillment Foundation: Business Intelligence Guide*
- *Selling and Fulfillment Foundation: Javadocs*
- *Sterling Selling and Fulfillment Suite™: Glossary*
- *Parcel Carrier: Adapter Guide*
- *Visual Modeler™: Application Guide*
- *Selling and Fulfillment Foundation: Multitenant Enterprise Guide*
- *Selling and Fulfillment Foundation: Password Policy Management Guide*

- *Selling and Fulfillment Foundation: Properties Guide*
- *Catalog Management: Concepts Guide*
- *Selling and Fulfillment Foundation: Pricing Concepts Guide*
- *Selling and Fulfillment Foundation: Setting Up Quotes*
- *Sterling Sensitive Data Capture Server, Release 1.0: Configuration Guide*
- *Sterling Sensitive Data Capture Server, Release 1.0: PA-DSS Implementation Guide*
- *Selling and Fulfillment Foundation: Secure Deployment Guide*
- *Business Center: Item Administration Guide*
- *Business Center: Pricing Administration Guide*
- *Business Center: Customization Guide*
- *Business Center: Localization Guide*

# Conventions

The following conventions may be used in this manual:

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

| Convention | Meaning |
|---|---|
| <INSTALL_DIR_OLD> | User-supplied location of the Selling and Fulfillment Foundation installation directory (for Release 8.0 and later).<br>**Note:** This is applicable only for users upgrading from Release 8.0 and later. |
| <SSDCS_DIR> | User-supplied location of the Sterling Sensitive Data Capture Server installation directory.<br>This is applicable for Selling and Fulfillment Foundation, Release 9.0 and later. |
| <YANTRA_HOME> | User-supplied location of the Sterling Supply Chain Applications installation directory. This is only applicable for Releases 7.7, 7.9, and 7.11. |
| <YANTRA_HOME_OLD> | User-supplied location of the Sterling Supply Chain Applications installation directory (for Releases 7.7, 7.9, or 7.11).<br>**Note:** This is applicable only for users upgrading from Releases 7.7, 7.9, or 7.11. |
| <YFS_HOME> | For Releases 7.3, 7.5, and 7.5 SP1, this is the user-supplied location of the Sterling Supply Chain Applications installation directory.<br>For Releases 7.7, 7.9, and 7.11, this is the user-supplied location of the `<YANTRA_HOME>/Runtime` directory.<br>For Release 8.0 and later, the `<YANTRA_HOME>/Runtime` directory is no longer used and has been substituted with the location `<INSTALL_DIR>`. |
| <YFS_HOME_OLD> | This is the `<YANTRA_HOME>/Runtime` directory for Releases 7.7, 7.9, or 7.11.<br>**Note:** This is only applicable for users upgrading from Releases 7.7, 7.9, or 7.11. |
| <ANALYTICS_HOME> | User-supplied location of the Sterling Analytics installation directory.<br>**Note:** This convention is used only in the *Selling and Fulfillment Foundation: Business Intelligence Guide*. |

| Convention | Meaning |
|---|---|
| <COGNOS_HOME> | User-supplied location of the IBM Cognos 8 Business Intelligence installation directory.<br>**Note:** This convention is used only in the *Selling and Fulfillment Foundation: Business Intelligence Guide*. |
| <MQ_JAVA_INSTALL_PATH> | User-supplied location of the IBM WebSphere® MQ Java components installation directory.<br>**Note:** This convention is used only in the *Selling and Fulfillment Foundation: System Management and Administration Guide*. |
| <DB> | Refers to Oracle®, IBM DB2®, or Microsoft SQL Server® depending on the database server. |
| <DB_TYPE> | Depending on the database used, considers the value oracle, db2, or sqlserver. |

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

- Yantra is used for Release 7.7 and earlier.
- Sterling Supply Chain Applications is used for Releases 7.9 and 7.11.
- Sterling Multi-Channel Fulfillment Solution is used for Releases 8.0 and 8.2.
- Selling and Fulfillment Foundation is used for Releases 8.5 and 9.0.

# 1

# Introduction

This book concentrates on the rules and setup configurations that make up the Distributed Order Management business application in the Applications Manager. This book is intended for both Hub and Enterprise administrators using the Applications Manager to set up the Selling and Fulfillment Foundation environment. Business analysts should also use this book to plan appropriate business practices as they pertain to Selling and Fulfillment Foundation. Programmers and System Integrators should refer to the *Selling and Fulfillment Foundation: Extending Transactions Guide*and the *Selling and Fulfillment Foundation: Integration Guide* for information about extending or integrating external applications with Selling and Fulfillment Foundation.

> **Important:** This book assumes that you have read and are familiar with the concepts and business functionality detailed in the *Selling and Fulfillment Foundation: Product Concepts Guide*.

The Applications Manager is a collection of all the rules and setup configurations necessary to implement Selling and Fulfillment Foundation organized so that configuration can be done for each business application separately. The following business applications can be configured within the Applications Manager:

- Distributed Order Management
- Global Inventory Visibility
- Catalog Management
- Logistics Management

- Supply Collaboration
- Reverse Logistics
- Warehouse Management
- Application Platform

# 1.1 Business Models

There is no single business model that encompasses the environment in which the entire Selling and Fulfillment Foundation can be used. Therefore, there is no single way to configure your Selling and Fulfillment Foundation environment.

For example, your company might be considered a multi-divisional corporation, a third-party logistics company, or a marketplace business. Each of these business models require a different conceptual approach to the Selling and Fulfillment Foundation configuration.

## 1.1.1 Multi-Divisional Corporation

The **multi-divisional corporation model** is a business corporation whose primary focus is managing purchase and sales activities. A typical multi-divisional corporation can be a buyer, a seller, or both. It could also be a retailer, a manufacturer, or both. Whatever form the multi-divisional corporation takes, it normally has multiple channels with different types of customers, such as, consumers, retailers, dealers, and original equipment manufacturers.

In the multi-divisional corporation model, each division might be set up as an Enterprise in Selling and Fulfillment Foundation. This setup allows both segregation of transactions by division and global visibility at the corporate level. Each Enterprise configures their own business rules, workflow, and transaction processing.

## 1.1.2 Third-Party Logistics

Traditional **third-party logistics** companies provide a range of out sourced services such as warehousing, transportation, and contract manufacturing.

Large companies can gain the competitive advantage through the real-time management of their supply chains. These advantages include

lower costs and improved customer service. Additionally, new sales channels such as web stores, hand-held devices, and in-store kiosks provide companies new methods of reaching their customers. All of these issues have increased the complexity of the fulfillment process.

Selling and Fulfillment Foundation provides the engine needed to run the operations of a contract fulfillment provider as well as a centralized system for real-time order execution and event driven problem solving for an entire fulfillment network. It enables fulfillment providers to configure the fulfillment process to meet the needs of their clients.

In the third-party logistics model, each client might be set up as an Enterprise. This setup allows the third-party logistics Hub to have visibility of all transactions in the Hub environment, while the clients that are set up as Enterprises only have visibility to their own transactions. This allows the third-party logistics business to provide unique transaction processing to its clients.

### 1.1.3 Marketplace

A **marketplace** is an online intermediary that connects Buyers and Sellers. Marketplaces eliminate inefficiencies by aggregating offerings from many Sellers or by matching Buyers and Sellers in an exchange or auction. For Buyers, they lower purchasing costs and help them reach new Sellers. For Sellers, they lower sales costs and give them access to new customers. It is a central location, or Hub, where a trusted intermediary integrates both procedures and technology to lower the costs and enhance the effectiveness of Buyer and Seller transactions.

In the marketplace model, each market might be set up as an Enterprise. This setup allows each market to be unique with their own product or service handling.

## 1.2 Sterling Distributed Order Management Configuration

Sterling Distributed Order Management provides configurable business rules and workflow used to automate the manual processes associated with managing fulfillment in an extended supply chain. Sterling Distributed Order Management addresses the entire order process from order creation to settlement. Each order line can easily follow a unique process based upon any order-related attribute or business rule. It

automatically creates and tracks any processes that result from, or depend upon, the original customer order.

In the Applications Manager, you can use Sterling Distributed Order Management configuration grouping to establish both cross-application and order document specific rules and attributes. Cross-application rules and attributes can impact other applications, such as Supply Collaboration or Reverse Logistics. Order document specific rules and attributes pertain only to the order document type you are configuring, such as Sales Order or Transfer Order. You can define different configurations for individual order document types without impacting other applications or order document types.

You can use the Distributed Order Management configuration grouping to configure the following aspects of Selling and Fulfillment Foundation for your business application modules:

- Sourcing Setup
- Logistics
- Financials
- Customer
- Order Attributes
- Order Validation
- Instruction Types
- Modification Reasons
- Backorder Reasons
- Process Type Configuration
- Purge Criteria

## 1.2.1 Sourcing Setup

Sourcing is the process of determining what node should be used to ship or provide product, delivery service, and provided service items.

You can define the rules and components necessary to determine the appropriate node and suppliers used to source items. These rules and components are used when there are multiple nodes and suppliers from which you can source items and services.

For more information about Sourcing Setup, see Chapter 3, "Configuring Cross-Application Order Promising Components".

### 1.2.2 Logistics

You can configure the components used by different logistics related functionality throughout the Distributed Order Management business application module.

For more information about Logistics, see Chapter 5, "Configuring Cross-Application Logistics Components".

### 1.2.3 Financials

You can configure the components used by the Selling and Fulfillment Foundation financial engine throughout the Distributed Order Management business application module.

For more information about Financials, see Chapter 7, "Configuring Cross-Application Pricing Components" and Chapter 23, "Configuring a Document's Financial Components".

### 1.2.4 Customer

You can define the customers that buy from an organization in the Distributed Order Management module.

For more information about Customer, see Chapter 8, "Configuring Cross-Application Customer Components".

### 1.2.5 Order Attributes

**You can** define common codes as they pertain to order documents viewed in the Application Consoles.

For more information about Order Attributes, see Chapter 9, "Configuring a Document's Attributes".

### 1.2.6 Order Validation

You can define configuration for validating certain aspects of an order during order document creation.

For more information about Order Validation, see Chapter 10, "Configuring a Document's Order Validation".

### 1.2.7 Instruction Types

You can define the common codes used when adding special instructions to an order document.

For more information about instruction types, see Chapter 11, "Configuring a Document's Instruction Types".

### 1.2.8 Modification Reasons

You can define common codes for **modification reasons**. These codes define why a modification was made by a user.

For more information about Modification Reasons, see Chapter 12, "Configuring a Document's Modification Reasons".

### 1.2.9 Backorder Reasons

You can define common codes for **backorder reasons**. These codes describe why an order document was backordered.

For more information about Backorder Reasons, see Chapter 13, "Configuring a Document's Backorder Reasons".

### 1.2.10 Process Type Configuration

To complete an order document's lifecycle, each document has a set of different processes that it can go through. These processes are called process types. Every order document has a defined set of process types in Selling and Fulfillment Foundation.

The following process types are defined in Selling and Fulfillment Foundation for the order document types:

- Fulfillment
- Negotiation

- Shipment
- Receipt

You can configure the rules and components that define an order document's process types.

For more about Process Type Configuration, see Chapter 20, "Configuring an Order Document's Fulfillment-Specific Components" and Chapter 22, "Configuring an Order Document's Shipment-Specific Components".

### 1.2.11 Purge Criteria

You can define the parameters used when purging order document related records from the system.

For more information about Purge Criteria, see Chapter 24, "Configuring a Document's Purge Criteria".

# 2

# Navigating the Applications Manager

This chapter discusses the layout of the Applications Manager, actions you can perform throughout the application, and important concepts you should be aware of before using the application.

## 2.1 Starting the Applications Manager

To access the Applications Manager:

1. Point your browser to
   `http://<hostname>:<portname>/smcfs/console/start.jsp`

   where,

   - `hostname` is the computer name or IP address of the computer where Selling and Fulfillment Foundation is installed.
   - `portnumber` is the listening port of the computer where Selling and Fulfillment Foundation is installed.

   The browser displays the Sign In window.
2. Enter your login ID and password and choose the Sign In button. The Console Home Page is displayed.
3. From the menu bar, choose Configuration > Launch Configurator. The Applications Manager opens in a new window.

**Note:** Additionally, enterprise users who maintain an enterprise can access the Applications Manager by means of `http://<Selling and Fulfillment Foundation installation server>/smcfs/console/login.jsp`.

**Note:** If both the Applications Manager and the monitor in the System Management Console are opened at the same time, and if a dialogue window is opened in either application, the other stops responding to user input until that dialogue window is closed. This is due to a bug in the Java platform.

## 2.2 The Applications Manager Layout

The Applications Manager is a graphical user interface that can be used to configure different aspects of Selling and Fulfillment Foundation. The different configurations are defined by logical groupings called applications that can be accessed from the Configurator's menu bar.

***Figure 2–1 Applications Menu***

Each application focuses on a particular aspect of Selling and Fulfillment Foundation and contains all of the rules, common codes, and settings necessary for Selling and Fulfillment Foundation to work in a real-world business setting.

The following applications can be configured in this version of Selling and Fulfillment Foundation:

- Distributed Order Management
- Global Inventory Visibility
- Catalog Management
- Logistics Management
- Supply Collaboration
- Reverse Logistics
- Warehouse Management
- Application Platform

When you select the application that you want to configure, the Configurator displays a side panel containing all of the available configuration rules for the selected application and a work area in which these rules can be configured.

*Figure 2–2 The Standard Configurator Application Interface*

## 2.2.1 Application Rules Side Panel

The application rules side panel displays a hierarchical tree of elements specific to processes used with in the application.

*Figure 2–3 Example of Application Rules Side Panel*

The application rules side panel also identifies the organization you are configuring rules for and what, if any, rules are inherited from another organization.

You can use the application rules side panel for:

- Accessing Configuration Screens
- Determining Inheritance
- Loading Another Organization's Rules

### 2.2.1.1 Accessing Configuration Screens

The main purpose of the application rules side panel is to provide an interface to access the application's individual configuration screens. To access a configuration screen, browse through the application tree and double-click on the applicable configuration element, the element's configuration screen displays in the work area.

### 2.2.1.2 Determining Inheritance

In Selling and Fulfillment Foundation, when an Enterprise is created it can inherit all or part of an existing Enterprise's configuration rules. This inheritance is done at the configuration group level. A configuration group is a classification of similar configuration elements. For example, all of the rules and configurations dealing with items are grouped together into one configuration group and all of the rules and configurations dealing with organizations are grouped into another.

An administrator organization is set for every organization defined within the system. Only the administrator organization can modify the rules defined for a particular organization. If a particular organization administers multiple organizations, then they can load the rules of organization that it administers within the application tree. For more information about loading another organization's rules, see Section 2.2.1.3, "Loading Another Organization's Rules".

Configuration groups are associated with organization levels. Organization levels determine how configuration groups are inherited and which organizations can maintain them. The organization levels defined in Selling and Fulfillment Foundation are:

- Hub Level - Configuration groups that are associated with the Hub organization
- Enterprise Level - Configuration groups that are associated with the individual Enterprise organizations within the Hub environment
- Catalog Organization - Configuration groups that are associated with the organization(s) that maintains the catalog(s) within the Hub environment
- Inventory Organization - Configuration groups that are associated with the organization(s) that maintains the inventory within the Hub environment
- Pricing Organization - Configuration groups that are associated with the organization(s) that maintains the pricing within the Hub environment
- Organization - Configuration groups that are associated with any organization within the Hub environment

**Note:** The Configurator does not load configuration data and permissions based on Data Access Policies that are described in the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

## Enhanced Inheritance for Process Models

An Enterprise can inherit the configurations of the following entities from other Enterprises:

- Pipelines
- User Exits
- Services
- Actions
- Conditions
- Statuses
- Transactions
- Events

When an Enterprise inherits these entities from some other Enterprise, the current Enterprise can view the configurations that are inherited from all other Enterprises (including the Hub) in the inheritance hierarchy. In addition, the current Enterprise can view the configurations that are defined for the Hub.

For example, consider the following inheritance hierarchy:

In this hierarchy, Enterprise E1 is inheriting from Enterprise E2, which in turn is inheriting from Enterprise E3. Enterprise E1 can view the configurations that are defined for Enterprise E2 and Enterprise E3. In addition, Enterprise E1 can view the configurations that are defined for the Hub.

The following table details the rules used to determine which organizations can maintain a configuration group as defined by the organization level. The table also describes the rules that determine how configuration groups are inherited when an organization is created.

***Table 2–1 Organization Level Rules***

| Organization Level | Organizations That Can Modify at this Level... | Inheritance Details |
|---|---|---|
| Hub Level | Only the Hub organization can modify configuration groups at the Hub level. All other organizations have read-only access. | All organizations share this information. |
| Enterprise Level | Only Enterprise organizations can modify configuration groups at the Enterprise level.<br>Any business transaction requiring Enterprise configuration is picked up from the Enterprise established by the transactional context. For example, order documents have a specific Enterprise. | An Enterprise can inherit this configuration from another Enterprise. Additionally, this configuration can be overridden at a configuration group level. |
| Catalog Organization | Organizations that are designated as catalog organizations can modify configuration groups at the catalog organization level. | None. |
| Inventory Organization | Organizations that are designated as inventory organizations can modify configuration groups at the inventory organization level. | None. |
| Pricing Organizations | Organizations that are designated as pricing organizations can modify configuration groups at the pricing organization level. | None. |
| Organization | Any organization assigned a role (Seller, Buyer, etc.) can modify configuration groups at the organization level. | None. |

**Important:** You cannot inherit from an Enterprise that does not have the same inventory, capacity, and catalog organizations as the organization you are configuring.

The application rules side panel displays rules that have been inherited as grayed out.

***Figure 2–4 Inherited Rules in the Application Rules Side Panel***

As stated in the table above, depending on the organization you are logged in as, you may be able to override some inherited rules. If a rule can be overridden, the Override Configuration icon becomes available in the application rule side panel when you highlight the rule.

***Figure 2–5 Override Configuration Icon***

**Override Configuration Icon is Available**

When you choose to override a rule you also override any other rules in the configuration group the rule you are overriding is associated with. When you choose the Override Configuration icon the Configuration Override Details pop-up window displays. This window provides the list of rules that are overridden.

***Figure 2–6 Example of Configuration Override Details Pop-Up Window***

If you override a configuration group and then decide to "re-inherit" the original rules, you can choose the Give Back Configuration Ownership icon. This icon becomes available in the application rules side panel for rules that have been overridden.

*Figure 2–7 Give Back Configuration Ownership Icon*

When you select the Give Back Configuration Ownership Icon, the Configuration Override Details pop-up window displays. This window provides the list of rules that are re-inherited.

**Important:** If you select the Delete Rules field on the Configuration Override Details pop-up window, you give back rule ownership to the organization you originally inherited from, however you do not retain any of the rules that you inherited from them.

If you do not select this field, you give back rule ownership to the organization you originally inherited from, but you retain the rules that you inherited from them.

### 2.2.1.3 Loading Another Organization's Rules

An administrator organization is set for every organization defined within the system. Only the administrator organization can modify the rules defined for a particular organization. If a particular organization administers multiple organizations, then they can load the rules of organization that it administers within the application tree. See Table 2–1 for the rules that determine which organizations you can administer.

**Note:** The rules that are available from the tree in the application rules side panel may vary depending on the type of organization you select and the roles it has been assigned.

To load another organization's rules:

1. From the applicable application rules side panel, choose . The Load Organizations for Configuration pop-up window displays.

2. From Organization, select the organization that you want to work with.
3. Choose OK. The organization's rules display in the application rules side panel.

**Note:** The application rules side panel displays the organization you are working with in parentheses.

## 2.2.2 Work Area

The work area is the main area in which different configurationscreens appear. The following are the main types of screens that you can be seen in the work area:

- Search Window
- List Window
- Details Window
- Drag and Drop Window

### 2.2.2.1 Search Window

A search window provides you with a means to perform a filtered search. The upper panel of a search window offers criteria applicable to the entity you are searching through which you can narrow your search. The lower panel lists the results of a search once it has been performed.

*Figure 2–8 Search Window Example*

### 2.2.2.2 List Window

When you choose to configure a specific rule or code that does not require a search, the Configurator may display a basic list window of the rules and codes that have previously been configured.

***Figure 2–9 List Window Example***

Dimension UOMs ( DEFAULT )

| UOM Code | UOM Description |
|---|---|
| CM | Centimeter |
| FEET | Feet |
| IN | Inch |
| KM | Kilometer |
| METER | Meter |
| MILE | Mile |

Results 6 Of 6

### 2.2.2.3 Details Window

A details window is the main interface through which a bulk of the configuration is done. A details window can contain editable fields and tables, tabs to configure different aspects of an entity, and additional actions that can be performed on an entity.

*Figure 2–10 Details Window Example*

### 2.2.2.4 Drag and Drop Window

You can use a graphical drag and drop window to ease the construction of pipelines, pipeline determination, event handlers, status monitoring rules, and services. A drag and drop window consists of a pallet and a graphical work area.

*Figure 2–11 Drag and Drop Window Example*

Pallet

Graphical Work Area

To begin building any of these entities, choose a component, such as a transaction, from the pallet. Drag the component into the graphical work area. The transaction is now displays as a graphical representation of itself.

To connect one component to another, you must drag the mouse from the outgoing port of a component until it forms a connecting line with the incoming port of another component. The links between components can be set up either horizontally or vertically.

To delete components or links, right-click on the component and choose Delete. Once components and links have been established you can move them around by dragging them, the links redraw themselves according to the new position. If you press and hold the CTRL key while dragging a component, the component is copied within the graphical work area.

# 2.3 Actions Available in the Applications Manager

The following actions can be performed throughout the Applications Manager:

- Using the Configurator's Lookup Functionality
- Viewing the User Logged into the Configurator
- Using Lists and List Filtering
- Using Online Help
- Troubleshooting Errors
- Using Special Characters

## 2.3.1 Using the Configurator's Lookup Functionality

Throughout the Applications Manager there are many fields that have a lookup functionality to find or create additional records as they pertain to that field. For example, on the Primary Info tab of the Organization Details screen, the Locale field has a lookup functionality to create a new locale from that screen. When you choose the Create New lookup button the Locale Details information displays in a pop-up screen for you to modify.

***Figure 2–12 Lookup Icon Example***

The information that displays in a lookup field varies depending on how many records you have pertaining to that particular field. When there are 20 or less records, the lookup displays as a drop-down list with a Create New button. When there are between 21 and 75 records, the lookup displays as a drop-down list with a Search button.

When there are more than 75 records, the lookup displays as a text box with a Search button. You can type the value in the text box or search for the value using the Search button. If you enter a value, it is validated when it is saved. You should always type the value as it would appear if it was displayed as a drop-down list. For example, for a currency lookup, you should type the currency description in the text box even though the

currency code is saved in the table. An error displays on save if the user has entered an invalid value.

When you use a lookup for a particular field in the Configurator, you should refer to the corresponding section in this guide to set up the particular information.

## 2.3.2 Viewing the Document Types Associated with an Application

In the Distributed Order Management, Supply Collaboration, Reverse Logistics, and Logistic Management configuration applications, you can view all of the document types associated with the application. Sales Order, Transfer Order, Master Order, Quote, and Purchase Order are all examples of document types.

To view an application's associated document types, open the applicable application from the menu and choose from the application rules side panel. The Associated Document Types window displays displaying a list of all of the document types associated with the application you are working in.

*Figure 2–13 Associated Document Types Window*

Associated Document Types

| Document Type | Description |
|---|---|
| 0004 | Template Order |
| 0006 | Transfer Order |
| 0001 | Sales Order |
| 0007 | Master Order |
| 0015 | Quote |

Results 5 of 5

### 2.3.2.1 Adding a Document Type to an Application

You can add a document type that is associated with another application to the application you are currently working in.

**Important:** An added document type's associated screens may be irrelevant to the application you are associating it with.

To add a document type to an application:

1. From the Associated Document Types window, choose . The Associated Document Type pop-up window displays.

2. From Document Type, select the document type that you want to associate with the application.
3. Select Enable Access To This Document Through This Application's Console.
4. Choose .

## 2.3.3 Viewing the User Logged into the Configurator

You can view the user logged into the Configurator and their locale at any time. To view this information, move your mouse over the User icon and Locale icons in the bottom right-hand corner of the application to display the tool tips.

## 2.3.4 Using Lists and List Filtering

When viewing any list in the Configurator, it is possible to filter the contents of the list based in criteria that you define. Filtering is

accomplished by right-clicking anywhere on the list's column headings and using the Table Filter Editor associated with the list.

***Figure 2–14 Column Headings in a List***

*Figure 2–15 Table Filter Editor Window Example*

*Table 2–2 Table Filter Editor Window*

| Field | Description |
|---|---|
| Apply To Existing Records | Checking this box applies a new filter set of results that have been previously filtered instead of the whole set. |
| Max Records | Specify the maximum number of records that are to be returned from a filter. The default number is 100 |
| Dynamic Fields | Fields such as "Hold Type" and "Hold Type Description" in Figure 2–15 are dynamically populated based on the list you are currently viewing.<br>These fields can be searched using text strings combined with criteria such as **Is**, **Starts With**, or **Contains.** |

**Important:** Search strings are case sensitive. For example, "Item" does not return the same values as "item".

## 2.3.5 Date and Time Entry

Date fields through the Configurator have a calendar icon that can be used to find dates as it pertains to that field. When you click on this icon, a small calendar displays. You can navigate through this calendar to determine the appropriate date. For example, on the Create Calendar window, the Default Effective To field has a calendar icon that you can use to verify the appropriate ship by date to populate the field.

***Figure 2–16 Calendar Icon example***

You can also enter time of day information throughout the Configurator. To do this, double click on the time field, and enter the time of day.

***Figure 2–17 Time Field example***

Time should be entered in a 24 hour time format everywhere throughout the Configurator.

## 2.3.6 Using Online Help

You can access the Selling and Fulfillment Foundation Online Help through Help > Online Help.

## 2.3.7 Troubleshooting Errors

You can view the description and cause of any error raised in Selling and Fulfillment Foundation, as well as the actions to troubleshoot it.

To view the Selling and Fulfillment Foundation system error descriptions:

1. From the menu bar, choose Help > Troubleshooting. The Error Search window displays.
2. Enter the applicable search criteria and choose . A list of error codes and their descriptions display.

3. Choose to view the cause of the error and action to troubleshoot it.

## 2.3.8 Using Special Characters

Throughout the Applications Manager there may be instances where you need to use special characters in data entry. For information about the use of special characters in Selling and Fulfillment Foundation, see the *Selling and Fulfillment Foundation: Customization Basics Guide*.

# 3

# Configuring Cross-Application Order Promising Components

Order promising is the process of determining what node should be used to ship or provide product, delivery service, and provided service items.

You can define the rules and components necessary to determine the appropriate node and suppliers used to source items. These rules and components are used when there are multiple nodes and suppliers from which you can source items and services.

The configurations detailed in this chapter can be used to determine sourcing based on:

- Where the items are being shipped from
- Ship to log50
- cation
- Availability at different locations
- Total number of shipments required to complete the request
- Node priority
- Delivery region

You can use the Sourcing Setup branch for:

- Configuring the Fulfillment Network Model
- Defining Item Level Controls
- Defining Levels of Service
- Defining Node Level Controls

- Defining Sourcing and Scheduling Rules

# 3.1 Configuring the Fulfillment Network Model

The Fulfillment Network Model is a geographical representation of your configured nodes and their relationships. It also provides a variety of navigation tools and filtering options that enable you to view only pertinent information.

For more information about navigating in the Fulfillment Network Model, see Section 3.1.1, "Navigating in the Fulfillment Network Model".

You can use the Fulfillment Network Model branch for:

- Defining Distribution Groups
- Defining Node Types
- Defining Nodes
- Defining Relationship Types
- Defining Relationships

**Note:** Depending on the amount of data that needs to be processed, the fulfillment network model may take up to a few minutes to load.

## 3.1.1 Navigating in the Fulfillment Network Model

This section describes the Fulfillment Network Model work area. There are three main components, as indicated in the screen shot below:

## Map View

The Map View displays a geographical map. Depending on the filter criteria and map legend options, the nodes and relationships in your fulfillment network appear on this map. Nodes are represented as symbols of different shape, color, and size. Relationships are represented as arrows of different color. The direction of the arrow indicates the To Location and From Location for the relationship.

The Map Legend indicates what each symbol or arrow displayed on the Map represents. Furthermore, unchecking the box next to a symbol or arrow on the Map Legend hides corresponding entities in the Map View. The Map Legend can be dragged to any location within the Map View.

**Note:** The map could become unusable if your fulfillment network contains 4000 nodes and 3000 relationships.

## Action Icons

The action icons allow you to navigate within the Map View, and perform various tasks such as view node details or create relationships. Refer to Table 3–1 for descriptions of each action icon available.

***Table 3–1 Action Icons***

| Action Icon | Description |
|---|---|
| | Select Tool - With the Select tool, you can click on nodes or relationships to select them. A selected node or relationship becomes highlighted to distinguish it from other elements on the map.<br>Double-clicking a node displays the node's details.<br>Double-clicking a relationship displays the relationship's details.<br>You can click and drag to select multiple nodes and relationships. |
| | Zoom In - Click this action to zoom in on the current display area. |
| | Zoom Out - Click on this action to zoom out from the current display area. |
| | Zoom Selection Tool- With the Zoom Selection tool selected, you can click and drag over the area of the map you want to enlarge. |
| | Zoom To Fit - Click this action to return the map to its default magnification. |
| | Pan Tool - With the Pan Tool selected, you can click and drag within the display area to move the map. |
| | View Node Types - Click this action to display the Node Type List screen, where you can create, modify or delete node types. For more information about configuring node types, see Section 3.1.3, "Defining Node Types". |

***Table 3–1 Action Icons***

| Action Icon | Description |
|---|---|
| | View Relationship Types - Click this action to display the Relationship Type List screen, where you can create, modify or delete relationship types. For more information about configuring relationship types, see Section 3.1.5, "Defining Relationship Types". |
| | Create Distribution Group - Clicking this action after one or more nodes are selected on the map displays the Create Distribution Group screen. For more information about creating a distribution group, see Section 3.1.2.1, "Creating a Distribution Group". |
| | View Distribution Groups - Click this action to display the Product Sourcing Distribution Group screen, where you can create, modify, or delete distribution groups. For more information about defining distribution groups, see Section 3.1.2, "Defining Distribution Groups". |
| | Create Node - Click this action to display the Create Node screen, where you can create a node organization. For more information about defining nodes, see Section 3.1.4, "Defining Nodes". |
| | View Node Details - With a node selected on the map, clicking this action displays the Node Details screen. For more information about viewing and modifying node details, see Section 3.1.4.2, "Modifying a Node". |
| | Create Single Relationship - With two nodes selected on the map, clicking this action displays the Relationship Details screen, where you can create a relationship between the nodes. For more information about defining relationships, see Section 3.1.6, "Defining Relationships". |
| | Create Relationships - With two or more nodes selected on the map, clicking this action displays the Create Relationships screen when you can create multiple relationships at once. For more information about defining relationships, see Section 3.1.6, "Defining Relationships". |

***Table 3–1 Action Icons***

| Action Icon | Description |
|---|---|
| | View Relationship Details - With a relationship selected, clicking this action displays the Relationship Details screen, where you can view or modify relationships. For more information about viewing or modifying relationships, see Section 3.1.6.2, "Modifying a Relationship". |
| | Remove Relationships - With one or more relationships selected, clicking this action deletes the selected relationship(s). For more information about deleting relationships, see Section 3.1.6.3, "Deleting a Relationship". |

## Filter Criteria

The Filter Criteria enables a user to specify what entities display on the map. Users can select or deselect what displays from a list of node types, relationship types and distribution groups.

### 3.1.1.1 Using Filter Criteria

To use filter criteria:

1. If the Filter Criteria panel is hidden, it can be made visible by clicking on the UP arrow in the bottom-left corner of the work area.
2. Enter information into the applicable fields. Refer to Table 3–2 for field value descriptions.
3. Once you have specified your filter criteria, select . The Map View is updated with your filter criteria.

   Upon clicking , your filter criteria is saved as a search. When revisiting the Fulfillment Network Model, the most recently saved filter criteria and view is used.

***Table 3–2 Filter Criteria Panel***

| Field | Description |
|---|---|
| Node Type | The node type panel is dynamically populated with the node types you have defined. Check the node types you want to view, and uncheck the node types you want to hide.<br><br>For more information about defining node types, see Section 3.1.3, "Defining Node Types". |
| Relationship Type | The relationship type panel is dynamically populated with the relationship types you have defined. Check the relationship types you want to view, and uncheck the relationship types you want to hide.<br><br>**Note:** Relationships only appear on the map if its To and From nodes belong to a node type that has been selected in the node type panel.<br><br>For more information about defining relationship types, see Section 3.1.5, "Defining Relationship Types". |
| Highlight Distribution Group | Select a distribution group from the drop-down list to be highlighted on the map.<br><br>**Node:** Highlighted nodes only appear on the map if the nodes belong to a node type that has been selected in the node type panel.<br><br>For more information about defining distribution groups, see Section 3.1.2, "Defining Distribution Groups". |

## 3.1.2 Defining Distribution Groups

You can create a set of nodes that can be used when determining sourcing. You can define distribution groups that establish the ship node determination process based on priority.

Select one of the following tasks:

- Creating a Distribution Group
- Modifying a Distribution Group
- Deleting a Distribution Group

### 3.1.2.1 Creating a Distribution Group

To create a distribution group from the Fulfillment Network Model screen:

1. Using the Select tool, select the nodes on the map that you want to include in the distribution group.
2. Select the Create Distribution Group action icon. The Create Distribution Group screen displays.
3. Enter information into the applicable fields. Refer to Table 3–3 for field value descriptions.
4. Click .

***Table 3–3 Create Distribution Group Screen***

| Field | Description |
|---|---|
| Distribution Group | Enter the name of the distribution group. |
| Description | Enter a description for the distribution group. |
| Node List<br>The node list displays the nodes that were selected in the Fulfillment Network Model. These nodes are added to this distribution group. | |
| Node | The name of the node. |
| Description | The description for the node. |

**Note:** You can also create distribution groups without using the Fulfillment Network Model. For more information about creating distribution groups by selecting nodes from a list of nodes, see Section 3.5.8.1, "Creating a Distribution Group".

### 3.1.2.2 Modifying a Distribution Group

To modify a distribution group from the Fulfillment Network Model screen:

1. Select the View Distribution Groups action icon. The Product Sourcing Distribution Group screen displays.
2. Select the applicable distribution group from the list and choose . The Distribution Group Details screen displays.
3. Enter information into the applicable fields. Refer to Table 3–20 for field value descriptions.
4. Click .

### 3.1.2.3 Deleting a Distribution Group

To delete a distribution group from the Fulfillment Network model screen:

1. Select the Distribution Group List action icon. The Product Sourcing Distribution Group screen displays.
2. Select the applicable distribution group from the list and choose .

## 3.1.3 Defining Node Types

You can define node types to classify nodes. You can use node types to define node relationships, and set inventory rules. For more information about defining inventory node type rules, see the *Sterling Global Inventory Visibility: Configuration Guide*.

Select one of the following tasks:

- Creating a Node Type
- Modifying a Node Type
- Deleting a Node Type

### 3.1.3.1 Creating a Node Type

To create a node type from the Fulfillment Network Model screen:

1. Select the View Node Types action icon. The Node Type List screen displays.
2. Choose . The Node Type Detail screen displays.
3. Enter information into the applicable fields. Refer to Table 3–4 for field value descriptions.
4. Click .

***Table 3–4 Node Type Details***

| Field | Description |
|---|---|
| Node Type | Enter a name for the node type. |
| Description | Enter a description for the node type. |

#### 3.1.3.2 Modifying a Node Type

To modify a node type from the Fulfillment Network Model screen:

1. Select the View Node Types action icon. The Node Type List screen displays.
2. Select the applicable node type from the list and choose . The Node Type Detail screen displays.
3. Enter information into the applicable fields. Refer to Table 3–4 for field value descriptions.
4. Click .

#### 3.1.3.3 Deleting a Node Type

To delete a node type from the Fulfillment Network Model screen:

1. Select the View Node Types action icon. The Node Type List screen displays.
2. Select the applicable node type from the list and choose .

### 3.1.4 Defining Nodes

You can use the Fulfillment Network Model to define node organizations. For more information about participant modeling, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

> **Note:** Nodes created through the Fulfillment Network Model screen are automatically defined as child organizations of the Enterprise that the fulfillment network model belongs to.

Select one of the following tasks:

- Creating a Node
- Modifying a Node

#### 3.1.4.1 Creating a Node

To create a node from the Fulfillment Network Model screen:

1. Select the Create Node action icon. The Create Node screen displays.

2. Enter information into the applicable fields. Refer to Table 3–5 for field value descriptions.
3. Click .

***Table 3–5 Create Node Screen***

| Field | Description |
|---|---|
| Organization Code | Enter a unique code that identifies the node. |
| Organization Name | Enter the name of the node. |

***Table 3–5 Create Node Screen***

| Field | Description |
|---|---|
| DUNS Number | Enter a unique nine-digit identification sequence, which provides unique identifiers of single business entities. Selling and Fulfillment Foundation does not associate any logic with the DUNS number. |
| Account Number With Hub | If the node is not the Hub, enter the account number that the node has with the Hub. |
| Locale | Select the node's geographic location. |
| Parent Organization | Select the node's parent organization. |
| Primary Enterprise | If the node is not an Enterprise, select the applicable primary Enterprise. The primary enterprise is defaulted on the entry point order console screens (for example, on search screens and create screens).<br><br>On the organization details screen, when creating or modifying a node organization, the actions that appear on the primary info tab of the node attributes tab are the actions created for that enterprise. Whenever any enterprise level configuration is retrieved in the back-end business logic for a specific organization, the rules are always retrieved for the primary enterprise of that organization. For more information, refer to the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*. |

***Table 3–5 Create Node Screen***

| Field | Description |
|---|---|
| Node Type | Select the node type for this node. |
| Address and Contact Info | The address and contact information for this node organization.<br><br>Choose to enter an address.<br><br>Choose the Contact tab to view additional contact information.<br><br>You can also specify latitude and longitude coordinates for this address. If specified for a node, these coordinates are used to plot the node on the Fulfillment Network Model.<br><br>Latitude and longitude need to be entered using decimal format with a range of -90 to +90 for latitude and -180 to +180 for longitude.<br><br>**Note:** When latitude and longitude coordinates have not been specified, Selling and Fulfillment Foundation plots the node using the zip code specified in the address details.<br><br>Specifying latitude and longitude coordinates overrides the plotting of a node by zip code location. |

### 3.1.4.2 Modifying a Node

To modify a node's details from the Fulfillment Network Model screen:

1. Double-click on the applicable node in the map view, or select the applicable node in the map view and select the Node Details action icon. The Organization Details screen displays.

   For more information about defining node attributes, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

2. Enter information into the applicable fields.
3. Click .

## 3.1.5 Defining Relationship Types

You can define relationship types to classify relationships.

Select one of the following tasks:

- Creating a Relationship Type
- Modifying a Relationship Type
- Deleting a Relationship Type

### 3.1.5.1 Creating a Relationship Type

To create a relationship type:

1. Select the View Relationship Types action icon. The Relationship Type List screen displays.
2. Choose . The Relationship Type Detail screen displays.
3. Enter information into the applicable fields. Refer to Table 3–6 for field value descriptions.
4. Click .

***Table 3–6 Relationship Type Detail Screen***

| Field | Description |
|---|---|
| Relationship Type | Enter the name of the relationship type. |
| Description | Enter a description for the relationship type. |

***Table 3–6 Relationship Type Detail Screen***

| Field | Description |
|---|---|
| From Name | Enter a From Name. The From Name is used to identify the From Location for this relationship type.<br>For example, in a "Store Replenishment" relationship type, the From Name could be "Distribution Center". |
| To Name | Enter a To Name. The To Name is used to identify the To Location for this relationship type.<br>For example, in a "Store Replenishment" relationship type, the To Name could be "Store". |

### 3.1.5.2 Modifying a Relationship Type

To modify a relationship type:

1. Select the View Relationship Types action icon. The Relationship Type List screen displays.
2. Select the applicable relationship type from the list and choose . The Relationship Type Detail screen displays.
3. Enter information into the applicable fields. Refer to Table 3–6 for field value descriptions.
4. Choose .

### 3.1.5.3 Deleting a Relationship Type

To delete a relationship type from the Fulfillment Network model screen:

1. Select the View Relationship Types action icon. The Relationship Type List screen displays.
2. Select the applicable relationship type from the list and choose .

## 3.1.6 Defining Relationships

You can define relationships between two nodes.

Select one of the following tasks:

- Creating a Relationship
- Modifying a Relationship
- Deleting a Relationship

### 3.1.6.1 Creating a Relationship

You can create a single relationship between two nodes.

To create a single relationship between two nodes:

1. Select the Add Single Relationship action icon.
2. On the map, click on the From Node. A line is extended from that node.
3. Click on the To Node to connect the From Node to the To Node. The Relationship Type List displays.
4. From the Relationship Type List, select the relationship type for this relationship and choose Select.

You can also create multiple relationships of the same type from one node to several other nodes, or from several nodes to one node.

To create multiple relationships of the same relationship type.

1. Using the Select tool, select the From Node(s) and To Node(s) between which you want to create the same relationship.
2. Select the Add Relationships action icon. The Relationships Creation Criteria Details window displays.
3. Enter information into the applicable fields. Refer to Table 3–7 for field value descriptions.
4. Choose OK.

***Table 3–7 Relationships Creation Criteria Details Screen***

| Field | Description |
|---|---|
| Node | If you are creating relationships from one node to many nodes, select the single From Node from the dropdown list.<br>If you are creating relationships from many nodes to one node, select the single To Node from the dropdown list. |
| Selected Node Is | From Node - choose this option if the node selected in the "Node" field is the From Node for the relationships.<br>To Node - choose this option if the node selected in the "Node" field is the To Node for the relationships. |
| Relationship Type | Select the relationship type for the relationships. |

### 3.1.6.2 Modifying a Relationship

To modify a relationship:

1. On the map, double-click the relationship you want to modify. The relationship details screen displays.
2. Enter information into the applicable fields. Refer to Table 3–8 for field value descriptions.
3. Choose .

***Table 3–8 Relationship Details Window***

| Field | Description |
|---|---|
| Relationship Type | Select a relationship type for this relationship from the drop-down list. |
| From Node | Select the node from which items are sent.<br>For the Relationship To Node tab, this option is defaulted to the node you are configuring and disabled. |
| To Node | Select the node at which transfer order items are received.<br>For the Relationship From Node tab, this option is defaulted to the node you are configuring and disabled. |
| Transfer Schedules | |
| Effective From | Indicates the date on which the schedule takes effect. |
| Effective To | Indicates the date on which the specified transfer schedule stops being effective. |
| *Days of the Week* | Indicates which days are eligible for items to ship on during the transfer schedule. |

### 3.1.6.3 Deleting a Relationship

To delete a relationship:

1. On the map, select the relationship you want to delete. The relationship displays highlighted.
2. Select the Remove Relationship action icon.
3. Click OK to confirm the deletion.

## 3.2 Defining Item Level Controls

You can define the notification and promising rules for a particular item. These rules are used to determine node scheduling. For more information about scheduling and scheduling rules, see Section 3.5.5, "Defining Scheduling Rules".

To define item level controls:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Item Level Controls. The Product Item Search window displays in the work area.
2. Enter the applicable search criteria and choose . A list of product items displays.
3. Select the applicable item and choose . The Item Level Control pop-up window displays.
4. Enter information into the applicable fields. Refer to Table 3–9 for field value descriptions.
5. Choose .

***Table 3–9 Item Level Control Pop-Up Window***

| Field | Description |
|---|---|
| Release an order for this item *n* days before expected time of shipment | Enter how many days before an order's expected ship date a node needs to receive communication to ship the item. |
| Minimum notification time required at this node is *n* hours prior to expected time of shipment | Enter the minimum business hours it takes to ship the item once an order has been released to the node. |
| ATP Rule | Select the default available-to-promise rule to use to determine availability for the item. For more information about configuring ATP rules, see the *Sterling Global Inventory Visibility: Configuration Guide*. |

# 3.3 Defining Levels of Service

The Level of Service Details window lets you define levels of service for the enterprise. After you define the enterprise's levels of service, set up notification periods at the node level for the enterprise's different levels of service. See Section 3.4.3.1, "Creating a Notification Period" for more information. You can use the Levels of Service branch for:

- Creating a Level of Service
- Modifying a Level of Service
- Deleting a Level of Service

## 3.3.1 Creating a Level of Service

To create a level of service:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Levels of Service. The Levels of Service window displays in the work area.
2. Choose . The Level of Service Details pop-up window displays.
3. In Level of Service, enter the name of the level of service.

4. In Short Description, enter a brief description of the level of service. The description is displayed on the corresponding service level tab in the Current Notification Period window.
5. In Long Description, enter a more detailed description of the level of service.
6. Choose .

## 3.3.2 Modifying a Level of Service

To modify a level of service:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Levels of Service. The Levels of Service window displays in the work area.
2. Select the applicable level of service and choose . The Level of Service Details pop-up window displays.
3. In Short Description, enter a brief description of the level of service.
4. In Long Description, enter a more detailed description of the level of service.
5. Choose .

### 3.3.3 Deleting a Level of Service

To delete a level of service:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Levels of Service. The Levels of Service window displays in the work area.
2. Select the applicable level of service and choose ✕.

## 3.4 Defining Node Level Controls

You can define the notification and promising rules for individual nodes that belong to the organization. These rules are used to determine node scheduling. You can also define the procurement transfer orders for the node, as well as view the transfer schedules of the other nodes it participates with. For more information about scheduling and scheduling rules, see Section 3.5.5, "Defining Scheduling Rules".

You can use the Node Level Controls branch for:

- Defining a Node's Primary Order Promising Information
- Defining a Node's Relationships

### 3.4.1 Defining a Node's Primary Order Promising Information

To define a node's primary order promising information:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Node Level Controls. The Ship Node Search window displays in the work area.
2. Enter the applicable search criteria and choose . A list of node displays.
3. Select the applicable node and choose . The Node Details pop-up window displays.
4. Enter information into the applicable fields. Refer to Table 3–10 for field value descriptions.

> **Important:** Any information entered in this window overrides any information previously defined for the node in Application Platform's Participant Modeling configuration. For more information about configuring a node organization, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

5. Choose .

***Figure 3–1 Node Details***

***Table 3–10 Node Details Pop-Up Window, Primary Information Tab***

| Field | Description |
|---|---|
| Do not schedule an order to this node more than *n* days before expected time of shipment | Enter the maximum number of business days that a schedule can be sent to a node for it to be fulfilled. This number is used when performing earliest schedule date calculations.<br>**Note:** This parameter is only considered if the node is pre-specified on the order line. |
| Receiving Calendar | Select the calendar to use to determine the available shifts for receiving deliveries at the node. The calendars of the node as well as the calendars of the primary enterprise of the node display in this drop-down list. |
| Shipping Calendar | Select the calendar to use to determine the available shifts during which the node can ship orders. The calendars of the node as well as the calendars of the primary enterprise of the node display in this drop-down list. |
| Track Inventory | Select Track Inventory if you want the ship node to track minimum and maximum inventory levels for an item. |

***Table 3–10 Node Details Pop-Up Window, Primary Information Tab***

| Field | Description |
|---|---|
| Use End Of Shift Time | Check this box if you want the node to base shipment time by the end of the next feasible shift.<br><br>Uncheck this field if you want the node to base shipment time by any given node parameters, such as Minimum Notification Time, and the time a shipment can actually be shipped.<br><br>For example, a node works five days a week, with two shifts, 8AM - 4PM and 4PM - 8PM.<br><br>The node's Minimum Notification Time is set to 2 hours.<br><br>If an order is sent to a node on Friday at 1PM, the order is scheduled to ship on same day at 4PM if Use End Of Shift Time box is checked. The order is scheduled to ship on the same day at 3PM if Use End Of Shift Time box is unchecked.<br><br>If an order is sent to a node on Friday at 3PM, the order scheduled to ship on the same day at 8PM if Use End Of Shift Time box is checked. The order is scheduled to ship on the same day at 5PM if Use End Of Shift Time box is unchecked.<br><br>**Note:** Use End Of Shift Time is only applicable to nodes that use a shipping calendar that has shift times defined.<br><br>**Note:** Use End Of Shift Time is only applicable for product lines. |
| Work Order Creation Is Allowed | Choose this box if you want to use Work Orders to support compliance services at this node. Work Orders describe the service activities to customize items based on a buyer's requests. |
| Substitution Is Allowed | Choose this if substitution of product items within an order is allowed. |
| Procure/Transfer to this Node when Inventory is not available | Check this box if the node can accept procurement/transfer orders. For more information about procurement orders, see Section 3.5.13, "Defining Procurement Rules". |
| Requires Transfer Acceptance | Check this box if you want this node to accept a procurement to confirm availability before proceeding with the order. |

***Table 3–10 Node Details Pop-Up Window, Primary Information Tab***

| Field | Description |
|---|---|
| Item-Based Allocation Allowed | Check this box to allow item based allocation for the item. When the 'Use Item Based Allocation' rule is enabled, the item based allocation are only applicable for the items and nodes which have the Item Based Allocation Allowed attribute enabled. For more information about item-based allocation, see the *Selling and Fulfillment Foundation: Product Concepts Guide* |
| Receipt Processing Time For Procurement (Hours) | Enter how many hours it takes the node to process receipts. |
| Receipt Processing Time for Forwarding (Hours) | Enter the time it takes the node to process receipts for forwarding in hours. |
| Receipt Processing Time for Future Inventory (Days) | Enter how many days are required to process incoming future supplies before they are available for orders. |
| **Node Can Ship To** | |
| Any Address | Check this box if this node can ship to any address. |
| All Nodes | Select this option if this node can ship to all nodes. |
| Specific Nodes of Type | If this node can only ship to nodes with a specific node type, select this option, and check the applicable node types available. For more information about creating node types, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*. |

## 3.4.2 Defining a Node's Relationships

A transfer order is a type of chained order that is created when a node that belongs to the organization you are configuring needs to replenish their stock from another node within the organization to fulfill an order. A chained order is an order that is linked to a parent order in which the lifecycle of one effects the other.

You can define a relationship between the node you are defining and another node. Within this relationship you can define a transfer schedule, including the transit time to procure items from a node, on a day-of-week basis. The schedule is used for calculating expected dates.

You can define a transfer schedule that determines when items can be shipped from one node to another, including the transit time to procure items from a node, on a day-of-week basis. The schedule is used for calculating expected dates.

You can create, modify, and delete relationships.

### 3.4.2.1 Creating a Node Relationship

To create a node relationship:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Node Level Controls. The Ship Node Search window displays in the work area.
2. Enter the applicable search criteria and choose . A list of nodes displays.
3. Select the applicable node and choose . The Node Details pop-up window displays.
4. To create a node relationship from the node to another node, choose the Relationship To Node tab. To create a node relationship to the node from another node, choose the Relationship To Node tab.
5. Choose . The Relationship Details pop-up window displays.
6. Enter information into the applicable fields. Refer to Table 3–11 for field value descriptions.
7. Choose .

***Table 3–11 Relationship Details Pop-Up Window***

| Field | Description |
|---|---|
| Relationship Type | Select a relationship type for this relationship from the drop-down list. |
| From Node | Select the node from which items can be procured.<br>For the Relationship To Node tab, this option is defaulted to the node you are configuring and disabled. |
| To Node | Select the node to which transfer order items are sent.<br>For the Relationship From Node tab, this option is defaulted to the node you are configuring and disabled. |
| Transfer Schedules | |
| Effective From | Indicates the date on which the schedule takes effect. |
| Effective To | Indicates the date on which the specified transfer schedule stops being effective. |
| Days of the Week | Indicates on which days during the transfer schedule items are eligible for items to ship. |

### 3.4.2.2 Modifying a Node Relationship

To modify a node relationship:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Node Level Controls. The Ship Node Search window displays in the work area.
2. Enter the applicable search criteria and choose . A list of nodes displays.
3. Select the applicable node and choose . The Node Details pop-up window displays.
4. To modify a node relationship from the node to another node, choose the Relationship To Node tab. To modify a node relationship to the node from another node, choose the Relationship To Node tab.
5. From the table, locate the applicable relationship and choose . The Relationship Details pop-up window displays.
6. Enter information into the applicable fields. Refer to Table 3–11 for field value descriptions.
7. Choose .

### 3.4.2.3 Deleting a Node Relationship

To delete a node relationship:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Node Level Controls. The Ship Node Search window displays in the work area.
2. Enter the applicable search criteria and choose . A list of nodes displays.
3. Select the applicable node and choose . The Node Details pop-up window displays.
4. To delete a node relationship from the node to another node, choose the Relationship To Node tab. To modify a node relationship to the node from another node, choose the Relationship To Node tab.
5. From the table, locate the applicable relationship choose .

### 3.4.2.4 Creating a Transfer Schedule

To create a transfer schedule:

1. From the Relationship Details pop-up window, choose in the Transfer Schedules panel. The Transfer Schedule pop-up window displays.

   For more information about the Relationship Details pop-up window, see Section 3.4.2.1, "Creating a Node Relationship".

2. Enter information in the applicable fields. Refer to Table 3–12 for field value descriptions.

3. Choose .

***Table 3–12 Transfer Schedule Pop-Up Window***

| Field | Description |
|---|---|
| Effective From Date | Indicates the date on which the schedule becomes effective.<br>If this value is not specified, it is assumed that the Transfer Schedule will be effective for an indefinite number of days. |
| Effective To Date | Indicates the date on which the specified transfer schedule stops being effective.<br>If this value is not specified, it is assumed that the Transfer Schedule will remain effective indefinitely. |
| Default Transit Days | Enter the minimum number of days the transfer order shipments will take to reach the end node. |
| Transfer Cost | |
| Transfer Cost Factor Per Unit | Enter the cost of transferring an item to a node.<br>**Note:** To calculate the Transfer Cost Factor Per Unit, the Landed Cost check box and the Use Transportation Cost check box in the Landed Cost window must be selected.<br>Specifying the Transfer Cost Factor Per Unit overrides the value of the Transfer Cost Factor for both internal and external transfers in the Landed Cost window. |
| Currency | Select the currency used for the Transfer Cost Factor Per Unit from the drop-down list.<br>To create a new currency, choose <br>and enter information in the applicable fields. For more information about defining the currency for the transfer cost, see Currency Details.<br>If the currency is not specified, the currency that is specified for the Enterprise will be used. |
| Shipped On | |
| Day of Week | Select the check box pertaining to the day of the week on which item transfers are permitted. |

*Table 3–12 Transfer Schedule Pop-Up Window*

| Field | Description |
|---|---|
| Override Transit Days | Enter the number of transit days pertaining to a specific day of the week. For example, shipping on a Saturday may add one day to the number of transfer days. As a result, the new value of the Transit Days will be 1 + the standard value. |
| Ship Date Overrides | |
| Ship Date | Select the date on which you want to override shipping, for example, a holiday. |
| Can Ship | Select either Yes to allow, or No to disallow shipping on a specified day. |
| Override Transit Days | Enter the override transit days for the Ship Date that is overridden in the Ship Date Overrides. |

**Note:** If a transfer schedule exists for one day, it is assumed that this transfer schedule exists for all days.

### 3.4.2.5 Modifying a Transfer Schedule

To modify a transfer schedule:

1. From the Transfer Schedules panel in the Relationship Details pop-up window, select the Transfer Schedule you want to modify.
2. Choose .
3. Enter information in the applicable fields. For field value descriptions, see Table 3–12.
4. Click .

### 3.4.2.6 Deleting a Transfer Schedule

To delete a transfer schedule:

1. From the Transfer Schedules panel in the Relationship Details pop-up window, select the Transfer Schedule you want to delete.
2. Choose .

## 3.4.3 Defining Notification Periods

You can configure specific days and times that a node will receive notification of orders for shipping, and within each notification period, set up different levels of service.

The Current Notification Period window enables you to specify:

- Advance notification time - the number of hours a node requires for notification prior to expected time of shipment.
- Maximum working hours and system days - the number of working hours and system days required by the ship node between releasing an order and expected time of shipment. This parameter takes the ship node's calendar - such as holidays and non-working days- into account.
- Notification schedule - the times and days of the week that a ship node will accept notifications.

You can create a variety of notification schedules based on calendar timeframes. The resulting Notification Schedule List shows all the schedules, which you can modify and delete.

Notification date is calculated as Expected shipment date - Maximum working hours (including the shipping node's calendar) - Advanced notification days. An order release is created on the notification date that is communicated to the shipping node.

### 3.4.3.1 Creating a Notification Period

To create a notification period:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Node Level Controls. The Ship Node Search window displays in the work area.
2. Enter the applicable search criteria and choose . A list of nodes displays.
3. Select the applicable node and choose . The Node Details pop-up window displays.
4. To create a notification period, choose the Notification Period tab.

5. Enter information into the applicable fields. Refer to Table 3–13 for field value descriptions. You can create multiple Notification Periods, which will be displayed in a list in the Notification Period List screen.
6. Choose .

***Table 3–13 Node Details Pop-Up Window, Notification Period Tab***

| Field | Description |
|---|---|
| Current Notification Period | |
| Effective From Date | Enter the starting date of the notification period. |
| Effective To Date | Enter the end date of the notification period. |

***Table 3–13 Node Details Pop-Up Window, Notification Period Tab***

| Field | Description |
|---|---|
| Notification Details | |
| Tabs:<br>• Advanced Rush<br>• Regular Orders<br>• Rush | Specifies that the notification period is for advanced rush, regular orders, or rush orders.<br>See Section 3.3, "Defining Levels of Service" for information. |
| Node needs to be notified at least <number of hours> hours prior to expected time of shipment | Enter the minimum number of hours a node needs to be notified before the expected time of shipment. |
| Release an order to this node a total of <number of hours> working hours and <number of days> system days before expected time of shipment. | Enter the total number of working hours and system days an order for this item should be released before it is expected to ship. |
| Notification Schedule List | |
| Time | Enter the time of day when this node can be contacted. |
| Day check box | Click in the boxes for the days of the week to which this schedule applies. |
| Notification Period List | Displays a cumulative list of existing notification periods. |

### 3.4.3.2 Modifying a Notification Period

To modify a notification period:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Node Level Controls. The Ship Node Search window displays in the work area.
2. Enter the applicable search criteria and choose . A list of nodes displays.

3. Select the applicable node and choose . The Node Details pop-up window displays.
4. To modify a notification period, choose the Notification Period tab.
5. From the table, locate the applicable notification period and choose . The Notification Period Details pop-up window displays.
6. Enter information into the applicable fields. Refer to Table 3–13 for field value descriptions.
7. Choose .

### 3.4.3.3 Deleting a Notification Period

To delete a notification period:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Node Level Controls. The Ship Node Search window displays in the work area.
2. Enter the applicable search criteria and choose . A list of nodes displays.
3. Select the applicable node and choose . The Node Details pop-up window displays.
4. To delete the Notification Period from the notification period list, choose the Notification Period tab.
5. Select the Notification Period from the list and choose to delete it (or choose to see more details about the Notification Period before deleting it on the Node Details pop-up window).
6. Choose .

### 3.4.3.4 Specifying Levels of Service

The tabs in the Current Notification Period window let you set up different levels of shipping service at a node. For each notification period, use the Regular Orders tab to set up notification schedules for regular orders and any additional tabs to set up notification schedules for other levels of service, such as rush orders. See Section 3.3, "Defining Levels of Service" for more information.

To specify levels of service:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Node Level Controls. The Ship Node Search window displays in the work area.
2. Enter the applicable search criteria and choose . A list of nodes displays.
3. Select the applicable node and choose . The Node Details pop-up window displays.
4. Choose the Notification Period tab.
5. From the table, locate the applicable notification period and choose . The Notification Period Details pop-up window displays.
6. Choose the applicable tab for the level of service. You can configure as many levels of service for a notification period as there are tabs. For example, to create notification schedules for regular orders, choose the Regular Orders tab; to create notification schedules for rush orders, choose the tab for rush orders.
7. Enter information into the applicable fields. Refer to Table 3–13 for field value descriptions.
8. Choose .

## 3.5 Defining Sourcing and Scheduling Rules

You can define the sourcing and scheduling rules for product items, delivery services, and provided services.

You can use the Sourcing and Scheduling branch for:

- Defining Fulfillment Types
- Defining Basic Sourcing Configuration
- Creating an Order Sourcing Classification
- Defining Sourcing Region Selection
- Defining Scheduling Rules
- Configuring Landed Cost Optimization
- Defining Forwarding/Transfer Rules

- Defining Distribution Groups for Product Items
- Defining Sourcing Rules for Product Items
- Defining Sourcing Rules for Delivery Service Items
- Defining Distribution Groups for Provided Service Items
- Defining Sourcing Rules for Provided Service Items
- Defining Procurement Rules

## 3.5.1 Defining Fulfillment Types

You must associate fulfillment types with sourcing and procurement rules. Fulfillment types are used to define custom requirements that allow you to determine sourcing and procurement locations based on parameters that Selling and Fulfillment Foundation does not provide logic for, such as, customers and order type. For example, you want to source or procure orders for a special promotion from a particular node. You can create a fulfillment type called Promotion that you can associate with a sourcing or procurement rule that sources from the node.

**Important:** The sourcing rules for product sourcing and procurement must have the same fulfillment type for sourcing setup to work properly.

You can use the Fulfillment Types branch for:

- Creating a Fulfillment Type
- Modifying a Fulfillment Type
- Deleting a Fulfillment Type

### 3.5.1.1 Creating a Fulfillment Type

To create a fulfillment type:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Fulfillment Types. The Fulfillment Types window displays in the work area.
2. Choose . The Fulfillment Types Details pop-up window displays.

3. In Fulfillment Type, enter the name of the fulfillment type.
4. In Short Description, enter a brief description of the fulfillment type.
5. In Long Description, enter a more detailed description of the fulfillment type.
6. Choose .

### 3.5.1.2 Modifying a Fulfillment Type

To modify a fulfillment type:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Fulfillment Types. The Fulfillment Types window displays in the work area.
2. Select the applicable fulfillment type and choose . The Fulfillment Types Details pop-up window displays.
3. In Short Description, enter a brief description of the fulfillment type.
4. In Long Description, enter a more detailed description of the fulfillment type.
5. Choose .

#### 3.5.1.3 Deleting a Fulfillment Type

To delete a fulfillment type:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Fulfillment Types. The Fulfillment Types window displays in the work area.
2. Select the applicable fulfillment type and choose .

### 3.5.2 Defining Basic Sourcing Configuration

You can determine whether or not the organization you are configuring uses sourcing rules. When an organization only has one or two nodes from which they source all of their products and services, you may not need to define complex sourcing configurations. However, when an organization has many nodes and suppliers with whom they interact, you would want to define sourcing rules to ensure that the optimal nodes are used to handle shipping and service fulfillment.

> **Note:** In cases when you do not define sourcing rules for an organization but may have more than one node, the system still uses optimization logic, such as distance to ship to location, to determine the appropriate node to use.

To configure basic sourcing rules:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Basic Configuration. The Sourcing Basic Configuration window displays in the work area.
2. Enter information into the applicable fields. Refer to Table 3–14 for field value descriptions.
3. Choose .

***Table 3–14 Sourcing Basic Configuration Window***

| Field | Description |
|---|---|
| Default Fulfillment Type to be used when not specified on the order | Select the fulfillment type you want to be use by default for sourcing when no fulfillment type is specified on the order. For more information about configuring fulfillment types, see Section 3.5.1, "Defining Fulfillment Types". |
| Products being shipped | |
| Use any of my nodes for shipping the product | Select this option if you do not want to define product item sourcing rules for the organization you are configuring. If you select this option, the system optimizes product sourcing based on the node(s) you have defined for the organization.<br>**Important:** If an Enterprise inherits sourcing rules from another organization, they inherit the parent Enterprise's nodes when they select this option. |

***Table 3–14 Sourcing Basic Configuration Window***

| Field | Description |
|---|---|
| Find node based on sourcing rule setup | Select this option if you want to use configured product item sourcing rules with the organization you are configuring. For more information about configuring product item sourcing rules, see Section 3.5.9, "Defining Sourcing Rules for Product Items". |
| Default Distribution Rule to be used when no sourcing rule found | Select the default distribution group you want to use to source product items when the system cannot determine an appropriate sourcing rule to use for an order. A distribution group is a defined set of nodes and source organizations.<br>**Note:** Sterling Commerce recommends you to configure a default Distribution Rule for each demand owner. The default Distribution Rule is used to map unassigned demands to supply. If you do not configure the default Distribution Rule, the APIs may return results as AVAILABLE, causing orders to get accepted even though they cannot be actually sourced.<br>For more information about configuring distribution groups for product items, see Section 3.5.8, "Defining Distribution Groups for Product Items". |
| Products being delivered | |
| Use any node for delivering the product | Select this option if you want the system to select any delivery location that services a given delivery region. |
| Find nodes based on sourcing rule setup | Select this option if you want to use configured delivery service item sourcing rules with the organization you are configuring. For more information about configuring delivery service item sourcing rules, see Section 3.5.9, "Defining Sourcing Rules for Product Items". |
| Provided Services | |

*Table 3–14 Sourcing Basic Configuration Window*

| Field | Description |
|---|---|
| Use any node that can provide the service | Select this option if you want the system to select any provided service location that services a given shipping region. |
| Find node based on sourcing rule setup | Select this option if you want to use configured provided service item sourcing rules with the organization you are configuring. For more information about configuring provided service item sourcing rules, see Section 3.5.9, "Defining Sourcing Rules for Product Items". |

## 3.5.3 Defining Order Sourcing Classifications

An order sourcing classification represents a customizable sourcing criteria used to determine which ship node to ship a product from, at scheduling time. For more information about order sourcing classifications, see the *Selling and Fulfillment Foundation: Product Concepts Guide*.

You can use the Order Sourcing Classifications branch for:

- Creating an Order Sourcing Classification
- Modifying an Order Sourcing Classification
- Deleting an Order Sourcing Classification

### 3.5.3.1 Creating an Order Sourcing Classification

To create or modify an order sourcing classification:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Order Sourcing Classifications. The Sourcing Classifications window displays in the work area.
2. Click . The Order Sourcing Classification Details pop-up window displays.

3. In Order Sourcing Classification, enter the name of the sourcing classification.
4. In Short Description, enter the name of the short description.
5. In Long Description, enter the name of the long description.
6. Click .

### 3.5.3.2 Modifying an Order Sourcing Classification

To modify an order sourcing classification:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Order Sourcing Classifications. The Sourcing Classifications window displays in the work area.
2. Select the applicable sourcing classification and click . The Order Sourcing Classification Details pop-up window displays.
3. In Short Description, enter the name of the short description.
4. In Long Description, enter the name of the long description.
5. Click .

#### 3.5.3.3 Deleting an Order Sourcing Classification

To delete an order sourcing classification:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Order Sourcing Classifications. The Order Sourcing Classifications window displays in the work area.
2. Select the applicable order sourcing classification and click .

### 3.5.4 Defining Sourcing Region Selection

A region schema represents the complete set of regions defining a given geography. You can use Sourcing Region Selection to associate pre-existing region schemas for use within sourcing configuration. For more information about configuring region schemas, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

You can associate region schemas with the following:

- Shipped Product Region Schema - You can select a region schema that to be used when configuring the product specific sourcing rules. The regions within the selected region schema can then be associated with nodes or groups of nodes from which product items can be shipped to a destination.
- Delivery Region Schema - You can select a region schema to be used when configuring delivery service specific sourcing rules. The regions within the selected region schema can then be associated with nodes or groups of nodes that provide a given delivery service when a delivery is requested to the specific region.
- Provided Service Region Schema – You can select a region schema to be used when configuring provided service specific sourcing rules. The regions within the selected region schema be associated with nodes or groups of nodes that can provide a requested service when the service location is within the specific region.

**Note:** You can select the same region schema for product, delivery, and provided service sourcing configuration or you can select a different region schema for each if you would like to define a more granular region definition for any of the three.

To define sourcing region selection:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Sourcing Region Selection. The Region Usage For Sourcing pop-up window displays in the work area.

2. From Schema for Product being shipped, select the region schema you want to use for product item sourcing.
3. From Schema for Product being delivered, select the region schema you want to use for delivery service item sourcing.
4. From Schema for Provided Service, select the region schema you want to use for provided service item sourcing.

## 3.5.5 Defining Scheduling Rules

Scheduling rules determine shipping, inventory scheduling, and node preferences. When the Schedule time-triggered transaction schedules

inventory, scheduling rules are used. You can have one scheduling rule for all orders or you can associate a specific scheduling rule with an order. This allows different scheduling rules to be used based on your business requirements.

There are three ways to assign a scheduling rule to an order:

- The scheduling rule is passed as part of the order data when creating an order.
- A customer service representative selects a scheduling rule from the Application Consoles.
- If a scheduling rule is not assigned by other means, Selling and Fulfillment Foundation uses the default SYSTEM scheduling rule.

**Important:** When creating scheduling rules for Enterprises, there must always be one scheduling rule named SYSTEM to be used as a default throughout the system.

The scheduling rule can be passed as input to APIs that read inventory (AllocationRuleID), for example FindInventory. If not passed, the system searches for a scheduling rule named SYSTEM for the calling organization's primary enterprise. If a scheduling rule with the name SYSTEM is not found, the SYSTEM rule for the DEFAULT organization is used.

Therefore, while creating scheduling rules, a rule named SYSTEM should be created if the scheduling rule is not always passed as API input.

**Note:** The scheduling algorithm is based only on ship node priority and geography.

You can use the Scheduling Rules branch for:

- Creating a Scheduling Rule
- Modifying a Scheduling Rule
- Deleting a Scheduling Rule

### 3.5.5.1 Creating a Scheduling Rule

To create a scheduling rule:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Scheduling Rules. The Scheduling Rules screen displays in the work area.
2. Choose . The Scheduling Rule Details screen displays.

3. Enter information into the applicable fields. Refer to Table 3–15 for field value descriptions.
4. Choose .

***Table 3–15 Scheduling Rule Details Screen***

| Field | Description |
|---|---|
| **Primary Information** | |
| Scheduling Rule | Enter the name of the scheduling rule. |
| Scheduling Rule Description | Enter a brief description of the scheduling rule. |
| **Retry Intervals** | |
| If Product is Backordered, retry scheduling after this time (Hours) | Enter how many hours after an order has been backordered that the system should try to reprocess the order.<br>**Note**: The minimum wait period for retrying to schedule an order is 30 minutes, even if the value specified is less than that. For instance, if the wait period is set to 0.2, the business logic of Selling and Fulfillment Foundation still treats it as if it were 0.5. |
| If scheduling fails for any other reason retry scheduling: | For products, after this time (Hours) - Enter how many hours after which the Schedule time-triggered transaction should try to schedule a product item order line if the order line is not ready to schedule when it is initially picked up.<br>For delivery or provided services, after this time (Hours) - Enter how many hours after which the Schedule time-triggered transaction should try to schedule a service item order line if the order line is not ready to schedule when it is initially picked up. |
| **Constraints** | |
| Ship Complete | Check this box to ensure that all product lines in the promising inquiry request are either completely scheduled or not scheduled at all. However, lines could be sourced from different shipping locations. |

***Table 3–15 Scheduling Rule Details Screen***

| Field | Description |
|---|---|
| Line Ship Complete | Check this box to ensure that every product line on an individual line basis is either completely sourced or not sourced at all. However, lines could be sourced from different shipping locations.<br>**Note:** The difference between this and the Ship Complete constraint is that this rule does not enforce that all lines of the request are completely sourced. A particular line can be sourced while another line of the same request could be backordered. |
| Ship from Single Node | Check this box to ensure that the request is sourced from a single node on a single date. |
| Line Ship from Single Node | Check this box to ensure that each individual line is sourced from a single node on the same date.<br>**Note:** This rule does not enforce that all lines are shipped from the same node. A particular line may be completely shipped from node 1 while another line could be completely shipped from node 2. |
| **Inventory Controls** | |
| Always | Select this option to consider using unplanned inventory at both the inquiring and scheduling stages when other sourcing options have been exhausted.<br>**Note:** In order to use unplanned inventory, the "Use Unplanned Inventory" flag must be set to "Yes" at the Item level. |
| Only During Inquiry | Select this option to consider using unplanned inventory only during the inquiring stage when other sourcing options have been exhausted.<br>**Note:** In order to use unplanned inventory, the "Use Unplanned Inventory" flag must be set to "Yes" at the Item level. |
| Cancel Order for Inventory Shortage | Check this box if you want the system to cancel an order when there is an inventory shortage.<br>When unchecked, the item is backordered. |

***Table 3–15 Scheduling Rule Details Screen***

| Field | Description |
|---|---|
| Apply On Hand Safety Factor To On Hand Inventory Availability | Check this box to apply the on hand safety factor to on hand inventory availability.<br>**Note:** For safety factors to apply, this control must also be checked for the supply type and node type. For more information on Safety Factors, refer to the *Sterling Global Inventory Visibility: Configuration Guide*. |
| Apply Future Safety Factor To Future Inventory Availability | Check this box to apply the future safety factor to future inventory availability.<br>**Note:** For safety factors to apply, this control must also be checked for the supply type and node type. For more information on Safety Factors, refer to the *Sterling Global Inventory Visibility: Configuration Guide*. |
| **Lead Times** | |
| Maximum no. of days order can be scheduled before its ship date | Enter a lead time for orders to be picked up by the Schedule agent. |
| Maximum no. of days order can be shipped/delivered beyond its requested date | Enter the number of days after the requested ship date that an order can be released.<br>**Note:** For tag controlled items, if demands are being matched against future inventory (purchase orders), during an existing supply and demand reallocation, the “Maximum no. of days order can be shipped/delivered beyond its requested date” rule is not considered. This may cause an existing order which was previously scheduled, to be backordered during release. To avoid this, if possible, set the ForwardConsumptionDays in the ATP rule equal to the value defined in the “Maximum no. of days order can be shipped/delivered beyond its requested date” rule.<br>For more information, see that note in Table 3-5 "ATP Rules Details Pop-Up Window" for the Forward Consumption (Days) field, in the *Sterling Global Inventory Visibility: Configuration Guide*. |
| Maximum no. of days order can be scheduled before its ship date | Enter the maximum number of days before the ship date that an order can be scheduled. |

***Table 3–15 Scheduling Rule Details Screen***

| Field | Description |
|---|---|
| Maximum no. of days to search service availability for | Enter the maximum number of days through which you want to look up service and slot availability. |
| **Reservations** | |
| Allow Reservation During Scheduling | Check this box to allow the items to be reserved while scheduling. |
| Reserve Bundle Out of Ratio | Check this box to reserve components that are out of ratio for a bundle. |
| Ignore Fill Quantity (Ship Complete) | Check this box to allow the reservation of partial quantity of a line that has a ship complete constraint or to reserve the quantity that is less than the fill quantity. |
| **Priority** | |
| Consider distance between ship-to and ship-from locations for prioritization | Check this box to enable the geography-based distance calculations for choosing a ship node.<br>**Important:** If you select this field, ensure Optimize On is set to Priority. |
| Weightage given of distance | Enter the weighting factor for distance. Once the distance between the ship-location and the ship node address is calculated using longitude and latitude, it is multiplied by this weighting factor.<br>Enter any fractional number greater than, or equal to, zero. A value of 0 nullifies any distance considerations in the calculation. |
| Weightage given to Node | Enter the weighting factor for node priority. The ship node priority specified in the distribution group is multiplied by this weighting factor.<br>Enter any fractional number greater than, or equal to, zero. A value of 0 nullifies any node priority considerations in the calculation.<br>**Important:** For this weighting factor to be applied, distribution groups must be used to determine the set of possible ship nodes from which a product can be shipped. |
| **Optimize On** | |
| Date | Select this option for inventory scheduling to be optimized by date. |

***Table 3–15 Scheduling Rule Details Screen***

| Field | Description |
|---|---|
| Priority | Select this option for inventory scheduling to be optimized by node priority. |
| Cost, Number of Shipments | Select this option for inventory scheduling to be optimized by number of shipments.<br>**Note:** When landed cost optimization is enabled, it takes precedence over optimization by the number of shipments. When landed cost optimization is disabled, optimization by the number of shipments is used. For more information, refer to Section 3.5.6, "Configuring Landed Cost Optimization" on page 92. |
| **Additional Optimization Criteria** | |
| When Optimizing On Cost, Combine Shipments In <number of days> Day Intervals. This May Avoid Shipment Delay, But May Lead To Extra Cost | Check this box to combine the optimization based on both cost and specified number of days.<br>In this case, enter the number of days up to which the optimization should be considered. |
| Delay Shipment Against Current Inventory To Be Consolidated With Shipments Against Future Inventory. | Check this box to delay shipments against the onhand inventory to be consolidated with the future inventory.<br>This option can be chosen only when the "When Optimizing On Cost, Combine Shipments" box is checked.<br>When this option is selected, the onhand inventory is kept on hold for the specified number of days to combine with shipments that include future inventory.<br>If the future inventory is not received on or before the specified number of days, the onhand inventory is shipped individually. |

***Table 3–15 Scheduling Rule Details Screen***

| Field | Description |
|---|---|
| Delay Procurements To Be Consolidated With Shipments Against Future Inventory. | Check this box to delay shipments when the inventory through transfers are available.<br>This option can be chosen only when the "When Optimizing On Cost, Combine Shipments" is checked.<br>When this option is selected, the inventory through transfers is kept on hold for the specified number of days to combine with shipments that include future inventory.<br>If the future inventory is not received on or before the specified days, the inventory is shipped individually. |
| **Backward Compatibility Controls** | |
| Assume Infinite Inventory Availability Beyond Lead Time | Check this box if you want the system to consider any inventory beyond the lead time + processing time frame to be infinite.<br>**Note:** This flag should only be used for backward compatibility purposes. New customers should not use this flag. |
| **Other Rules** | |
| Ignore Merging To Minimize Shipment | Check this box if you want to ignore the merging of shipments at the scheduling level.<br>When this option is selected, the "Minimize Number Of Shipments To Customer Through Transfers Between Shipping Nodes" option is overridden at the enterprise level in Forwarding/Transfer Rules.<br>For more information about forwarding and transfer rules, see Section 3.5.7, "Defining Forwarding/Transfer Rules". |
| Ignore Use Of Landed Cost For Optimization | Check this box if you want to ignore the use of landed cost optimization at the scheduling level.<br>When this option is selected, the "Use landed Cost" option is overridden at the enterprise level in Landed Cost Optimization.<br>For more information about configuring the landed cost parameters, see Section 3.5.6, "Configuring Landed Cost Optimization". |

#### 3.5.5.2 Modifying a Scheduling Rule

To modify a scheduling rule:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Scheduling Rules. The Scheduling Rules screen displays in the work area.
2. Select the applicable scheduling rule and choose . The Scheduling Rule Details screen displays.
3. Modify information into the applicable fields. Refer to Table 3–15 for field value descriptions.
4. Choose .

#### 3.5.5.3 Deleting a Scheduling Rule

To delete a scheduling rule:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Scheduling Rules. The Scheduling Rules screen displays in the work area.
2. Select the applicable scheduling rule and choose .

### 3.5.6 Configuring Landed Cost Optimization

Selling and Fulfillment Foundation enables you to specify landed cost parameters to be considered for evaluation during order promising, if the "Cost, Number of Shipments" optimization type has been selected in your scheduling rule. For more information about optimization types, see Section 3.5.5, "Defining Scheduling Rules", or the *Selling and Fulfillment Foundation: Product Concepts Guide*.

Promising selects the sourcing option with the least landed cost. Landed cost is comprised of item cost, handling cost, and transportation cost, which can be configured separately.

**Note:** When landed cost optimization is enabled, it takes precedence over optimization by the number of shipments. When landed cost optimization is disabled, optimization by the number of shipments is used.

To configure landed cost optimization:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Landed Cost. The Landed Cost window displays in the work area.
2. Enter information into the applicable fields. Refer to Table 3–16 for field value descriptions.
3. Choose .

***Figure 3–2 Landed Cost***

***Table 3–16 Landed Cost Window***

| Field | Description |
|---|---|
| Use Landed Cost | Check this box to enable the use of landed cost optimization. Uncheck this box to disable all options in this window. |
| Use Item Cost | Check this box to indicate that item cost should be used when computing landed cost. |
| Use Transportation Cost | Check this box to indicate that transportation cost criteria should be used when computing landed cost. |
| **Transfers** | |

***Table 3–16 Landed Cost Window***

| Field | Description |
|---|---|
| Transfer Cost Factor Currency | Select the currency used for the transfer cost factor from the drop-down list. |
| Transfer Cost Factor __ Per __ Per __ for Internal Transfers | Enter the transfer cost factor and select the correct UOMs for internal transfers.<br>The internal transfer cost factor is used to calculate transfer cost when there is a transfer schedule between two nodes.<br>**Note:** The value of the Transfer Cost Factor Per Unit specified in the Transfer Schedule pop-up window overrides the value of the Transfer Cost Factor for the internal transfers. |
| Transfer Cost Factor __ Per __ Per __ for External Transfers | Enter the transfer cost factor and select the correct UOMs for external transfers.<br>The external transfer cost factor is used when a transfer schedule does not exist between two nodes.<br>**Note:** The value of the Transfer Cost Factor Per Unit specified in the Transfer Schedule pop-up window overrides the value of the Transfer Cost Factor for the internal transfers. |
| **Last Leg Transportation** | |
| Outbound Constraints | Choose to open the Outbound Constraints window, where you can configure outbound constraints and define routing guides.<br>For more information about outbound constraints, see Section 5.4, "Defining Outbound Constraints". |
| For Transportation Cost Based On Number Of Cartons, Assume Volume Per Carton To Be __ | Enter a volume and volume UOM to be used when transportation cost is based on the number of cartons. |
| Use Handling Cost | Check this box to indicate that handling cost should be used when computing landed cost. Unchecking this box disables the Enterprise Node Type Rules inner panel.<br>For more information about defining enterprise node type rules, see Section 3.5.6.2, "Defining Enterprise Node Type Rules". |

***Table 3–16 Landed Cost Window***

| Field | Description |
|---|---|
| Convert Node Priority into Cost | Check this box to use the priority of the node to be converted into cost.<br>When this box is checked, the node with a lower priority is considered when optimizing on cost. |
| Node Priority Cost Factor | Enter the cost factor for the node. You can enter values to this field only when the "Convert Node Priority into Cost" is enabled.<br>Choose the currency for the cost from the drop-down list.<br>To create a new currency, choose <br>and enter information to the applicable fields. For more information about defining the currency for the node priority cost factor, see Currency Details. |

### 3.5.6.1 Currency Details

You can define the currency for the node priority cost factor in the currency details pop-up window.

***Figure 3–3 Currency Details***

***Table 3–17 Currency Details***

| Field | Description |
|---|---|
| Currency | Enter the currency in which you want to define the cost factor. |
| Description | Enter a description for the currency. |
| Prefix Symbol | Enter the prefix symbol for the currency defined. |
| Postfix Symbol | Enter the postfix symbol for the currency defined. |
| Euro Member | Check this box if you have defined the currency as a Euro currency member. |
| Expiration Date | Enter the date on which the Euro membership expires. |

**Note:** The icon is available only at the hub level.

### 3.5.6.2 Defining Enterprise Node Type Rules

You can define Enterprise Node Type Rules to specify the handling costs of various node types at the Enterprise level.

- Creating an Enterprise Node Type Rule
- Modifying an Enterprise Node Type Rule
- Deleting an Enterprise Node Type Rule

#### Creating an Enterprise Node Type Rule

To create an Enterprise node type rule:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Landed Cost. The Landed Cost window displays in the work area.
2. In the Enterprise Node Type Rules panel, choose . The Enterprise Node Type Rule window displays.

**Note:** The "Use Handling Cost" checkbox must be selected to enable Enterprise Node Type Rules.

3. Enter information into the applicable fields. Refer to Table 3–18 for field value descriptions.
4. Choose .

***Table 3–18 Enterprise Node Type Rule Pop-up Window***

| Field | Description |
|---|---|
| Node Type | Select the node type from the drop-down list. |
| Currency | Select the currency to use for this rule from the drop-down list. |
| Inbound Handling Cost | |
| Per Shipment | Enter the handling cost for each shipment, in the currency selected above. |
| Per Line | Enter the handling cost for each line, in the currency selected above. |

***Table 3–18 Enterprise Node Type Rule Pop-up Window***

| Field | Description |
|---|---|
| Per Unit | Choose this option to enter the handling cost for each unit.<br>Choosing this option disables the "Per Unit Weight" option. |
| Per Unit Weight | Choose this option to enter the handling cost for each unit weight.<br>Choosing this option disables the "Per Unit" option. |
| Outbound Handling Cost | |
| Per Shipment | Enter the handling cost for each shipment, in the currency selected above. |
| Per Line | Enter the handling cost for each line, in the currency selected above. |
| Per Unit | Choose this option to enter the handling cost for each unit.<br>Choosing this option disables the "Per Unit Weight" option. |
| Per Unit Weight | Choose this option to enter the handling cost for each unit weight.<br>Choosing this option disables the "Per Unit" option. |

### Modifying an Enterprise Node Type Rule

To modify an Enterprise node type rule:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Landed Cost. The Landed Cost window displays in the work area.
2. In the Enterprise Node Type Rules panel, select the applicable rule and choose . The Enterprise Node Type Rule window displays.

   **Note:** The "Use Handling Cost" checkbox must be selected to enable Enterprise Node Type Rules.
3. Enter information into the applicable fields. Refer to Table 3–18 for field value descriptions.
4. Choose .

### Deleting an Enterprise Node Type Rule

To delete an Enterprise node type rule:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Landed Cost. The Landed Cost window displays in the work area.
2. In the Enterprise Node Type Rules panel, select the applicable rule and choose ✕.

## 3.5.7 Defining Forwarding / Transfer Rules

Forwarding rules enable you to minimize transportation costs by allowing you to specify a default carrier service to move shipments from one node to another before shipping to a customer, otherwise known as zone skipping.

When evaluating options, Selling and Fulfillment Foundation identifies ship nodes that can fulfill the request, then utilizes routing guides to determine the best possible drop location and carrier that meets any item constraints.

Forwarding is not applied in the following scenarios:

- If forwarding is not enabled at the Enterprise level.
- If forwarding is not enabled at the line level.
- If forwarding is not enabled at the item level.
- If a shipment is being delivered.
- If a shipment has shipping and receiving nodes with a transfer schedule between them.
- If the shipment is not a final shipment to the customer (procurements cannot be forwarded).
- If a carrier service code is not specified at the line or header level.
- If the document type classification is not "Sales Order" or "Other".

Transfer rules enable you to minimize the number of shipments to a customer by determining a merge node, where shipments can be consolidated before shipping to a customer.

To define forwarding/transfer rules:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Forwarding/Transfer Rules. The Forwarding/Transfer Rules window displays in the work area.
2. Enter information into the applicable fields. Refer to Table 3–19 for field value descriptions.
3. Choose .

***Table 3–19 Forwarding/Transfer Rules Window***

| Field | Description |
|---|---|
| Forwarding Rules | |
| Use Forwarding | Select this checkbox if you want use forwarding.<br>Deselecting this checkbox disables all other forwarding options. |
| Default Carrier Service For Forwarding | Select a default carrier service to use during forwarding from the drop-down list. |
| For Transportation Considerations Based On Number Of Cartons: | |
| Assume Average Volume Per Carton To Be __ | Enter a volume and volume UOM to be used as the assumed average volume per carton. |

***Table 3–19 Forwarding/Transfer Rules Window***

| Field | Description |
|---|---|
| Link To Outbound Constraints | Choosing opens the Outbound Constraints window, where you can configure outbound constraints and define routing guides.<br>For more information about outbound constraints, see Section 5.4, "Defining Outbound Constraints". |
| Transfer Rules | |
| Minimize Number Of Shipments To Consider Through Transfers Between Shipping Nodes | Select this checkbox to minimize the number of shipments Selling and Fulfillment Foundation considers through transfers between shipping nodes. |
| Consider Transfers Only When Following Relationship Exists Between Two Shipping Nodes | Select a relationship type from the drop-down list. Transfers are considered only when this relationship exists between two shipping nodes.<br>This field is disabled if the "Minimize Number of Shipments To Consider Through Transfers Between Shipping Nodes" checkbox is not selected. |

## 3.5.8 Defining Distribution Groups for Product Items

You can create a set of nodes/external organizations that can be used when determining sourcing. You can define distribution groups that establish the ship node determination process based on priority.

**Note:** For backward compatibility purposes, you can also create rules for individual items at a source node or for the entire source node.

You can use the Distribution Rules branch for:

- Creating a Distribution Group
- Deleting a Distribution Group

### 3.5.8.1 Creating a Distribution Group

To create a distribution group:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Product Being Shipped > Distribution Rules. The Distribution Rules window displays in the work area.
2. Choose . The Distribution Group Detail window displays.

3. In Distribution Group, enter the name of the distribution rule.
4. In Description, enter a brief description of the distribution rule.
5. Choose .

You can use the Distribution Group Details window for:

- Adding Nodes/External Organizations to a Distribution Group
- Modifying a Distribution Group's Node/External Organization
- Deleting a Distribution Group's Node/External Organization

#### 3.5.8.1.1 Adding Nodes/External Organizations to a Distribution Group

To add a node/external organization to a distribution group:

1. In the Distribution Group Details window, choose the Distribution Detail tab.
2. Choose . The Distribution Details pop-up window displays.
3. Enter information into the applicable fields. Refer to Table 3–20 for field value descriptions.
4. Choose .

***Table 3–20 Distribution Details Window***

| Field | Description |
|---|---|
| Source | |
| Source Ship Node | Select Source Ship Node and select the applicable node if you want to add a node within your organization to the distribution group. |

***Table 3–20 Distribution Details Window***

| Field | Description |
|---|---|
| Source Organization | Select Source Organization and select the applicable organization if you want to add an external organization to the distribution group. |
| Priority | Enter the node/external organization's priority within the distribution group.<br>**Note:** Priority is not unique to a distribution group, therefore more than one distribution group can have the same priority. |

**Note:** If you adding nodes or external organizations to a distribution group, do not use the advanced tab. Use sourcing rules instead. For more information about configuring sourcing rules, see Section 3.5, "Defining Sourcing and Scheduling Rules".

#### 3.5.8.1.2 Modifying a Distribution Group's Node/External Organization

To modify a distribution group's node/external organization:

1. In the Distribution Group Details window, choose the Distribution Detail tab.
2. Select the applicable distribution detail and choose . The Distribution Details pop-up window displays.
3. Enter information into the applicable fields. Refer to Table 3–20 for field value descriptions.
4. Choose .

#### 3.5.8.1.3 Deleting a Distribution Group's Node/External Organization

To delete a distribution group's node/external organization:

1. In the Distribution Group Details window, choose the Distribution Detail tab.
2. Select the applicable distribution detail and choose .

### 3.5.8.2 Adding Advanced Distribution Details to a Distribution Group (For Backward Compatibility Only)

You can add specific details, such as sourcing information, and assign them a date range through which they are effective.

**Important:** Sterling Commerce strongly recommends the use of sourcing rules instead of advanced distribution groups. This feature is provided for backward compatibility purposes only.

**Note:** If setting up advanced distribution rules, do not use the base distribution rules under the distribution detail tab.

To add advanced distribution details to a distribution rule:

1. In the Distribution Group Details window, choose the Advanced tab.
2. From the Distribution table, choose . The Distribution Details pop-up window displays.
3. Enter information in the applicable fields. Refer to Table 3–7 for field value descriptions.
4. Choose .

***Table 3–21 Advanced Distribution Details window***

| Field | Description |
|---|---|
| All Items | Select this option to apply the distribution rule to all of the items in the node you are setting the rule up for. |
| Apply To Specific Item At This Source | Select this option to apply the distribution rule to a specific item in the node or organization you are setting the rule up for. |
| Primary Info | |
| Item ID | If you selected Apply To Specific Item At This Source, enter the item ID for which you are creating the Distribution Rule. |
| Active | Check Active if the distribution rules are active. |
| Item Name at Node | If you selected Apply To Specific Item At This Source, enter the node's name for the item. The distribution record created for the inventory consolidator displays in the Inventory Console. |
| Priority | Enter a priority number for the node for this item and inventory scheduling, with 0 being the highest priority. |
| Effective Start Date | The date the distribution details take effect. |
| Effective End Date | The date after which the distribution details are no longer applied. |
| Source | |
| Source Ship Node | Choose Source Ship Node and select the applicable node if you are setting up the distribution details to be sourced from a particular ship node. |
| Source Organization | Choose Source Organization and select the applicable organization if you are setting up the distribution details to be sourced from a particular organization. |

### 3.5.8.3 Deleting Advanced Distribution Details

To delete a advanced distribution details:

1. In the Distribution Group Details window, choose the Advanced tab.
2. From the Distribution table, select the applicable distribution details and choose .

#### 3.5.8.4 Deleting a Distribution Group

To delete a distribution group:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose Cross Application > Order Promising > Sourcing And Scheduling > Product Being Shipped > Distribution Rules. The Distribution Group window displays in the work area.
3. Select the applicable distribution group and choose ✕.

### 3.5.9 Defining Sourcing Rules for Product Items

You can define sourcing rules to control what node, external organization, or group of nodes should be considered for sourcing a product based on the following parameters (in order of priority):

- Fulfillment Type
- Order Sourcing Classification
- Seller organization
- Item ID
- Primary Item Classification
- Secondary Item Classification
- Tertiary Item Classification
- Geographical region of the ship to location

**Note:** When a node is passed on an order line, the system uses that node regardless of the sourcing rules you may have configured.

You can use the Sourcing Rules branch for:

- Creating a Product Item Sourcing Rule
- Modifying a Product Item Sourcing Rule
- Deleting a Product Item Sourcing Rule

### 3.5.9.1 Creating a Product Item Sourcing Rule

To create a sourcing rule:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Product Being Shipped > Sourcing Rules. The Product Sourcing Rules Search window displays in the work area.
2. Choose . The Sourcing Rule for Product Being Shipped window displays.
3. Enter information into the applicable fields. Refer to Table 3–22 for field value descriptions.
4. Choose .

Sourcing Rule for Product Being Shipped ( DEFAULT )
Fulfillment Type
Fulfillment Type for Product Sourcing
Order Sourcing Classification
When Seller organization is
This Organization
All Sellers
And Product characteristics are
Item ID
Item Classification
Primary Classification (Product Line)
All Items
And Product is being shipped to
This Region
This Node
The Nodes of Type
Distribution Center
Any Address
Use following sourcing templates in the sequence specified
Sourced From List
Sequence No
Sourcing Template
1
Node: MyNode
Results 1 Of 1

***Table 3–22 Sourcing Rule for Product Being Shipped Window***

| Field | Description |
|---|---|
| Fulfillment Type | Select the applicable fulfillment type to associate with the sourcing rule. For more information about configuring fulfillment types, see Section 3.5.1, "Defining Fulfillment Types". |
| Order Sourcing Classification | Select the applicable order sourcing classification if you want to associate this sourcing rule with a particular order sourcing classification. For more information about configuring order sourcing classifications, see Section 3.5.3, "Defining Order Sourcing Classifications". |
| When Seller organization is | |
| This Organization | Select this option and select the applicable Seller organization if you want to associate this sourcing rule with a particular Seller. |
| All Sellers | Select All Sellers if this sourcing rule can be associated with any Seller organization. |
| And Product characteristics are | |
| Item ID | Select Item ID and enter the applicable item if you want to associate the sourcing rule with a particular item. |
| Item Classification | Select Item Classification and enter the applicable classification if you want to associate the sourcing rule with a particular classification. |
| All Items | Select Apply To All Items At This Source if you want to associate the sourcing rule with all of the items maintained at the source node. |
| And Product is being shipped to | |
| This Region | Select Region and enter the applicable region if you want this sourcing rule to be used when products are shipped to a specific region.<br>**Important:** The region you identify must belong to the region schema associated with product item sourcing for the organization you are working with. For more information about setting an organization's region schema for product items, see Section 3.5.4, "Defining Sourcing Region Selection". |

*Table 3–22 Sourcing Rule for Product Being Shipped Window*

| Field | Description |
|---|---|
| This Node | Select Node and select the applicable node if you want this sourcing rule to be used when products are shipped to this node. |
| Nodes of Type | Select Nodes of Type and select the applicable node types available if you want this sourcing rule to be used when products are shipped to a specific node type. |
| Any Address | Select Any Address and if this sourcing rule can be used when products are shipped to any node. |
| Sourced From List<br>The system tries to source the product from the node/distribution group with the highest sequence (lowest number). If the sourcing template contains a distribution group or a set of nodes, the final node selection is optimized based on the parameters configured in your scheduling rule associated with a given order. For more information about scheduling rules, see Section 3.5.5, "Defining Scheduling Rules".<br>If there is no product availability for a node/distribution group specified in a given sequence, the system tries to source from the next node/distribution group in the sequence. | |
| Sequence No | The sequence priority of the sourcing template. |
| Sourcing Template | A list of the node/distribution group sequences used for sourcing. The sequence is determined by priority. For more information about sourcing templates, see Section 3.5.14, "Defining Sourcing Template Details". |

### 3.5.9.2 Modifying a Product Item Sourcing Rule

To modify a sourcing rule:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Product Being Shipped > Sourcing Rules. The Sourcing Rule for Product Being Shipped Search window displays in the work area.
2. Select the applicable sourcing rule and choose . The Product Sourcing Rules Search window displays.
3. Enter information into the applicable fields. Refer to Table 3–22 for field value descriptions.

4. Choose .

### 3.5.9.3 Deleting a Product Item Sourcing Rule

To delete a sourcing rule:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Product Being Shipped > Sourcing Rules. The Product Sourcing Rules Search window displays in the work area.
2. Select the applicable sourcing rule and choose .

## 3.5.10 Defining Sourcing Rules for Delivery Service Items

You can define sourcing rules to control what node should be considered for sourcing a delivery service based on the fulfillment type, order sourcing classification, delivery region, or deliver to node.

**Note:** When a node is passed on an order line, the system uses that node regardless of the sourcing rules you may have configured.

You can use the Sourcing Rules branch for:

- Creating a Delivery Service Item Sourcing Rule
- Modifying a Delivery Service Sourcing Rule
- Deleting a Delivery Service Sourcing Rule

### 3.5.10.1 Creating a Delivery Service Item Sourcing Rule

To create a sourcing rule:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Product Being Delivered > Sourcing Rules. The Delivery Service Sourcing Rules Search window displays in the work area.
2. Choose . The Sourcing Rule for Product Being Delivered window displays.

3. Enter information into the applicable fields. Refer to Table 3–23 for field value descriptions.
4. Choose .

***Table 3–23 Sourcing Rule for Product Being Delivered Window***

| Field | Description |
|---|---|
| Fulfillment Type | Select the applicable fulfillment type to associate with the sourcing rule. For more information about configuring fulfillment types, see Section 3.5.1, "Defining Fulfillment Types". |
| Order Sourcing Classification | Select the applicable order sourcing classification if you want to associate this sourcing rule with a particular order sourcing classification. For more information about configuring order sourcing classifications, see Section 3.5.3, "Defining Order Sourcing Classifications". |
| When Seller organization is | |
| This Organization | Select this option and select the applicable Seller organization if you want to associate this sourcing rule with a particular Seller. |
| All Sellers | Select All Sellers if this sourcing rule can be associated with any Seller organization. |
| And Product is being delivered to | |
| This Region | Select This Region and enter the applicable region if you want the sourcing rule to be used when deliveries are made to a specific region.<br>**Important:** The region you identify must belong to the region schema associated with delivery service item sourcing for the organization you are working with. For more information about setting an organization's region schema for delivery service items, see Section 3.5.4, "Defining Sourcing Region Selection". |
| This Node | Select This Node and select the applicable node if you want the sourcing rule to be used when deliveries are made to a specific node. |
| Any Address | Select Any Address if this sourcing rule can be used when deliveries are made to any node |
| Use the following Node | |
| Node | Select the node the delivery service is sourced from.<br>**Note:** Delivery service items can only be sourced from one node per sourcing rule. |

*Table 3–23 Sourcing Rule for Product Being Delivered Window*

| Field | Description |
|---|---|
| Procure/Transfer to this Node when inventory is not available. | Check this box if the node handles transfer orders and/or procurement purchase orders. For more information about transfer orders and procurement purchase orders, see Section 3.4.2, "Defining a Node's Relationships" and Section 3.5.13, "Defining Procurement Rules". |
| Sourced From List<br>The system tries to source the product from the node/distribution group with the highest sequence (lowest number). If the sourcing template contains a distribution group or a set of nodes, the final node selection is optimized based on the parameters configured in your scheduling rule associated with a given order. For more information about scheduling rules, see Section 3.5.5, "Defining Scheduling Rules".<br>If there is no product availability for a node/distribution group specified in a given sequence, the system tries to source from the next node/distribution group in the sequence. | |
| Sequence No | The sequence priority of the sourcing template. |
| Sourcing Template | A list of the node/distribution group sequences used for sourcing. The sequence is determined by priority. For more information about sourcing templates, see Section 3.5.14, "Defining Sourcing Template Details". |

### 3.5.10.2 Modifying a Delivery Service Sourcing Rule

To modify a sourcing rule:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Product Being Delivered > Sourcing Rules. The Delivery Service Sourcing Rules Search window displays in the work area.
2. Select the applicable sourcing rule and choose . The Sourcing Rule for Product Being Delivered window displays.
3. Enter information into the applicable fields. Refer to Table 3–23 for field value descriptions.
4. Choose .

#### 3.5.10.3 Deleting a Delivery Service Sourcing Rule

To delete a sourcing rule:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Product Being Delivered > Sourcing Rules. The Delivery Service Sourcing Rules Search window displays in the work area.
2. Select the applicable sourcing rule and choose ✕.

### 3.5.11 Defining Distribution Groups for Provided Service Items

You can create a set of nodes/external organizations that can be used when determining sourcing. You can define distribution groups that establish the ship node determination process based on priority.

You can use the Distribution Rules branch for:

- Creating a Distribution Group
- Deleting a Distribution Group

#### 3.5.11.1 Creating a Distribution Group

To create a distribution group:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Provided Services > Distribution Rules. The Distribution Rules window displays in the work area.
2. Choose ✚. The Distribution Group Detail window displays.

3. In Distribution Group, enter the name of the distribution rule.
4. In Description, enter a brief description of the distribution rule.
5. Choose .

You can use the Distribution Group Details window for:

- Adding Nodes/External Organizations to a Distribution Group
- Modifying a Distribution Group's Node/External Organization
- Deleting a Distribution Group's Node/External Organization

#### 3.5.11.1.1 Adding Nodes/External Organizations to a Distribution Group

To add a node/external organization to a distribution group:

1. In the Distribution Group Details window, choose the Distribution Detail tab.
2. Choose . The Distribution Details pop-up window displays.

3. Enter information into the applicable fields. Refer to Table 3–24 for field value descriptions.
4. Choose .

***Table 3–24 Distribution Details Window***

| Field | Description |
|---|---|
| Source | |
| Source Ship Node | Select Source Ship Node and select the applicable node if you want to add a node within your organization to the distribution group. |
| Source Organization | Select Source Organization and select the applicable organization if you want to add an external organization to the distribution group. |
| Priority | Enter the node/external organization's priority within the distribution group. |

### 3.5.11.1.2 Modifying a Distribution Group's Node/External Organization

To modify a distribution group's node/external organization:

1. In the Distribution Group Details window, choose the Distribution Detail tab.
2. Select the applicable distribution detail and choose . The Distribution Details pop-up window displays.

3. Enter information into the applicable fields. Refer to Table 3–24 for field value descriptions.
4. Choose .

#### 3.5.11.1.3 Deleting a Distribution Group's Node/External Organization

To delete a distribution group's node/external organization:

1. In the Distribution Group Details window, choose the Distribution Detail tab.
2. Select the applicable distribution detail and choose .

### 3.5.11.2 Deleting a Distribution Group

To delete a distribution group:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Provided Services > Distribution Rules. The Distribution Group window displays in the work area.
2. Select the applicable distribution group and choose .

## 3.5.12 Defining Sourcing Rules for Provided Service Items

You can define sourcing rules to control what node, external organization, or group of nodes should be considered for sourcing provided service items based on the following parameters:

- Fulfillment type
- Order sourcing classification
- Seller organization
- Item ID
- Geographical region of the location where the service is to be provided
- Node where the service is to be provided

**Note:** When a node is passed on an order line, the system uses that node regardless of the sourcing rules you may have configured.

You can use the Sourcing Rules branch for:

- Creating a Provided Service Item Sourcing Rule
- Modifying a Provided Service Sourcing Rule
- Deleting a Provided Service Sourcing Rule

### 3.5.12.1 Creating a Provided Service Item Sourcing Rule

To create a sourcing rule:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Provided Services > Sourcing Rules. The Provided Service Sourcing Rules Search window displays in the work area.
2. Choose . The Sourcing Rule for Provided Service window displays.
3. Enter information into the applicable fields. Refer to Table 3–25 for field value descriptions.
4. Choose .

***Table 3–25 Sourcing Rule for Provided Service***

| Field | Description |
|---|---|
| Fulfillment Type | Select the applicable fulfillment type to associate with the sourcing rule. For more information about configuring fulfillment types, see Section 3.5.1, "Defining Fulfillment Types". |
| Order Sourcing Classification | Select the applicable order sourcing classification if you want to associate this sourcing rule with a particular order sourcing classification. For more information about configuring order sourcing classifications, see Section 3.5.3, "Defining Order Sourcing Classifications". |
| When Seller organization is | |

***Table 3–25 Sourcing Rule for Provided Service***

| Field | Description |
|---|---|
| This Organization | Choose This Organization and select the applicable Seller organization if you want to associate this sourcing rule with a particular Seller. |
| All Sellers | Select All Sellers if this sourcing rule can be associated with any Seller organization. |
| And Product characteristics are | |
| Item ID | Enter the provided service item you want to associate the sourcing rule with. |
| And Service Location Is | |
| This Region | Select This Region and enter the applicable region if you want the sourcing rule to be used when a service request is to be provided within a specific region.<br>**Important:** The region you identify must belong to the region schema associated with provided service item sourcing for the organization you are working with. For more information about setting an organization's region schema for provided service items, see Section 3.5.4, "Defining Sourcing Region Selection". |
| This Node | Select This Node and select the applicable node if you want the sourcing rule to be used when a service request is to be provided to a specific node. |
| Any Address | Select Any Address if the sourcing rule can be used when a service request is to be provided for any node. |
| Sourced From List<br>The system tries to source the product from the node/distribution group with the highest sequence (lowest number). If the sourcing template contains a distribution group or a set of nodes, the final node selection is optimized based on the parameters configured in your scheduling rule associated with a given order. For more information about scheduling rules, see Section 3.5.5, "Defining Scheduling Rules".<br>If there is no product availability for a node/distribution group specified in a given sequence, the system tries to source from the next node/distribution group in the sequence. | |

*Table 3–25 Sourcing Rule for Provided Service*

| Field | Description |
|---|---|
| Sequence No | The sequence priority of the sourcing template. |
| Sourcing Template | A list of the node/distribution group sequences used for sourcing. The sequence is determined by priority. For more information about sourcing templates, see Section 3.5.14, "Defining Sourcing Template Details". |

#### 3.5.12.2 Modifying a Provided Service Sourcing Rule

To modify a sourcing rule:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Provided Services > Sourcing Rules. The Provided Service Sourcing Rules Search window displays in the work area.
2. Select the applicable sourcing rule and choose . The Sourcing Rule for Provided Service window displays.
3. Enter information into the applicable fields. Refer to Table 3–25 for field value descriptions.
4. Choose .

#### 3.5.12.3 Deleting a Provided Service Sourcing Rule

To delete a sourcing rule:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Provided Services > Sourcing Rules. The Provided Service Sourcing Rules Search window displays in the work area.
2. Select the applicable sourcing rule and choose .

### 3.5.13 Defining Procurement Rules

You can define the nodes that handle procurement transfer and purchase orders for a specified item or item classification. A chained order is an order that is linked to a parent order in which the lifecycle of one effects the other.

A transfer order is a type of chained order that is created when a node that belongs to the organization you are configuring needs to replenish their stock from another node within the organization to fulfill an order. For information about configuring transfer schedules, see Section 3.4.2, "Defining a Node's Relationships".

A procurement purchase order is a type of chained order that is created when a node that belongs to the organization you are configuring needs to replenish their stock from another node that belongs to a different legal entity organization to fulfill an order.

You can use the Procurement branch for:

- Creating a Sourcing Rule for Procurement
- Modifying a Sourcing Rule for Procurement
- Deleting a Product Procurement Rule
- Creating a Procurement Distribution Group
- Modifying a Procurement Distribution Group
- Deleting a Procurement Distribution Group

### 3.5.13.1 Creating a Sourcing Rule for Procurement

To create product procurement sourcing rules:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Procurement > Sourcing Rules. The Procurement - Sourcing Rule Search window displays in the work area.
2. Choose . The Sourcing Rules for Procurement window displays.
3. Enter information into the applicable fields. Refer to Table 3–26 for field value descriptions.

***Table 3–26 Sourcing Rules for Procurement Window***

| Field | Description |
|---|---|
| Fulfillment Type | Select the applicable fulfillment type to associate with the product procurement rule. For more information about configuring fulfillment types, see Section 3.5.1, "Defining Fulfillment Types". |
| Order Sourcing Classification | Select the applicable order sourcing classification if you want to associate this sourcing rule with a particular order sourcing classification. For more information about configuring order sourcing classifications, see Section 3.5.3, "Defining Order Sourcing Classifications". |
| And Product characteristics are | |
| Item ID | Select Item ID and enter the item you want the node to be able to procure. |

*Table 3–26 Sourcing Rules for Procurement Window*

| Field | Description |
|---|---|
| All Items | Select All Items if you want the node to be able to procure any item. |
| And Procuring To | |
| This Node | Select Node and select the applicable node if you want this sourcing rule to be used when products are shipped to this node. |
| The Nodes of Type | Select Nodes of Type and select the applicable node types available if you want this sourcing rule to be used when products are shipped to a specific node type. |
| Any Node | Select Any Node and if this sourcing rule can be used when products are shipped to any node. |
| Sourced From List<br>The system tries to source the product from the node/distribution group with the highest sequence (lowest number). If the sourcing template contains a distribution group or a set of nodes, the final node selection is optimized based on the parameters configured in your scheduling rule associated with a given order. For more information about scheduling rules, see Section 3.5.5, "Defining Scheduling Rules".<br>If there is no product availability for a node/distribution group specified in a given sequence, the system tries to source from the next node/distribution group in the sequence. | |
| Sequence No | The sequence priority of the sourcing template. |
| Sourcing Template | A list of the node/distribution group sequences used for sourcing. The sequence is determined by priority. For more information about sourcing templates, see Section 3.5.14, "Defining Sourcing Template Details". |

4. Choose .

### 3.5.13.2 Modifying a Sourcing Rule for Procurement

To modify a sourcing rule for procurement:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Procurement > Sourcing Rules. The Procurement - Sourcing Rule Search window displays in the work area.

2. Select the applicable sourcing rule and choose . The Sourcing Rules for Procurement window displays.
3. Enter information into the applicable fields. Refer to Table 3–26 for field value descriptions.
4. Choose .

### 3.5.13.3 Deleting a Product Procurement Rule

To delete a sourcing rule for procurement:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Procurement > Sourcing Rules. The Procurement - Sourcing Rule Search window displays in the work area.
2. Select the applicable sourcing rule and choose .

### 3.5.13.4 Creating a Procurement Distribution Group

To create a distribution group:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Procurement > Distribution Group. The Procurement Distribution Groups window displays in the work area.
2. Choose . The Distribution Group Detail window displays.
3. Enter information into the applicable fields. Refer to Table 3–27 for field value descriptions.

*Table 3–27 Procurement Distribution Group Details Window*

| Field | Description |
|---|---|
| Distribution Group | Enter a name for the distribution group. |
| Description | Enter a description for the distribution group. |
| Distribution Group List<br>Note: The Distribution Group needs to be saved before adding ship nodes. | |
| Ship Node | The identifier for the ship node |

4. Choose .

### 3.5.13.5 Modifying a Procurement Distribution Group

To modify a distribution group:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Procurement > Distribution Group. The Procurement Distribution Groups window displays in the work area.
2. Select the applicable distribution group and choose . The Distribution Group Details window displays.
3. Enter information into the applicable fields. Refer to Table 3–27 for field value descriptions.
4. Choose .

### 3.5.13.6 Deleting a Procurement Distribution Group

To delete a distribution group:

1. From the tree in the application rules side panel, choose Cross Application > Order Promising > Sourcing And Scheduling > Procurement > Distribution Group. The Procurement Distribution Groups window displays in the work area.
2. Select the applicable distribution group and choose .

## 3.5.14 Defining Sourcing Template Details

Sourcing templates enables you to specify a node, a set of nodes, or distribution groups to be used in sourcing rules. For more information about the available sourcing templates, see the *Selling and Fulfillment Foundation: Javadocs*.

From the Sourcing Rule window, you can:

- Applying a Sourcing Template to a Sourcing Rule
- Modifying a Sourcing Template for a Sourcing Rule
- Removing a Sourcing Template from a Sourcing Rule

### 3.5.14.1 Applying a Sourcing Template to a Sourcing Rule

To apply a sourcing template to a sourcing rule:

1. From the Sourcing Rule Window, choose from the Sourced From List panel. The Sourced From Details pop-up window displays.
2. Enter information into the applicable fields. Refer to Table 3–28 for field value descriptions.
3. Choose .

***Figure 3–4 Sourced From Details Window***

***Table 3–28 Sourced From Details Pop-Up Window***

| Field | Description |
|---|---|
| Sequence No | Enter the sequence priority. |
| Template Type | Select a sourcing template from the drop-down list. After choosing a template, it displays dynamically in the lower panel. If applicable, populate the template by clicking as indicated. The search window displays, where you can select the correct entities. |
| Procure/Transfer to this Node when inventory is not available | Check this box if the node handles transfer orders or procurement purchase orders. For more information about transfer orders and procurement purchase orders, see Section 3.4.2, "Defining a Node's Relationships" and Section 3.5.13, "Defining Procurement Rules". |
| Substitution Is Allowed | Check this box if substitution of product items within an order is allowed. |

*Table 3–28 Sourced From Details Pop-Up Window*

| Field | Description |
|---|---|
| Work Order Creation Is Allowed | Check this box if you want to use Work Orders to support compliance services at the node(s). Work Orders describe the service activities to customize items based on a buyer's requests. |
| **Consider the following inventory during sourcing** | |
| All Inventory | Select this option to consider both the onhand and future inventory. |
| Inventory that will be available in the next <number of days> day(s) | Select this option to consider inventory that will be made available in the specified number of days.<br>Enter the number of day(s) in the text box indicating how far in the future from the requested ship date that the inventory should be considered. |
| Only Onhand Inventory | Select this option to consider only onhand inventory. |
| Use Shipping/Delivery Sourcing Rule Inventory Window | Select this option to use the Shipping or Delivery Sourcing Rule Inventory Window. |

**Note:** The Sourced From Details window is applicable for Product Sourcing only.

### 3.5.14.2 Modifying a Sourcing Template for a Sourcing Rule

To modify a sourcing template for a sourcing rule:

1. From the Sourcing Rule Window, select the sourcing template you want to modify from the Sourced From List and choose . The Sourced From Details pop-up window displays.
2. Enter information into the applicable fields. Refer to Table 3–28 for field value descriptions.
3. Choose .

### 3.5.14.3 Removing a Sourcing Template from a Sourcing Rule

To remove a sourcing template from a sourcing rule, from the Sourcing Rule Window, select the Sourced From Detail you want to remove from the Sourced From List and choose .

# 4

# Configuring Cross-Application Service Execution Components

You can use the Service Execution branch for:

- Configuring Service Supervisors
- Configuring Questions

## 4.1 Configuring Service Supervisors

You can specify the supervisor associated with a node for a given seller organization. You can also assign a default supervisor to a node for all seller organizations.

The system allows you assign only one supervisor for a given node and seller organization combination. The default supervisor can only be a supervisor of a node, if no other supervisor is defined for that node and seller organization combination. If both are defined, the supervisor specified for a node and seller organization combination takes precedence over the default supervisor.

**Note:** The supervisor must be a user defined in the context of the node that is being configured. For more information about configuring users, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

You can use the Service Supervisors branch for:

- Defining a Service Supervisor for a Node
- Modifying a Service Supervisor for a Node
- Deleting a Service Supervisor for a Node

## 4.1.1 Defining a Service Supervisor for a Node

To define a service supervisor for a node:

1. From the tree in the application rules side panel, choose Cross Application > Service Execution > Service Supervisors. The Node Supervisor Search window displays.
2. Enter the applicable search criteria and choose . A list of node displays. Select the node to which you want to assign the supervisor and choose . The Supervisor Setup pop-up window displays.

3. Enter information in the applicable fields. See Table 4–1 for field value descriptions.
4. Choose .

*Table 4–1 Supervisor Setup pop-up window*

| Field | Description |
|---|---|
| Default Supervisor | Select the default supervisor from the drop-down list. If a supervisor is not defined for a given seller organization for this node, the user specified becomes that supervisor of the node for all non-specified seller organizations. |
| **Supervisor Setup** | |
| Seller Organization | Select the seller organization from the drop-down list. If you define a seller organization, you must select a supervisor identifier in the Supervisor ID field. |
| Supervisor ID | Select the supervisor identifier from the drop-down list. If you define a supervisor, you must select a seller organization in the Seller Organization field. |

## 4.1.2 Modifying a Service Supervisor for a Node

To modify a service supervisor for a node:

1. From the tree in the application rules side panel, choose Cross Application > Service Execution > Service Supervisors. The Node Supervisor Search window displays.
2. Enter the applicable search criteria and choose . The Nodes list displays. Select the node for which you want to assign a supervisor and choose . The Supervisor Setup pop-up window displays.
3. Enter information in the applicable fields. See Table 4–1 for field value descriptions.
4. Choose .

## 4.1.3 Deleting a Service Supervisor for a Node

To delete a service supervisor for a node:

1. From the tree in the application rules side panel, choose Cross Application > Service Execution > Service Supervisors. The Node Supervisor Search window displays.
2. Enter the applicable search criteria and choose . A list of node displays. Select the node to which you want to assign a supervisor and choose . The Supervisor Setup pop-up window displays.

3. Select the row which contains the seller organization and supervisor ID that you want to delete and choose .
4. Choose .

## 4.2 Configuring Questions

You can define a set of questions that the customer can be asked when it is determined that additional address or permit information is required.

You can use the Questions branch for:

- Defining Address Question Groups
- Modifying Address Question Groups
- Deleting Address Question Groups
- Defining Address Questions
- Modifying Address Questions
- Deleting Address Questions
- Defining Capacity Impact
- Modifying Capacity Impact
- Deleting Capacity Impact
- Rearranging Address Question Entities
- Defining Permit Question Groups
- Modifying Permit Question Groups
- Deleting Permit Question Groups
- Defining Permit Questions
- Modifying Permit Questions
- Deleting Permit Questions
- Rearranging Permit Questionnaire Entities

### 4.2.1 Defining Address Question Groups

1. From the tree in the application rules side panel, choose Cross Application > Service Execution > Questions. The Questions window displays in the work area. The Address Questions tab displays by default.

2. Choose . The Question Group Details pop-up window displays.

***Table 4–2 Question Group Details***

| Fields | |
|---|---|
| Question Group ID | Enter the unique question group ID. |
| Question Group Text | Enter the question group text as you want it to appear in the UI. |

3. Enter information in the applicable fields. See Table 4–5 for field value descriptions.
4. Choose .

**Note:** Identifiers are unique across Question IDs and Question Group IDs.

### 4.2.2 Modifying Address Question Groups

1. From the tree in the application rules side panel, choose Cross Application > Service Execution > Questions. The Questions window displays in the work area. The Address Questions tab displays by default.
2. Select the question group you want to modify and choose . The Question Group Details pop-up window displays.
3. Enter information in the applicable fields. See Table 4–5 for field value descriptions.
4. Choose .

### 4.2.3 Deleting Address Question Groups

1. From the tree in the application rules side panel, choose Cross Application > Service Execution > Questions. The Questions window displays in the work area. The Address Questions tab displays by default.
2. Select the Question Group you want to delete, and choose .

### 4.2.4 Defining Address Questions

1. From the tree in the application rules side panel, choose Cross Application > Service Execution > Questions. The Questions window displays in the work area. The Address Questions tab displays by default.
2. Questions can be defined from the root level, a question group, or an answer option. If a question derives from an answer option, in the console it appears on the questionnaire only when the corresponding answer option has been selected. Follow-up questions cannot be

added to answer options for other follow-up questions, however several follow-up questions can be added to the same answer option for a question. Furthermore, follow-up questions can only be defined off of the 'Yes' Answer Option from a checkbox, or Answer Options whose display control type is Dropdown or Radio Button.

Select the desired location for the question and choose . The Question Details pop-up window displays.

***Table 4–3 Question Details***

| **Fields** | |
|---|---|
| Question ID | Enter the question identifier. |
| Question Text | Enter the question text as you want the question to appear in the UI. |
| Data Type | Select the data type for the answers. The data type you select governs the possible display control type options:<br>Text - Textbox, Text Area, Dropdown, Radio Button<br>Integer - Textbox<br>Decimal - Textbox<br>Boolean - Checkbox |
| Display Control Type | Select how you want the answer options to appear in the UI. The Display Control Types available depend on the Data Type you have selected. |
| **Answer Options** - the following fields appear when you have chosen Dropdown or Radio Button as the desired display control type. | |

*Table 4–3 Question Details*

| Fields | |
|---|---|
| Value | Enter the value for the answer option. |
| Display Text | Enter the answer option text as you want the answer to appear in the UI. |

3. Enter information in the applicable fields. See Table 4–6 for field value descriptions.
4. Choose .

## 4.2.5 Modifying Address Questions

1. From the tree in the application rules side panel, choose Cross Application > Service Execution > Questions. The Questions window displays in the work area. The Address Questions tab displays by default.
2. Select the question you want to modify, and choose . The Question Details pop-up window displays.
3. Enter information in the applicable fields. See Table 4–6 for field value descriptions.
4. Choose .

## 4.2.6 Deleting Address Questions

1. From the tree in the application rules side panel, choose Cross Application > Service Execution > Questions. The Questions window displays in the work area. The Address Questions tab displays by default.
2. Select the question you want to delete, and choose .

## 4.2.7 Defining Capacity Impact

You can define capacity impact for an answer option which is added to the capacity demand on the order, based on service type. You can add different capacity impact values for different service types. There are two types of capacity impact:

**Fixed Capacity Impact** - a fixed capacity value can be added to a 'Yes' Answer Option from a checkbox, or Answer Options whose display control type is Dropdown or Radio Button.

**Capacity Impact Multiplier** - a capacity multiplier value can be added to a Answer Option whose display control type is Integer or Decimal. The value is multiplied by the numeric answer given to determine the amount of capacity to add.

1. From the tree in the application rules side panel, choose Cross Application > Service Execution > Questions. The Questions window displays in the work area. The Address Questions tab displays by default.
2. Select the Answer Option to which you want to add Capacity Impact and click . The Answer Option Details pop-up window displays.

*Table 4–4 Answer Option Details*

| **Fields** | |
|---|---|
| Question ID | The identifier for the question this answer option is for. |
| Question Text | The text for the question this answer option is for. |
| Answer Option Value | The value of the answer option. |
| Answer Option Text | The text for the answer option. |
| **Answer Capacity Impact** | |
| Service Type | Select the Service Type for which capacity is added. |
| Fixed Capacity Impact | If available, enter the amount of capacity you want to add if this answer option is selected. |
| Capacity Impact Multiplier | If available, enter the value you want to multiply the answer by, which determines the amount of capacity to add for this answer option. |
| UOM | The unit of measure for the selected Service Type. This field is not modifiable. |

3. Enter information in the applicable fields. Refer to Table 4–4 for field value descriptions.
4. Choose .

## 4.2.8 Modifying Capacity Impact

1. From the tree in the application rules side panel, choose Cross Application > Service Execution > Questions. The Questions window displays in the work area. The Address Questions tab displays by default.
2. Select the Answer Option for which you want to modify Capacity Impact and click . The Answer Option Details pop-up window displays.
3. Enter information in the applicable fields. See Table 4–4 for field value descriptions.
4. Choose .

## 4.2.9 Deleting Capacity Impact

1. From the tree in the application rules side panel, choose Cross Application > Service Execution > Questions. The Questions window displays in the work area. The Address Questions tab displays by default.
2. Select the Answer Option for which you want to remove Capacity Impact and click . The Answer Option Details pop-up window displays.
3. Select the Capacity Impact you want to delete and choose .

## 4.2.10 Rearranging Address Question Entities

The questionnaire tree represents how the questionnaire appears in the console. By arranging question groups, questions, and answer options, and you modify how you want the questionnaire to appear in the console.

There are two methods you can use to move question groups, questions, and answer options, depending on how you want to move.

Using the and icons, you can move question groups, questions and answer options up and down the questionnaire tree, within the entity it is currently contained in:

- **Questions Groups** - these can be arranged on the questionnaire tree at the root level.
- **Questions** - these can be arranged within a question group, in and out of question groups, and up and down levels.
- **Answer Options** - these can be arranged within a question.

Using the drag and drop functionality, you can:

- Move questions in and out of question groups
- Change a follow-up question into a stand-alone question by dropping onto a question group or the root of the tree
- Change a question into a follow-up question by dropping onto an answer option that allows follow-up questions.

The questionnaire tree represents how the questions appear in the Questionnaire in the console. By arranging question groups, questions, and answer options, and you modify how you want the questionnaire to appear in the console.

## 4.2.11 Defining Permit Question Groups

1. From the tree in the application rules side panel, choose Cross Application > Service Execution > Questions. The Questions window displays in the work area. Select the Permit Questions tab to view the Permit Questions window.

2. Choose . The Question Group Details pop-up window displays.

***Table 4–5 Question Group Details***

| Fields | |
|---|---|
| Question Group ID | Enter the unique question group ID. |
| Question Group Text | Enter the question group text as you want it to appear in the UI. |

3. Enter information in the applicable fields. Refer to Table 4–5 for field value descriptions.
4. Click .

**Note:** Identifiers are unique across Question IDs and Question Group IDs.

### 4.2.12 Modifying Permit Question Groups

1. From the tree in the application rules side panel, choose Cross Application > Service Execution > Questions. The Questions window displays in the work area. Select the Permit Questions tab to view the Permit Questions window.
2. Select the question group you want to modify and click . The Question Group Details pop-up window displays.
3. Enter information in the applicable fields. See Table 4–5 for field value descriptions.
4. Choose .

### 4.2.13 Deleting Permit Question Groups

1. From the tree in the application rules side panel, choose Cross Application > Service Execution > Questions. The Questions window displays in the work area. Select the Permit Questions tab to view the Permit Questions window.
2. Select the Question Group you want to delete, and choose .

### 4.2.14 Defining Permit Questions

1. From the tree in the application rules side panel, choose Cross Application > Service Execution > Questions. The Questions window displays in the work area. Select the Permit Questions tab to view the Permit Questions window.
2. Questions can be defined from the root level, a question group, or an answer option. Questions that are derived from an answer option appear on the questionnaire only when the corresponding answer option has been selected. Follow-up questions cannot be added to

answer options for other follow-up questions, however several follow-up questions can be added to the same answer option for a question. Furthermore, follow-up questions can only be defined off of the 'Yes' Answer Option from a checkbox, or Answer Options whose display control type is Dropdown or Radio Button.

Select the desired location for the question and choose . The Question Details pop-up window displays.

***Table 4–6 Question Details***

| **Fields** | |
|---|---|
| Question ID | Enter the unique question ID. |
| Question Text | Enter the question text as you want the question to appear in the UI. |
| Data Type | Select the data type for the answers. The data type you select governs the possible display control type options:<br>Text - Textbox, Text Area, Dropdown, Radio Button<br>Integer - Textbox<br>Decimal - Textbox<br>Boolean - Checkbox |
| Display Control Type | Select how you want the answer options to appear in the UI. The display control types available depend on the Data Type you have selected. |
| **Answer Options** - the following fields appear when you have chosen Dropdown or Radio Button as the desired display control type. | |

*Table 4–6 Question Details*

| | |
|---|---|
| Value | Enter the value for the answer option. |
| Display Text | Enter the answer option text as you want the answer to appear in the UI. |

3. Enter information in the applicable fields. Refer to Table 4–6 for field value descriptions.
4. Choose .

## 4.2.15 Modifying Permit Questions

1. From the tree in the application rules side panel, choose Cross Application > Service Execution > Questions. The Questions window displays in the work area. Select the Permit Questions tab to view the Permit Questions window.
2. Select the question you want to modify, and choose . The Question Details pop-up window displays.
3. Enter information in the applicable fields. Refer to Table 4–6 for field value descriptions.
4. Choose .

## 4.2.16 Deleting Permit Questions

1. From the tree in the application rules side panel, choose Cross Application > Service Execution > Questions. The Questions window displays in the work area. Select the Permit Questions tab to view the Permit Questions window.
2. Select the question you want to delete, and choose .

## 4.2.17 Rearranging Permit Questionnaire Entities

The questionnaire tree represents how the questionnaire appears in the console. By arranging question groups, questions, and answer options, and you modify how you want the questionnaire to appear in the console.

There are two methods you can use to move question groups, questions, and answer options, depending on how you want to move.

Using the ⇧ and ⇩ icons, you can move question groups, questions and answer options up and down the questionnaire tree, within the entity it is currently contained in:

- **Questions Groups** - these can be arranged on the questionnaire tree at the root level.
- **Questions** - these can be arranged within a question group, in and out of question groups, and up and down levels.
- **Answer Options** - these can be arranged within a question.

Using the drag and drop functionality, you can:

- Move questions in and out of question groups
- Change a follow-up question into a stand-alone question by dropping onto a question group or the root of the tree
- Change a question into a follow-up question by dropping onto an answer option that allows follow-up questions.

The questionnaire tree represents how the questions appear in the Questionnaire in the console. By arranging question groups, questions, and answer options, and you modify how you want the questionnaire to appear in the console.

# 5

# Configuring Cross-Application Logistics Components

You can configure the components used by different logistics related functionality throughout the business application module.

You can use the Logistics branch for:

- Defining Logistics Attributes
- Defining Delivery Codes
- Defining Shipment Modes
- Defining Outbound Constraints

## 5.1 Defining Logistics Attributes

You can define rules and common codes associated logistics of shipping an order.

You can use the Logistics Attributes branch for:

- Defining Freight Terms
- Defining Shipment Modes
- Defining Carrier Modification Reasons
- Defining Additional Logistic Rules

### 5.1.1 Defining Freight Terms

You can define common codes used when associating a freight term to a Carrier. A **freight term** identifies how transportation costs are calculated.

The default freight terms of Selling and Fulfillment Foundation are:

- Cost Insurance and Freight (CIF) - The freight cost is completely paid by either the Seller, the Enterprise, or the Hub.
- Cost and Freight (CFR) - The freight cost is paid by the Buyer and either the Seller, the Enterprise, or the Hub.
- Free On Board (FOB) - The freight cost is paid by the Buyer.

You can use the Freight Terms tab for:

- Creating a Freight Term
- Modifying a Freight Term
- Deleting a Freight Term

### 5.1.1.1 Creating a Freight Term

To create a freight term:

1. From the tree in the application rules side panel, choose Cross Application > Logistics > Logistics Attributes. The Logistics window displays in the work area.
2. Choose the Freight Terms tab.
3. Choose . The Freight Terms Details pop-up window displays.
4. Enter information in the applicable fields. Refer to Table 5–1 for field value descriptions.
5. Enter Choose .

***Table 5–1 Freight Terms Details***

| Field | Description |
|---|---|
| Freight Terms | Enter the name of the freight term. |
| Short Description | Enter a brief description of the freight term. |
| Long Description | Enter a more detailed description of the freight term. |
| Consider Buyer's Routing Guide | Both the Buyer and the Enterprise can establish routing guides (rules for shipping), and Economic Shipping parameters (ESP), which control how items are shipped. In some cases only the Buyer organization has established values for these rules. In other cases, only the enterprise has established values for these rules. If neither is set, then Hub rules are used.<br><br>In cases where both the Buyer and the Enterprise have set values for these rules, this setting determines whether to apply the Buyer's routing rules before applying the routing rules of the Enterprise. See the *Selling and Fulfillment Foundation: Product Concepts Guide* for more information about these shipping concepts. |
| First Buyer then Enterprise | Select to use any shipping rules established by the buyer first. Enterprise rules are applied if no applicable Buyer rule exists. |

*Table 5–1 Freight Terms Details*

| Field | Description |
|---|---|
| First Enterprise then Buyer | Select to use any shipping rules established by the enterprise first. Buyer rules are applied if no applicable Enterprise rule exists. |
| Charges paid by | |
| Buyer | Select this option if the Buyer pays shipping charges. |
| Shipper | Select this option if the Shipper pays shipping charges. |

### 5.1.1.2 Modifying a Freight Term

To modify a freight term:

1. From the tree in the application rules side panel, choose Cross Application > Logistics > Logistics Attributes. The Logistics window displays in the work area.
2. Choose the Freight Terms tab.
3. Select the applicable freight term and choose . The Freight Terms Details pop-up window displays.
4. Enter the new information in the applicable fields. Refer to Table 5–1 for field value descriptions.
5. Choose .

### 5.1.1.3 Deleting a Freight Term

To delete a freight term:

1. From the tree in the application rules side panel, choose Cross Application > Logistics > Logistics Attributes. The Logistics window displays in the work area.
2. Choose the Freight Terms tab.
3. Select the applicable freight term and choose .

## 5.1.2 Defining Carrier Modification Reasons

You can define common codes that appear in the Reason Code drop-down list when you modify a Carrier. This code should provide a standard reason for modifying a Carrier, such as 'Requested Change' which would be used when the customer requests a change of Carrier.

The default carrier modification reason of Selling and Fulfillment Foundation is:

- Requested Change

You can use the Modify Carrier Reason tab for:

- Creating a Carrier Modification Reason
- Modifying a Carrier Modification Reason
- Deleting a Carrier Modification Reason

### 5.1.2.1 Creating a Carrier Modification Reason

To create a carrier modification reason:

1. From the tree in the application rules side panel, choose Cross Application > Logistics > Logistics Attributes. The Logistics window displays in the work area.
2. Choose the Modify Carrier Reason tab.
3. Choose . The Modify Carrier Reason Details pop-up window displays.

4. In Modify Carrier Reason, enter the name of the carrier modification reason.
5. In Short Description, enter a brief description of the carrier modification reason.
6. In Long Description, enter a more detailed description of the carrier modification reason.
7. Choose .

### 5.1.2.2 Modifying a Carrier Modification Reason

To modify a carrier modification reason:

1. From the tree in the application rules side panel, choose Cross Application > Logistics > Logistics Attributes. The Logistics window displays in the work area.
2. Choose the Modify Carrier Reason tab.
3. Select the applicable carrier modification reason and choose . The Modify Carrier Reason Details pop-up window displays.
4. In Short Description, enter a brief description of the carrier modification reason.
5. In Long Description, enter a more detailed description of the carrier modification reason.
6. Choose .

### 5.1.2.3 Deleting a Carrier Modification Reason

To delete a carrier modification reason:

1. From the tree in the application rules side panel, choose Cross Application > Logistics > Logistics Attributes. The Logistics window displays in the work area.
2. Choose the Modify Carrier Reason tab.
3. Select the applicable carrier modification reason and choose .

## 5.1.3 Defining Additional Logistic Rules

You can define additional rules that pertain to an order document type.

To define additional logistic rules:

1. From the tree in the application rules side panel, choose Cross Application > Logistics > Logistics Attributes. The Logistics window displays in the work area.
2. Choose the Other Rules tab.

3. Enter information in the applicable fields. Refer to Table 5–2 for field value descriptions.
4. Choose .

***Table 5–2 Other Rules Tab***

| Field | Description |
|---|---|
| Advance Transit Time Calculation | |
| Use Advanced Transit Time Calculation | Select this field if advance transit time calculation is required when considering ship dates and delivery dates.<br>Transit time is calculated as Lead Time + Distance Per Day (either from the Distance Per Day for a selected Carrier service). |
| Based on SCAC and Carrier Service | Select Based on Carrier if you want transit time calculations to be based on the carrier and carrier service being used for an order. |

***Table 5–2 Other Rules Tab***

| Field | Description |
|---|---|
| Based on Carrier Service | Select Based on Carrier Service if you want transit time calculations to be based on the specific carrier service being used for an order. |
| Delivery Lead Time (Days) | Enter the default delivery lead time.<br>Delivery lead time is used to determine when an order line must be shipped based on the requested delivery date. The delivery lead time indicates the amount of time it takes to transport a load from a ship node to a customer. When calculating the delivery date:<br>• If neither the ship date or delivery date are provided, the ship date is defaulted to the current days date and the delivery date is defaulted to that date + delivery lead time.<br>• If the ship date is provided but the delivery date is not, the delivery date is defaulted to ship date + delivery lead time.<br>• If the delivery date is provided but the ship date is not, the ship date is defaulted to delivery date - delivery lead time.<br>• If both the ship date and delivery date are provided, this rule is not applied. |
| Round Up Transit Time To Nearest Day | If selected, transit time calculations are not specific down to the actual hour. Instead, the system performs the calculations and rounds up to the next available day. |
| Distance Per Day | Enter the default distance for calculating transit time if a Carrier service is not selected or the service selected does not have a distance per day associated with it. |
| UOM | Select the distance unit of measure. |
| Default Carrier Service for Transfer | Select the carrier service you want to use to compute the transfer time between two nodes if they do not have a transfer schedule configured for them.<br>For more information about configuring transfer schedules between nodes, see the appropriate section in this guide. |

# 5.2 Defining Delivery Codes

You can define common codes used for indicating the delivery code when creating or modifying a Carrier. The **delivery code** identifies the entity that pays for the transportation costs.

The default delivery codes of Selling and Fulfillment Foundation are:

- ENTERPRISE
- MARKETPLACE
- SUPPLIER

You can use the Delivery Codes branch for:

- Creating a Delivery Code
- Modifying a Delivery Code
- Deleting a Delivery Code

## 5.2.1 Creating a Delivery Code

To create a delivery code:

1. From the tree in the application rules side panel, choose Cross Application > Logistics > Delivery Codes. The Delivery Codes window displays in the work area.
2. Choose . The Delivery Code Details pop-up window displays.

3. In Delivery Code, enter the name of the delivery code.
4. In Short Description, enter a brief description of the delivery code.
5. In Long Description, enter a more detailed description of the delivery code.
6. Choose .

### 5.2.2 Modifying a Delivery Code

To modify a delivery code:

1. From the tree in the application rules side panel, choose Cross Application > Logistics > Delivery Codes. The Delivery Codes window displays in the work area.
2. Select the applicable delivery code and choose . The Delivery Code Details pop-up window displays.
3. In Short Description, enter a brief description of the delivery code.
4. In Long Description, enter a more detailed description of the delivery code.
5. Choose .

### 5.2.3 Deleting a Delivery Code

To delete a delivery code:

1. From the tree in the application rules side panel, choose Cross Application > Logistics > Delivery Codes. The Delivery Codes window displays in the work area.
2. Select the applicable delivery code and choose .

## 5.3 Defining Shipment Modes

You can define common codes used when indicating the ship mode. The **shipment mode** describes how an order is being shipped.

The default shipment modes of Selling and Fulfillment Foundation are:

- TL - Truckload
- LTL - Less-Than Truckload
- PARCEL

You can use the Shipment Modes tab for:

- Creating a Shipment Mode
- Modifying a Shipment Mode
- Deleting a Shipment Mode

## 5.3.1 Creating a Shipment Mode

To create a shipment mode:

1. From the tree in the application rules side panel, choose Cross Application > Logistics > Shipment Modes. The Shipment Modes window displays in the work area.
2. Choose . The Shipment Mode Details pop-up window displays.

3. In Shipment Mode, enter the name of the shipment mode.
4. In Short Description, enter a brief description of the shipment mode.
5. In Long Description, enter a more detailed description of the shipment mode.
6. Choose .

### 5.3.2 Modifying a Shipment Mode

To modify a shipment mode:

1. From the tree in the application rules side panel, choose Cross Application > Logistics > Shipment Modes. The Shipment Modes window displays in the work area.
2. Select the applicable shipment mode and choose . The Shipment Mode Details pop-up window displays.
3. In Short Description, enter a brief description of the shipment mode.
4. In Long Description, enter a more detailed description of the shipment mode.
5. Choose .

### 5.3.3 Deleting a Shipment Mode

To delete a shipment mode:

1. From the tree in the application rules side panel, choose Cross Application > Logistics > Shipment Modes. The Shipment Modes window displays in the work area.
2. Select the applicable shipment mode and choose .

## 5.4 Defining Outbound Constraints

Outbound constraints are used to describe conditions that control how shipping is done. These include whether certain items can be shipped together, such as regular and rush orders, whether to use Economic Shipping Parameters, and how routing is performed. You can also use Outbound Constraints for:

- Creating a Routing Guide
- Modifying a Routing Guide
- Deleting a Routing Guide

**Note:** the Outbound Constraints node does not apply to Reverse Logistics or Supply Collaboration.

To define outbound constraints:

1. From the tree in the application rules side panel, choose Cross Application > Logistics > Outbound Constraints. The Outbound Constraints window displays in the work area.
2. Enter information in the applicable fields. Refer to Table 5–3 for field value descriptions.
3. Choose .

***Table 5–3 Outbound Constraint Window***

| Field | Description |
|---|---|
| Do not mix in a shipment | If any of the following are selected, separate shipments must be create for items that have different values for these attributes.<br>For example, if Department Code is selected, items that are for different departments can not be included in the same shipment. |
| Buyer Mark For Node Id | The buyer mark for node id. |
| Customer PO # | Customer's Purchase Order number. |
| Department Code | The department for which the item is intended. |
| Gift Flag | The gift flag. |
| Level of Service | The level of service on the order. |
| Mark For | Person for whom this shipment is marked for |
| Order # | The order number. |
| Order Type | The order type. |
| Transportation optimization | |
| Economic shipping parameters maintained | Economic Shipping Parameters (ESP) are used in shipping consolidation. Select this field to enable the following Economic Shipping Parameters fields.<br>ESP support consolidation of shipments until a weight or volume threshold is met, or until an certain time elapses. By consolidating shipments, shipping costs can be reduced<br>For example, you can set that shipments should be consolidated until the shipment weight is 300 pounds, or 50 cubic feet in volume. To ensure that eventually the shipment is set, you can establish a maximum number of days to wait until the conditions are met.<br>When either the weight, volume or delay shipment threshold is met, the shipment is moved to the next stage in shipping. |

*Table 5–3 Outbound Constraint Window*

| Field | Description |
|---|---|
| Delay shipment by not more than __ Days | Enter the number of days this shipment can be delayed before it should be shipped.<br>For example, if a value is set for weight threshold of 300 pounds, and this field has been set to 3 days, the shipment is shipped after 3 days, regardless of whether the weight threshold has been met. |
| Consolidate up to weight threshold of | Enter a weight. |
| Consolidate up to volume threshold of | Enter a volume |
| Routing Guide | |
| Not Maintained | Select this to use manual routing. Shipments are managed in the shipment console, and any routing guides are not consulted. |
| Maintained in Sterling | Select this to use the Routing Guides maintained in Selling and Fulfillment Foundation to determine how shipments should be routed. See Section 5.4.1, "Creating a Routing Guide".<br>In addition to the routing guide maintained here by the enterprise, there may be a routing guide for the buyer organization.<br>For more information about using both buyer and enterprise routing guides, see Section 5.1.1.1, "Creating a Freight Term". |
| Maintained Externally | Select this to indicate that an external routing system is used. The routing guides maintained in Selling and Fulfillment Foundation is not consulted.<br>Examples of external routing systems include using an integrated Transportation Management System (TMS), or implementing a User Exit which consults with the buyer organization. |

## 5.4.1 Creating a Routing Guide

*Routing Guides* are a list of conditions which determine how a shipment should be routed. A routing guide has a time period for which is effective, and conditions for when it should be applied. These conditions are based on Freight Terms and Department.

Each routing guide contains a list of *routing guide lines*, each of which describe detailed conditions for selecting a carrier. The routing guide information is based on data used by VICS (Voluntary InterIndustry Commerce Standards) routing.

To create a routing guide:

1. From the tree in the application rules side panel, choose Cross Application > Logistics > Outbound Constraints. The Outbound Constraints window displays in the work area.
2. Select on the Routing Guides list window. The Routing Guide Details window displays in the work area.
3. Enter information in the applicable fields. Refer to Table 5–4 for field value descriptions.
4. Choose .

***Figure 5–1 Routing Guide Details Window***

***Table 5–4 Routing Guide Details Window***

| Field | Description |
|---|---|
| Name | Enter a name for the routing guide. |
| Routing Guide # | A number for the routing guide. |
| Publish Date | When this routing guide is available within the system. |

***Table 5–4 Routing Guide Details Window***

| Field | Description |
|---|---|
| Supersedes Routing Guide # | Tracking information. For example, if a minor revision is made to routing guide "1234", you might create a routing guide "1234-A", and enter that it supersedes routing guide "1234". This field is for informational purposes and is not used to determine the effective routing guide. |
| Effective Date | The start date for applying the routing information in this routing guide. You can use the effective date and expiration date to apply routing guidelines for particular periods of time. |
| Expiration Date | The end date for applying the routing information in this routing guide. |
| Apply this Routing Guide when | |
| Freight Terms | Apply this routing guide when this condition is met. Select *is*, *is in*, or *is not*. Use:<br>• *is* to specify a single Freight Term.<br>• *is in* to specify a group of Freight Terms, one of which must be matched.<br>• *is not in* to specify a group of Freight Terms. The routing guide is used if the Freight Term does not match one of these values. |
| Item Classification | Items can be classified.<br>**Note:** This field displays when valid item classifications have been set up for Routing Guide. |

## 5.4.2 Modifying a Routing Guide

To modify a routing guide:

1. From the tree in the application rules side panel, choose Cross Application > Logistics > Outbound Constraints. The Outbound Constraints window displays in the work area.
2. Select a routing guide in the Routing Guide list window, and select .

3. The Routing Guide Details window displays in the work area.
4. Enter information in the applicable fields. Refer to Table 5–4 for field value descriptions.
5. Choose .

#### 5.4.2.1 Creating a Routing Guide Line

*Routing guide lines* contain the specific conditions to use when routing a shipment. A routing guide can contain multiple routing guide lines.

When routing occurs, the shipment is matched against the routing guide lines. Based on the criteria specified, a carrier and carrier service is selected.

When routing results in a change to the shipment destination, the system re-routes, with the revised destination as the factor for routing. This type of configuration is used for consolidator nodes. While routing the second time, system looks for the routing guide entry that contains destination node, but without any other destination parameters filled out (such as address, country, etc.).

To create a routing guide line:

1. From the Routing Guide Details window, select the Routing Guidelines Tab. To have access to the Routing Guidelines Tab, save the information you have entered on the Primary Info Tab.
2. A Routing Guide Line search window displays.

***Figure 5–2 Routing Guide Details Window***

3. Select . A Routing Guide Line Details screen displays in the work area.
4. Enter information in the applicable fields. Refer to Table 5–5 for field value descriptions.
5. Choose .

***Figure 5–3 Routing Guide Line Details Window***

***Table 5–5 Routing Guide Line Details***

| Setting conditions:<br>In many of the following fields, you can select is, is in, or is not in and then specify a value. Use:<br>• *is* to specify that a single value must be matched<br>• *is in* to specify a group of values, one of which must be matched.<br>• *is not in* to specify a group of values. The routing guide line is used if none of these values match.<br>For example to match any one of a group of states, specify State *is in* California, Washington, Oregon, Nevada. When assessing the condition, California would match, Florida would not. | |
|---|---|
| **Field** | **Description** |
| Ship From | |
| Node | Select the node. |
| When ship from is not node, select the following attribute(s) | Enter this option if not shipping from the node and then enter one or more of the following conditions. |
| Country | Select the country name(s). |
| State | Enter the state name(s). |
| City | Enter the city name(s). |
| Zip Code | Enter the zip code or zip code range. |
| Ship To | |
| Node | Select the node. |
| Region | Enter the region. |
| When ship to is not node and region, select the following attribute(s) | Select this option if not shipping to a node within a specific region and then select one or more of the following conditions. |
| Country | Select the country name(s). |
| State | Enter the state name(s). |
| City | Enter the city name(s). |
| Zip Code | Enter the zip code or zip code range. |
| Consolidator | Select the consolidator name(s). |

***Table 5–5 Routing Guide Line Details***

| | |
|---|---|
| Store# | Select the store number(s). |
| And weight is in the range: | You can match weight. For example, if you want packages that weigh between 100 and 500 pounds to be shipped using a specific carrier, you would specify From as ‘100’ and To as ‘500’. |
| From | Enter the minimum value. |
| To | Enter the maximum value. |
| And volume is in the range: | You can match volume. For example, if you want packages that are between 3 and 10 cubic feet to be shipped using a specific carrier, you would specify From as ‘3’ and To as ‘10’. |
| From | Enter the minimum value. |
| To | Enter the maximum value. |
| And handling units are in the range: | Number of containers. |
| From | Enter the minimum value. |
| To | Enter the maximum value. |
| And if requested carrier service code is | |
| Carrier Service Code | Select a carrier service code. |
| For more information about defining carrier services, see Section 5.4.2.1.1, "Defining Carrier Services". | |
| Then ship via: | |
| Priority | Indicates the number to give this rule a relative importance.<br>When a shipment is compared to the routing guide lines, there may be two carrier services that could be used. This priority serves as a tie breaker. The carrier service with the lowest number is used. |
| Carrier / Service | Indicates the carrier and service code that is desired. |
| Break Bulk Node | The break bulk node that is close to the buyer. |
| Contact Specified | Indicates whether the contact details for the shipment is specified. |

***Table 5–5 Routing Guide Line Details***

| | |
|---|---|
| With overrides: | |
| Override Freight Terms | Select to override the shipment's Freight Term. |
| Override Ship To | To override the Ship To value, select this field, and then select one of the following. This is only used when performing routing again due to a revised ship to address. |
| Node | Select the node name. |
| Consolidator | Select the consolidator name. |
| Store# | Select the store number. |

When the conditions set are assessed, the routing guide line which matches the most conditions is used. For example, imagine there are three routing guide lines:

*Routing guide line A* - What to do when shipping from Massachusetts

*Routing guide line B* - What to do when shipping from Massachusetts, and when shipping from the zip code 01810.

*Routing guide line C* - What to do when shipping from Massachusetts or NY.

If the shipment originates from the zip code 01810, it matches all of these routing guide lines. The actions specified in *Routing guide line B* is used, as more conditions are met (both the state and the zip code).

If the shipment originates from Massachusetts, but not from zip code 01810, then both *Routing guideline A* and *Routing guide line C* match. The priority on the guidelines are used to determine which is used, with the lowest numbered priority being selected. If *Routing guideline A* had a priority number of 3, and *Routing guideline C* had a priority number of 5, *Routing guideline A* is used.

#### 5.4.2.1.1 Defining Carrier Services

When routing occurs, the shipment is matched against the routing guidelines. Based on the criteria specified, you select a carrier service to use.

You can use the Carrier Services panel for:

- Creating a Carrier Service
- Modifying a Carrier Service
- Deleting a Carrier Service

## Creating a Carrier Service

To create a carrier service:

1. From the Routing Guidelines Details window, in the Carrier Services panel, select . The Carrier Services window displays.

2. Enter information in the applicable fields. Refer to Table 5–6 for field value descriptions.
3. Choose .

*Table 5–6 Carrier Services*

| Field | Description |
|---|---|
| Priority | Enter a number to give this rule a relative importance.<br>When a shipment is compared to the routing guide lines, there may be two carrier services that could be used. This priority serves as a tie breaker. The carrier service with the lowest number is used. |
| Carrier/Service | Select the carrier or service code that is desired. |
| Break Bulk Node | Select the break bulk node that is close to the buyer. |
| Contact Address | This is used to specify the address information for the carrier service's contact person. Click to change the contact Address. |

## Modifying a Carrier Service

To modify a carrier service:

1. From the Routing Guidelines Details window, in the Carrier Services panel, select a carrier service from the list in the Carrier Services list window, and select . The Carrier Services window displays.
2. Enter the new information in the applicable fields. Refer to Table 5–6 for field value descriptions.
3. Choose .

## Deleting a Carrier Service

To modify a carrier service:

1. From the Routing Guidelines Details window, in the Carrier Services panel, select a carrier service in the Carrier Services list window and select .
2. Choose .

#### 5.4.2.2 Modifying a Routing Guide Line

To modify a routing guide line:

1. From the Routing Guidelines Details window, select the Routing Details Tab. A Routing Guide Line search window displays.
2. Select a routing guide line in the Routing Guide Line list window, and select . The Routing Guide Line Details window displays.
3. Enter the new information in the applicable fields. Refer to Table 5–5 for field value descriptions.
4. Choose .

#### 5.4.2.3 Deleting a Routing Guide Line

To delete a Routing Guide Line:

1. From the Routing Guide Lines Details window, select the Routing Details Tab. A Routing Guide Line search window displays.
2. Select a routing guide line in the Routing Guide Line list window, and choose .

### 5.4.3 Deleting a Routing Guide

To delete a routing guide:

1. From the tree in the application rules side panel, choose Cross Application > Logistics > Outbound Constraints. The Outbound Constraints window displays in the work area.
2. Select the applicable Routing Guide and choose .

# 6

# Configuring Cross-Application Payment Components

You can configure the components used in Selling and Fulfillment Foundation to define the types of payment the system accepts and the rules surrounding payment collection.

You can use the Financials branch for:

- Defining Payment Types
- Defining Payment Rules

## 6.1 System Payment Processing Rules

Payment Processing Rules, such as the type of payment, or the order in which multiple payment types are applied, can be determined at either the seller organization or enterprise level. You can also specify whether payment processing is performed for draft orders.

To configure payment processing rules:

1. From the tree in the application rules side panel, select Cross Application > Financials > System Payment Processing Rules. The System Payment Processing Rules window is displayed in the work area.

2. Enter information in the applicable fields. Refer to Table 6–1 for field value descriptions.

***Table 6–1 System Payment Processing Rules Window***

| Field | Description |
|---|---|
| Payment Rule | |
| Use Enterprise of an Order (Instead of the Seller Organization) to Determine Payment Processing Rules | Check this box to enable Payment Processing Rules to be configured at the enterprise level.<br>**Note:** This rule is only supported when using a compatible PCA and not by the Console alone. |
| Draft Order | |
| Enable Draft Order Payment Processing | Check this box to enable payment processing for draft orders.<br>This option is on by default. |
| Ignore Charge Request on Draft Order | Check this box to ignore charge requests when calculating the request amount to authorize on draft orders. Normal charge request processing begins when the draft order is confirmed.<br>This option is off by default and can be configured only when Enable Draft Order Payment Processing is on. |

3. Choose .

## 6.2 Defining Payment Types

You can define common codes for payment types. **Payment types** are the different methods of payment that can be used in financial transactions between organizations, for example, credit card or check.

The default payment types of Selling and Fulfillment Foundation are:

- CHECK
- CREDIT_CARD
- CUSTOMER_ACCOUNT
- OTHER

You can use the Payment Types branch for:

- Creating a Payment Type
- Modifying a Payment Type
- Deleting a Payment Type

### 6.2.1 Creating a Payment Type

To create a payment type:

1. From the tree in the application rules side panel, choose Cross Application > Financials > Payment Types. The Payment Types window displays in the work area.
2. Choose . The Payment Type Details pop-up window displays.
3. Enter information in the applicable fields. Refer to Table 6–2 for field value descriptions.
4. Choose .

***Table 6–2 Payment Type Details Pop-Up Window***

| Field | Description |
|---|---|
| Payment Type | |
| Payment Type | Enter a name for the payment type. |
| Payment Type Group | Select a payment type group |
| Description | Enter a brief description of the payment type. |
| Charge | |

***Table 6–2 Payment Type Details Pop-Up Window***

| Field | Description |
|---|---|
| Charge Sequence | Enter the preferred charge sequence for the payment type, 0 being highest.<br><br>When defining payment types you can set the default order in which payment types are charged. For example, if the Seller organization uses gift certificates and prefers to collect against the gift certificate and then collect any remaining amount against a credit card, you may configure a payment type of Gift Certificate to have a charge sequence of 1 and a payment type of Credit Card to have a charge sequence of 2. For more information about charge sequencing, see the *Selling and Fulfillment Foundation: Product Concepts Guide*. |
| Charge Instead of Authorize | Select this field if you want to create a charge request for this payment type instead of an authorization request.<br><br>This flag is used to trigger the GetFundsAvailable user exit that determines the amount of funds available in the account when a payment type is charged during order processing. For more information about the GetFundsAvailable user exit, see the *Selling and Fulfillment Foundation: Javadocs*. |
| Charge Up To Available | Select this field to allowing charging up to the available amount. This field is only available for payment types in the Stored Value Card payment type group. |

***Table 6–2 Payment Type Details Pop-Up Window***

| Field | Description |
|---|---|
| Charge Consolidation Allowed | Select Charge Consolidation Allowed if you want to consolidate charge requests.<br>If this option is selected, when a charge transaction record is created the collection date for the record is set to the execution date of the authorization + the time you enter in the Consolidation Window (hrs) field. The collection date is the date (and time) after which the executeCollection time-triggered transaction picks up the record(s) for processing.<br>If further charging is required for a given order for the same payment type, the existing charge transaction record is updated instead of a new record being inserted.<br>**Note:** This flag is only applicable to Sales Order document types.<br>**Note:** If the charge is not created from an authorization, it is not taken into consideration for consolidation. |
| Consolidation Window (hrs) | If you selected Charge Consolidation Allowed, enter the timeframe (in hours) for charges to be consolidated within. |
| Refund | |
| Valid for Return | Select Valid for Return if this payment type can be credited according to the Seller's business practices. |
| Refund Sequence | Enter the preferred refund sequence for the payment type, 0 being highest.<br>When defining payment types you can set the default order in which the Seller credits a Buyer's payment types. For example, if the Seller organization prefers to credit a customer's account and then a customer's credit card, you may configure a payment type of Customer Account to have a refund sequence of 1 and a payment type of Credit Card to have a charge sequence of 2. For more information about refund sequencing, see the *Selling and Fulfillment Foundation: Product Concepts Guide*. |

*Table 6–2 Payment Type Details Pop-Up Window*

| Field | Description |
|---|---|
| Default for Return | Select Default for Return to designate this payment type as the default type to be credited in the Return Console. If an order does not have any payments valid for a return, the payment type for which this is selected is used to create a new payment record. |
| Refund To Same Payment Method | Select this field to allow refunds to the same payment method. |
| Refund To New Payment Method | Select this field to allow refunds to a new payment method. |
| Refund To New Payment Method of Payment Type | If you selected 'Refund To New Payment Method' above, use this field to select a new payment type to use.<br>Only payment types in the STORED_VALUE_CARD or OTHER payment type group are available.<br>**Note:** If you select STORED_VALUE_CARD or OTHER, you can select the same payment type and then a new payment method of the same type. For example, if the original payment method was a STORED_VALUE_CARD and an item has been returned, you can issue a new gift card by entering STORED_VALUE_CARD into this field. If you want this new STORED_VALUE_CARD to be a tracked inventory item, enter the Item ID in the 'Create Refund Fulfillment Order Using Item ID' field described below.<br>**Note:** If you specify that you want to refund to a different payment method, configure the refund options for the payment method that will be used. For example, if the original payment method was a CREDIT_CARD and you specify that the new payment method should be a STORED_VALUE_CARD, Selling and Fulfillment Foundation will use the STORED_VALUE_CARD configuration settings, not the CREDIT_CARD settings, for the refund process. |
| When Refunding to a New Payment Method | |
| Use the Following Constraints | Select this option to denote that this payment type has a refund constraint.<br>This allows you to issue a refund using a different payment type if the refund amount is greater than or less than a certain value. |

*Table 6–2 Payment Type Details Pop-Up Window*

| Field | Description |
|---|---|
| If The Refund Amount is | Choose 'Greater Than' or 'Less Than' from the drop-down menu, and enter a refund amount to use as a constraint. |
| Refund Using Payment Type | Choose a refund payment type to use if the constraint is valid. |
| Create Refund Fulfillment Order Using | Select this option to create a refund fulfillment order instead of creating a new payment method. |
| ItemID | From the drop down menu select the Item ID of the item to fulfill the refund. |
| UOM | When you select the Item ID, the corresponding UOM is populated. |
| Create Refund Payment and Charge Request | Select this option to create a refund payment and charge request when refunding to a new payment method. |
| Create Refund Payment and Wait for Payment Information | Select this option to not create a refund charge request. This also raises the Incomplete Payment Information event, if it is enabled. |

## 6.2.2 Modifying a Payment Type

To modify a payment type:

1. From the tree in the application rules side panel, choose Cross Application > Financials > Payment Types. The Payment Types window displays in the work area.
2. Select the applicable payment type and choose . The Payment Type Details pop-up window displays.
3. Enter information in the applicable fields. Refer to Table 6–2 for field value descriptions.
4. Choose .

### 6.2.3 Deleting a Payment Type

To delete a payment type:

1. From the tree in the application rules side panel, choose Cross Application > Financials > Payment Types. The Payment Types window displays in the work area.
2. Select the applicable payment type and choose .

## 6.3 Defining Payment Rules

You can set up the rules that the organization uses at the time of payment collection.

You can use the Payment Rules branch for:

- Creating a Payment Rule
- Modifying a Payment Rule
- Deleting a Payment Rule

### 6.3.1 Creating a Payment Rule

To create a payment rule:

1. From the tree in the application rules side panel, choose Cross Application > Financials > Payment Rules. The Payment Rules window displays in the work area.
2. Choose . The Payment Rule Details pop-up window displays.
3. Enter information in the applicable fields. Refer to Table 6–3 for field value descriptions.
4. Choose .

***Table 6–3 Payment Rule Pop-Up Window***

| Field | Description |
|---|---|
| Payment Rule ID | Enter the payment rule ID as you would like it to appear throughout the system. |
| Publish Invoice | Choose At Creation to publish an order's invoice when it is created.<br>Choose At Collection to publish an order's invoice after payment is collected on the invoice.<br>**Note:** The PUBLISH_INVOICE_DETAIL event must be configured and the Send Invoice time-triggered transaction must be run for an invoice to be published. |

*Table 6–3 Payment Rule Pop-Up Window*

| Field | Description |
|---|---|
| Collect Externally Through Accounts Receivable | If checked, all the invoice details are published to an external accounts receivable system. Any collections performed outside of Selling and Fulfillment Foundation need not be reported.<br>If unchecked, Selling and Fulfillment Foundation handles all financial collections, provided you have programmed the user exits to do so.<br>**Note:** If using an external system to handle your accounts, Collect Externally Through Accounts Receivable must be checked and Settlement Required and Authorization Required must be unchecked. |
| Merchant ID | If the organization uses a third-party agency to handle payments, enter their merchant identifier. |
| Deferred Credit On Return Required | Select Deferred Credit On Return Required if an event should be raised with the cancelled amount that was not refunded when part of a pre-collected order is cancelled. |
| Allow Immediate Refund From Hold Amount | Select Allow Immediate Refund From Hold Amount if you want to instantly refund the credit amount from the pre-collected hold amount to the customer.<br>**Note:** Allow Immediate Refund From Hold Amount is mutually exclusive of Deferred Credit On Return Required. |
| Settlement Required | Select Settlement Required if payments require settlement before they can be processed. |
| Ignore Payment Status For Purge | Select Ignore Payment Status For Purge if you want to purge orders regardless of the payment status of the orders.<br>**Note:** If Settlement Required is selected, Ignore Payment Status For Purge is disabled. |
| Authorization Required | Select Authorization Required if payments require any type of authorization before they can be processed.<br>If you select this rule, an attached Reauthorization pane is enabled with reauthorization options. |

*Table 6–3 Payment Rule Pop-Up Window*

| Field | Description |
|---|---|
| Customer Account Maintained Internally | Select Customer Account Maintained Internally if the payment processing for an account is handled from within Selling and Fulfillment Foundation.<br><br>This rule prevents the YFSCollectionCustomerAccountUE user exit from being called for Authorization if the Customer Payment Method has a limit set for it. |
| Reauthorization | |
| Authorize Before Scheduling And Reauthorize on Expiration | Select this button if you want payment methods to be authorized before scheduling an order and then reauthorized each time the previous authorization expires.<br><br>This rule is the default if Authorization Required is enabled. |
| Use Charge Transaction Request For Authorization | Select Use Charge Transaction Request For Authorization to trigger authorizations by charge transaction request identifiers instead of the order's book amount. Charge transaction request identifiers represent an entity or group of entities in an order. This is not supported if settlement is required.<br><br>**Note:** Authorize Before Scheduling And Reauthorize On Expiration must be selected for Use Charge Transaction Request For Authorization to be enabled. |
| Authorize Before Scheduling and Delay Reauthorization Until | Select this button if you want authorization to take place before the order is scheduled and then to delay reauthorization until the Expected Release Date/Expected Appointment Date.<br><br>If you enter numbers in the Expected Release Date and the Expected Appointment Date fields and the numbers differ, reauthorization will occur on both dates. |
| Hours Before Expected Release Date For Products | Enter the number of hours before the Expected Release Date that you want an authorization for product items to take place. |
| Hours Before Expected Appointment Start Date For Services | Enter the number of hours before Expected Appointment Start Date that you want an authorization for provided and delivery services to take place. |

*Table 6–3 Payment Rule Pop-Up Window*

| Field | Description |
|---|---|
| Delay Authorization Until | Select this button if you want authorization to take place only before the Expected Release Date/Expected Appointment Date. |
| Hours Before Expected Release Date For Products | Enter the number of hours before the Expected Release Date that you want an authorization for product items to take place. |
| Hours Before Expected Appointment Start Date For Services | Enter the number of hours before Expected Appointment Start Date that you want an authorization for provided and delivery services to take place. |

To further explain the business impact of authorization options, Table 6–4, "Standard and Delayed Reauthorization", shows that potentially, many authorizations could take place while awaiting inventory with the standard authorization configuration. Only 1-2 authorizations take place when delayed reauthorization is configured.

*Table 6–4 Standard and Delayed Reauthorization*

| Configuration Options | Before Order is Scheduled | Before Order is Scheduled and Each Time Authorization Expires | <*n*> Hours Before Release |
|---|---|---|---|
| **Authorize Before Scheduling and Reauthorize on Expiration (standard)** | AUTH | AUTH…AUTH…AUTH… | AUTH |
| **Authorize Before Scheduling and Delay Reauthorization Until <*n*> Hours Before Ship Date** | AUTH | | AUTH |

*Table 6–4 Standard and Delayed Reauthorization*

| Configuration Options | Before Order is Scheduled | Before Order is Scheduled and Each Time Authorization Expires | <*n*> Hours Before Release |
|---|---|---|---|
| Delay Authorization Until <*n*> Hours Before Ship Date | | | AUTH |

## 6.3.2 Modifying a Payment Rule

To modify a payment rule:

1. From the tree in the application rules side panel, choose Cross Application > Financials > Payment Rules. The Payment Rules window displays in the work area.
2. Select the applicable payment rule and choose . The Payment Rule Details pop-up window displays.
3. Modify information in the applicable fields. Refer to Table 6–3 for field value descriptions.
4. Choose .

### 6.3.3 Deleting a Payment Rule

To delete a payment rule:

1. From the tree in the application rules side panel, choose Cross Application > Financials > Payment Rules. The Payment Rules window displays in the work area.
2. Select the applicable payment rule and choose .

# 7

# Configuring Cross-Application Pricing Components

**Note:** For the Selling and Fulfillment Foundation Release 9.0:

- The pricing functionality described in Section 7.1, "Legacy Pricing Service", has been deprecated.
- The new pricing functionality for the Selling and Fulfillment Foundation, Release 9.0 is described in Section 7.2, "Pricing Service".
  See the *Business Center: Pricing Administration Guide* and the *Selling and Fulfillment Foundation: Pricing Concepts Guide* for information about these new features.

## 7.1 Legacy Pricing Service

**Note:** To use this deprecated pricing functionality, you must first select the Use Deprecated Pricing Functionality check box in the Installation Rules window. To access this window, from the tree in the Application Platform application rules side panel, choose System Administration > Installation Rules. The Installation Rules window displays in the work area.

You can configure the Pricing Service that is being used throughout Selling and Fulfillment Foundation. From the tree in the Distributed Order

Management application rules side panel, choose Cross Application > Financials. You can use the Financials branch for:

- Defining Pricing by Region
- Defining Price Programs and Price Lists

## 7.1.1 Defining Pricing by Region

You can define the region schema the organization you are configuring uses for product, delivery service, and provided service pricing.

For example, if you are configuring an organization that offers a delivery service that is associated with a region schema in which they deliver to a given metro area region and a suburb region, the organization may want to charge more for delivery in the metro area than the suburbs. In this case you would want to associate a region schema to configure different service pricing for the different regions.

For more information about region schemas, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To define pricing by region:

1. From the tree in the application rules side panel, choose Cross Application > Financials > Region Usage For Pricing. The Region Usage For Pricing pop-up window displays in the work area.
2. Enter information in the applicable fields. Refer to Table 7–1 for field value descriptions.
3. Choose .

***Table 7–1 Region Usage For Pricing Pop-Up Window***

| Field | Description |
|---|---|
| Schema for Product being shipped | Select the region schema you want to use for the organization's product item pricing. |
| Schema for Product being delivered | Select the region schema you want to use for the organization's delivery service pricing. |
| Schema for Provided Service | Select the region schema you want to use for the organization's provided service pricing. |

## 7.1.2 Defining Price Programs and Price Lists

**Note:** This configuration is not required if you are using an external pricing engine.

A price program is a way to offer different pricing to different customers at different times. A price program may have one or more price lists. Each price list defines pricing for a specific currency. A price program definition defines which price list to use for specific time period.

For example, you may want to set up a special price program for your best customers offering items at a discounted price if they order before Christmas. You can create two price lists; "Before" and "After". "Before"

lists each item's discounted price before Christmas. "After" lists the item's regular price after Christmas. You can then create a price program to specify that between now and December 25, orders in that price program are calculated using "Before" and after December 25, using "After".

If a customer orders an item that is part of the price program, but falls outside of the specified date range, quantity range, or currency, the price is calculated as zero. In this case, the CSR must manually enter the price.

**Note:** An organization that is defined as an enterprise cannot inherit price programs from its 'Inherit Configuration from' organization.

**Important:** You must select Allow Price Calculation For Draft Orders to apply pricing during draft order creation for the order document. You must select Allow Price Calculation For Confirmed Orders, if you want to apply pricing during both draft order confirmation and order creation. For more information about this parameter, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

Use the Price Programs and Price Lists branches for:

- Creating a Price List
- Adding Items to a Price List
- Modifying an Item Price List
- Deleting an Item Price List
- Modifying a Price List
- Deleting a Price List
- Creating a Price Program
- Modifying a Price Program
- Deleting a Price Program

- Adding a New Price List to a Price Program
- Modifying a Price List
- Deleting a Price List in a Price Program

### 7.1.2.1 Creating a Price List

To create a price list:

1. From the tree in the application rules side panel, choose Cross Application > Financials > Price Lists. The Price Lists window displays in the work area.
2. Choose . The Price List Details window displays.
3. Enter information in the applicable fields. Refer to Table 7–2 for field values.
4. Choose .

***Table 7–2 Price List Details Window***

| Field | Description |
|---|---|
| Price List Name | Enter the name of the price list. |
| Currency | Select the currency that applies to the items in the price list. |
| Description | Enter a brief description of the price list. |
| Valid Until | Enter the date the price list is valid until. |
| Active | Select Active if you want the price list to be active in the system. |
| Product Price List | Select Product Price List if you want to create a price list for product items. |
| Delivery Service Price List | Select Delivery Service Price List if you want to create a price list for delivery services. |
| Provided Service Price List | Select Provided Service Price List if you want to create a price list for provided services. |

You can use the Price List Details window for:

- Adding Items to a Price List
- Modifying an Item Price List
- Deleting an Item Price List

### Adding Items to a Price List

To add items to a price list:

1. In the Price List Details window, choose from the Item Level Pricing list. The Price List: Item Details window displays.
2. Enter information in the applicable fields. Refer to Table 7–3 for field value descriptions.
3. Choose .

Price List: Item Details ( DEFAULT )
Item ID
SWRadio
UOM
Pounds
Product Class
List Price
0
Retail Price
0
Unit Price By Quantity Range
Region Name
From Quantity
To Quantity
Unit Price
Unit Price For A Quantity Range
Region
From Quantity
To Quantity
Unit Price
Results 0 Of 0

## Modifying an Item Price List

***Table 7–3 Price List: Item Details Window***

| Field | Description |
|---|---|
| Item ID | Enter the item ID for the item you are adding to the price list. |
| UOM | Select a unit of measure for the item. |
| Product Class | Select the product class the item falls under. |
| List Price | Enter the price the item is listed for. |
| Retail Price | Enter the price the item is sold for. |
| Unit Price By Quantity Range | Once the item is created choose to add item price set details.<br><br>Choose to modify a detail.<br><br>Choose to delete a detail. |
| Region | Enter the region that the item pricing is applicable to.<br><br>For example, if you adding a delivery service item that delivers to both a metro region and a suburb region, but charges for delivery to the metro regions, you would create two records: one specifying the metro region and its pricing and one for the suburb region.<br><br>**Note:** This field is optional. If left blank, the quantity pricing range works for any region.<br><br>**Note:** The region specified here must be part of the region schema associated with the item you are creating. For more information about associating a region schema for pricing, see Section 7.1.1, "Defining Pricing by Region". |
| From Quantity | Enter the beginning amount for quantity pricing. |
| To Quantity | Enter the end amount for a price range based on purchase of a particular number of items. |
| Unit Price | Enter the cost per item for that start and end quantity. |

To modify an item price list:

1. In the Price List Details window select the applicable item and choose from the Item Level Pricing list. The Item Price Set Details window

displays.

2. Enter information in the applicable fields. Refer to Table 7–3 for field value descriptions.
3. Choose .

**Deleting an Item Price List**

To delete an item price list, in the Price List Details window, select the applicable item and choose .

### 7.1.2.2 Modifying a Price List

To modify a price list:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose Cross Application > Financials > Price Lists. The Price Lists window displays in the work area.
3. Select the applicable price list and choose . The Price Set Details window displays.
4. In Description, enter a brief description of the price list.
5. Choose .

### 7.1.2.3 Deleting a Price List

To delete a price list:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose Cross Application > Financials > Price Lists. The Price Lists window displays in the work area.
3. Select the applicable price list and choose .

### 7.1.2.4 Creating a Price Program

To create a price program:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose Cross Application > Financials > Price Programs. The Price Programs window displays in the work area.
3. Choose . The Price Program Details window displays.

4. In Price Program Name, enter the name of the price program.
5. In Description, enter a brief description of the price program.
6. Choose .

You can use the Price Program Details window for:

- Adding a New Price List to a Price Program
- Deleting a Price List in a Price Program

### Adding a New Price List to a Price Program

To add a new price list to a price program:

1. In the Price Program Details window, choose from the Price Program Definitions list. The Price Program Definition pop-up window displays.

2. From Price List, select the price list you want to add to the price program.
3. From Currency, select the currency the price list is in.
4. In Start Date, enter the date that the pricing for the items in the price program begins.
5. In End Date, enter the date that the pricing for the items in the price program ends.
6. Choose .

### Deleting a Price List in a Price Program

To delete a price list in a price program, from the Price Program Details window, select the applicable price list and choose .

#### 7.1.2.5 Modifying a Price Program

To modify a price program:

1. From the tree in the application rules side panel, choose Cross Application > Financials > Price Programs. The Price Programs window displays in the work area.
2. Select the applicable Price Program and choose . The Price Program Details window displays.
3. In Description, enter a brief description of the price program.
4. Choose .

#### 7.1.2.6 Deleting a Price Program

To delete a price program:

1. From the tree in the application rules side panel, choose Cross Application > Financials > Price Programs. The Price Programs window displays in the work area.
2. Select the applicable Price Program and choose .

## 7.2 Pricing Service

You can configure the Pricing Service that is being used throughout Selling and Fulfillment Foundation. From the tree in the Distributed Order Management application rules side panel, choose Cross Application > Financials. You can use the Financials branch for:

- Defining Region Schema for Selling
- Defining Pricing Organization Rules
- Defining Pricing Enterprise Rules

**Note:** For information about how to configure prices, see *Business Center: Pricing Administration Guide*.

### 7.2.1 Defining Region Schema for Selling

You can define the region schema the organization you are configuring uses for selling.

For information about defining region schemas for selling, see Section 8.1, "Defining Region Usage for Selling".

### 7.2.2 Defining Pricing Organization Rules

This section describes the rules or configurations that are defined by the pricing organization. These rules affect how the pricing engine calculates prices. In addition, this section describes the rules that affect the Pricing Administration user interface.

To define pricing organization rules:

1. From the tree in the application rules side panel, choose Cross Application > Financials > Pricing Organization Rules. The Pricing Organization Rules: Sales Order window displays.
2. Enter information in the applicable fields. Refer to Table 7–4 for field value descriptions.

3. Choose .

Pricing Organization Rules : Sales Order ( DEFAULT )

Run promotions pricing rules (Item quantity rule) in getItemPrice API

Distribute non-uniform item adjustment across the lines of the same item

Unit Price Precision 6 Total Price Precision 2

Rules For Business Center Application

Maintain Absolute Adjustment

Maintain Percent Adjustment

Maintain Effective Dates On Price List Lines

Maintain Quantity Tiers On Price List Lines

Hide Item Unit Of Measure

Charge Category For Pricing Rules

Charge Category To Be Used For Applying Surcharge For Each Pricing Rule Type

Charge Category For Combination

Charge Category For Item Quantity

Charge Category For Order Total

Charge Category For Ship Order Total

Charge Category For Shipping Surcharge

Charge Category To Be Used For Applying Discount For Each Pricing Rule Type

Charge Category For Combination

Charge Category For Item Quantity

Charge Category For Order Total

Charge Category For Ship Order Total

Charge Category For Shipping Surcharge

Charge Category To Be Used For Applying Discount Coupon For Each Pricing Rule Type

Charge Category For Combination

Charge Category For Ship Order Total

Charge Category For Order Total

Charge Category For Item Quantity

*Table 7–4 Pricing Organization Rules: Sales Order Window*

| Field | Description |
|---|---|
| Run promotions pricing rules (Item quantity rule) in getItemPrice API | Select this check box if you want to run item quantity pricing rules during the getItemPrice API call. The item quantity pricing rules are applied if defined to give additional discounts or uplifts to the price of an item. |
| Distribute non-uniform item adjustment across the lines of the same item | Select this check box if you want to evenly distribute item-level pricing rule or coupon adjustments across order lines that contain the same item. |
| Unit price precision | Calculated prices are rounded to a fixed number of decimal places.<br>Enter the number of decimal places to be applied to unit prices. By default, unit price precision is six decimal places.<br>Sterling Distributed Order Management supports a maximum of six decimal places. |
| Total price precision | Calculated prices are rounded to a fixed number of decimal places.<br>Enter the number of decimal places to be applied to total prices. By default, total price precision is two decimal places.<br>Sterling Distributed Order Management supports a maximum of two decimal places. |
| **Rules For Business Center Application** | |
| Maintain Absolute Adjustment | Select this check box if you want to display the Adjustment (+/-) field in the Pricing Administration user interface. When this field is displayed, you can apply absolute adjustments to the list price of items. |
| Maintain Percent Adjustment | Select this check box if you want to display the Adjustment % (+/-) field in the Pricing Administration user interface. When this field is displayed, you can apply percentage adjustments to the list price of items. |

***Table 7–4 Pricing Organization Rules: Sales Order Window***

| Field | Description |
|---|---|
| Maintain Effective Dates On Price List Lines | Select this check box if you want to display the Effective Date field in the Pricing Administration user interface. When this field is displayed, you can create or change the effective dates of a price list. |
| Maintain Quantity Tiers On Price List Lines | Select this check box if you want the ability to create or modify quantity tiers in the Pricing Administration user interface. |
| Hide Item Unit Of Measure | Select this check box if you want to hide the UOM field in the Pricing Administration user interface.<br>Note: If the UOM field is displayed, the data is not editable. |
| **Charge Category For Pricing Rules**<br>To search for a charge category, choose . | |
| *Charge Category To Be Used For Applying Surcharge For Each Pricing Rule Type* | |
| Charge Category For Combination | Select the charge category to use for applying surcharges for the Combination pricing rule. |
| Charge Category For Item Quantity | Select the charge category to use for applying surcharges for the Item Quantity pricing rule. |
| Charge Category For Order Total | Select the charge category to use for applying surcharges for the Order Total pricing rule. |
| Charge Category For Ship Order Total | Select the charge category to use for applying surcharges for the Ship Order Total pricing rule. |
| Charge Category For Shipping Surcharge | Select the charge category to use for applying surcharges for the Shipping Surcharge pricing rule. |
| *Charge Category To Be Used For Applying Discount For Each Pricing Rule Type* | |
| Charge Category For Combination | Select the charge category to use for applying discounts for the Combination pricing rule. |

*Table 7–4 Pricing Organization Rules: Sales Order Window*

| Field | Description |
|---|---|
| Charge Category For Item Quantity | Select the charge category to use for applying discounts for the Item Quantity pricing rule. |
| Charge Category For Order Total | Select the charge category to use for applying discounts for the Order Total pricing rule. |
| Charge Category For Ship Order Total | Select the charge category to use for applying discounts for the Ship Order Total pricing rule. |
| Charge Category For Shipping Surcharge | Select the charge category to use for applying discounts for the Shipping Surcharge pricing rule. |
| *Charge Category To Be Used For Applying Discount Coupon For Each Pricing Rule Type* | |
| Charge Category For Combination | Select the charge category to use for applying discount coupons for the Combination pricing rule. |
| Charge Category For Ship Order Total | Select the charge category to use for applying discount coupons for the Ship Order Total pricing rule. |
| Charge Category For Order Total | Select the charge category to use for applying discount coupons for the Order Total pricing rule. |
| Charge Category For Item Quantity | Select the charge category to use for applying discount coupons for the Item Quantity pricing rule. |

## 7.2.3 Defining Pricing Enterprise Rules

This section describes the rules that are defined by the enterprise of the pricing organization. These rules control the behavior of the price list selection based on assignments.

To define pricing enterprise rules:

1. From the tree in the application rules side panel, choose Cross Application > Financials > Pricing Enterprise Rules. The Pricing Enterprise Rules window displays.

2. Enter information in the applicable fields. Refer to Table 7–5 for field value descriptions.
3. Choose .

***Table 7–5 Pricing Enterprise Rules Window***

| Field | Description |
|---|---|
| Use The Price List Assigned To The Closest Customer In The Hierarchy | Select this check box if you want to use the price list directly assigned to the customer or, if this price list is not available, use the price list assigned to the closest customer in the customer hierarchy.<br>If you do not select this check box, all price lists in the customer hierarchy that are shared with the child customers are used. |
| Use The Price List Assigned To The Exact Or Closest Region In The Region Hierarchy | Select this check box if you want to use the price list assigned to the exact region or, if this price list is not available, use the price list assigned to the closest region in the region hierarchy.<br>If you do not select this check box, all price lists in the region hierarchy are used. |
| Exclude Attribute Assignments Of A Price List If Direct Assignments Exist | Select this check box if you want to use the price list assigned to a customer, if it exists, rather than the price list assigned to customer attributes.<br>If you do not select this check box, both the price list assigned to the customer and the price list assigned to customer attributes are used. |

# 8

# Configuring Cross-Application Customer Components

You can define the customers that buy from an organization, and attributes about them such as their classification, primary information, and service preferences. You can use the Customer branch for:

- Defining Region Usage for Selling
- Defining Customer Rules
- Defining Customer Definitions
- Defining Contact Types
- Defining Customer Entitlements

## 8.1 Defining Region Usage for Selling

You can define the region schema the organization you are configuring uses for selling.

For example, if you are configuring an organization that offers a product that is associated with a region schema in a given metro area region and a suburb region, the organization may want to charge more for the product in the metro area than in the suburbs. In this case, you would want to associate a region schema to configure different product pricing for the different regions.

Similarly, you can use region schemas to define different entitlements for different regions. For example, you can define a region schema that restricts users in Massachusetts from being able to view and purchase firearms online.

For more information about region schemas, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To define a region usage for selling:

1. From the tree in the application rules side panel, choose Cross Application > Customer > Region Usage For Selling.

   **Note:** If you are using the deprecated pricing functionality, from the tree in the application rules side panel, choose Cross Application > Financials > Region Usage For Pricing. For additional information, see Section 7.1.1, "Defining Pricing by Region".

   The Region Usage For Selling pop-up window displays in the work area.

2. Select a region schema from the drop-down list. Refer to Table 8–1 for the field value description.

***Table 8–1 Region Usage for Selling Pop-Up Window***

| Field | Description |
|---|---|
| Schema for Selling | Select the name of the region schema to use for determining selling regions. |

3. Choose to view the details of the selected region schema. The Region Schema Details pop-up window displays.

4. Enter information in the applicable fields. Refer to Table 8–2 for field value descriptions.

5. Choose .

***Table 8–2 Region Schema Details Pop-Up Window***

| Field | Description |
|---|---|
| Region Schema Name | Enter the name of the region schema. |
| Country | Enter a country code.<br>To search for a country code, choose . In the Search pop-up window, enter applicable search criteria and choose . The search results are displayed in the Country Codes panel. Select a country code and click Select. |
| Description | Enter a brief description of the region schema. |

## 8.2 Defining Customer Rules

You can use the Customer Rules branch for:

- Defining Customer Classifications
- Defining Additional Customer Rules

## 8.2.1 Defining Customer Classifications

You can configure the customer classification codes to associate with a customer identification master. For more information about creating a customer identification master, see Section 8.3, "Defining Customer Definitions".

You can use the Customer Classification branch for:

- Creating a Customer Classification
- Modifying a Customer Classification
- Deleting a Customer Classification

### 8.2.1.1 Creating a Customer Classification

To create a customer classification:

1. From the tree in the application rules side panel, choose Cross Application > Customer > Customer Rules. The Customer Rules window displays in the work area.
2. Click the Customer Classification tab.
3. Click . The Customer Classification Code Details pop-up window displays.

4. In Customer Classification Code, enter the classification ID code.
5. In Short Description, enter a brief description of the classification ID code.
6. In Long Description, enter a more detailed description of the classification ID code.

7. Click .

#### 8.2.1.2 Modifying a Customer Classification

To modify a customer classification:

1. From the tree in the application rules side panel, choose Cross Application > Customer > Customer Rules. The Customer Rules window displays in the work area.
2. Click the Customer Classification tab.
3. Select the applicable customer classification code and click . The Customer Classification Code Details pop-up window displays.
4. In Short Description, enter a brief description of the classification ID code.
5. In Long Description, enter a more detailed description of the classification ID code.
6. Click .

#### 8.2.1.3 Deleting a Customer Classification

To delete a customer classification:

1. From the tree in the application rules side panel, choose Cross Application > Customer > Customer Rules. The Customer Rules window displays in the work area.
2. Click the Customer Classification tab.
3. Select the applicable customer classification code and click .

### 8.2.2 Defining Additional Customer Rules

To define additional customer rules:

1. From the tree in the application rules side panel, choose Cross Application > Customer > Customer Rules. The Customer Rules window displays in the work area.
2. Click the Other Rules tab.

3. In the Service Slot Group Used By Customer For Slot Preference field, select from the drop-down list the identifier of the service slot group that is used to define customer preferences.
4. If you want specific users (or members of a team) to manage the relationship with certain customers, select the Manual User To Customer Assignment Is Required check box. This provides the assigned user with access to all of this customer's orders and related information.
5. When you select the Use Parent Customer For Default Address And Payment check box, and if the customer does not have default address or payment information set, the parent customer's default address or payment information will be used for defaulting on the order.
6. Click .

## 8.3 Defining Customer Definitions

You can configure customer definitions that establish a relationship between an organization and its Buyers. When creating a customer definition, you associate an existing Buyer organization with a specific customer ID and classification. The customer identification uniquely identifies the Buyer organization in instances where multiple ERP systems download Buyer information in to Selling and Fulfillment Foundation.

You can use the Customer Definition branch for:

- Creating a Customer Definition
- Modifying a Customer Definition
- Deleting a Customer Definition

## 8.3.1 Creating a Customer Definition

To create a customer definition:

1. From the tree in the application rules side panel, choose Cross Application > Customer > Customer Definitions. The Customer Search window displays in the work area.
2. Choose . The Customer pop-up window displays.

3. Enter information into the applicable fields. Refer to Table 8–3 for field value descriptions.
4. Choose .

***Table 8–3 Customer Pop-Up Window***

| Field | Description |
|---|---|
| This Customer Is a Business | Select this if the customer with whom you trade participates as a company (as in a B2B scenario). If you choose this option, see Business Customer Details in this table for further information specific to this scenario. |
| This Customer Is a Consumer | Select this if the customer with whom you trade participates as an individual (as in a B2C scenario). If you choose this option, see Business Customer Details in this table for further information specific to this scenario. |
| Customer ID | Enter the unique Identifier. |
| Customer Classification | Select the classification, if applicable. |
| Business Customer Details | |
| Select Existing Organization | Choose this and select the applicable Buyer if you want to associate the customer ID with an existing Buyer organization. |
| Create A New Organization | Choose this if you want to create a new organization to associate with the customer. |
| Organization Code | If you chose Create Buyer Organization, enter the Buyer's organization code. |
| Organization Name | When creating a new organization, enter the Buyer's organization name. |
| This Organization Is Also a Ship To | When creating a new organization, choose this if the organization also functions as a receiving node. |
| DUNS Number | If you chose Create Buyer Organization, enter the Buyer's DUNS number. |
| Account Number With Hub | If you chose Create Buyer Organization, enter the Buyer's account number with the Hub organization. |
| Locale | If you chose Create Buyer Organization, select the Buyer's locale. |
| Identifies This Enterprise As | Enter the customer assigned Vendor Identifier with which the customer identifies this Enterprise. |
| Send Functional Acknowledgement | Check this box if a functional acknowledgment must be sent to the customer. |

*Table 8–3 Customer Pop-Up Window*

| Field | Description |
|---|---|
| Functional Acknowledgement Time (Hrs) | Enter the number of hours taken by the supplier to send the functional acknowledgement. |
| Send Commitment | Check this box if a commitment must be sent to the customer. |
| Commitment Time (Hrs) | Enter the number of hours taken by the supplier to send the commitment. |
| Send ASN | Check this box if an Advanced Shipment Notice (ASN) must be sent to the customer. |
| Consumer Address Details | |
| Address | Enter the consumer's name and shipping address here. |
| Contact Info | Enter the consumer's telephone, cell phone, fax number, and e-mail address. |

## 8.3.2 Modifying a Customer Definition

To modify a customer definition:

1. From the tree in the application rules side panel, choose Cross Application > Customer > Customer Definitions. The Customer Search window displays in the work area.
2. Enter applicable search criteria and choose . A list of customers displays.
3. Locate the applicable customer and choose . The Customer window displays.

You can use the customer window for:

- Defining the Customer's Primary Information
- Defining the Customer's Service Preferences
- Defining a Customer's Scheduling Preferences

### 8.3.2.1 Defining the Customer's Primary Information

The information displayed on the Primary Information tab depends on what type of customer has been defined:

#### 8.3.2.1.1 If the Customer Is a Consumer

If the customer is a consumer, a consumer address panel displays. Click to edit the consumer's address.

A customer that is a consumer may have as many ship to addresses as it wants to define. A child customer in Selling and Fulfillment Foundation is defined as a node organization. Therefore, you can use the Child Customers panel to add, modify, or delete organizations to which products can alternatively be shipped. Use to define a new one, to modify an existing one, or to delete an existing one.

#### 8.3.2.1.2 If the Customer Is a Business

If the customer is a business, an organization field displays, as well as a Ship To inner panel. You can click to edit the organization details. For more information about configuring organizations, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

A business customer may have as many ship to addresses as it may wish to define. A Ship To address in Selling and Fulfillment Foundation is defined as a node organization. Therefore, you can use the Ship To panel to add, modify or delete organizations to which products can alternatively be shipped. Use to define a new one, to modify an existing one, or to delete an existing one.

While creating additional ship to addresses, you may want to specify an organization that is an independent buyer. When a customer is not a buyer organization, it cannot have multiple ship to addresses. Therefore, in the create window that pops up through the Ship To inner panel, the `This Organization Is Also a Ship To` radio button is replaced with a `This Organization Is Also A Buyer` radio button.

### 8.3.2.2 Defining the Customer's Service Preferences

Customers defined in Selling and Fulfillment Foundation can specify slot preferences for deliveries.

*Table 8–4 Service Preferences Tab*

| Field | Description |
|---|---|
| Consider Supplemental Capacity While Planning Appointment By Default | Check this if you want to consider supplemental capacity by default when planning an appointment for this customer. |
| **When Appointments Are Planned For This Customer** | |
| Any Slot Can Be Used | Check this if any slot can be used when planning an appointment for this customer. The Slot Preferences table is hidden then. |
| Specific Slots Must Be Used | Check this if only the slots specified in the Slot Preferences table can be used when planning an appointment for this customer. |
| Customer Prefers Specific Slots (Other Slots Can Be Used) | Check this if the slots specified in the Slot Preferences table preferred slot table |
| **Slot Preferences** | |
| Slot | The name of the slot. |
| Start Time | The start time of the slot, in 24 hour format. |
| End Time | The end time of the slot, in 24 hour format. |
| Sun | Check this if you want this slot to be part of the customer's preferred slots. |
| Mon | Check this if you want this slot to be part of the customer's preferred slots. |
| Tue | Check this if you want this slot to be part of the customer's preferred slots. |
| Wed | Check this if you want this slot to be part of the customer's preferred slots. |
| Thu | Check this if you want this slot to be part of the customer's preferred slots. |
| Fri | Check this if you want this slot to be part of the customer's preferred slots. |
| Sat | Check this if you want this slot to be part of the customer's preferred slots. |

### 8.3.2.3 Answering a Customer's Address Questions

Answering address questions for a customer populates answers for address questions the next time this customer places an order. From the Service Preferences tab, select the Address Questions tab. If configured, the address questions configured for the Enterprise appear.

### 8.3.2.4 Defining a Customer's Scheduling Preferences

You can define scheduling constraints for a specific customer by specifying these scheduling preferences. Refer to Table 8–5 for more information.

***Table 8–5 Scheduling Preferences Tab***

| Field | Description |
|---|---|
| **Constraints** | |
| Ship from Single Node | Check this box to ensure that orders are shipped from a single node. This automatically checks the Line Ship from Single Node checkbox. |
| Line Ship from Single Node | Check this box to ensure that order lines are shipped from a single node. This is disabled if the Ship from Single Node checkbox is checked. |
| Ship Complete | Check this box to ensure that orders are shipped complete. This automatically checks the Line Ship Complete checkbox. |

*Table 8–5 Scheduling Preferences Tab*

| Field | Description |
|---|---|
| Line Ship Complete | Check this box to ensure that order lines are shipped complete. This is disabled if the Ship Complete checkbox is checked. |
| **Inventory Controls** | |
| Cancel Order For Inventory Shortage | Check this box to cancel the backordered quantity in the event of inventory shortage. |
| Allow Item Substitution If Inventory Is Not Available | Check this box to allow item substitution if inventory for the selected item is not available. |
| **Sourcing Controls** | |
| Allow Scheduling Against The Node That Requires Drop Ship Chained Order Creation | Check this box to allow scheduling against the node that requires a drop-shipped chained order to be created. |

**Note:** Constraints passed at the order level override customer scheduling preferences.

### 8.3.2.5 Defining Customer Contacts

You can define multiple contacts for each customer. These contacts represent individuals at a customer location. Please refer to Table 8–6 for more information.

*Table 8–6 Customer Contacts Tab*

| Field | Definition |
|---|---|
| Customer Contact ID | The ID of the customer contact. |
| Last Name | The contact's last name. |

***Table 8–6 Customer Contacts Tab***

| Field | Definition |
|---|---|
| First Name | The contact's first name. |
| Email Address | The contact's e-mail address. |
| User ID | The user ID of the contact. |
| Spending Limit | The contact's spending limit, if defined. |

#### 8.3.2.5.1 Defining Customer Contact Information

To define customer contact information:

1. From the Customer Definition screen, select the Contacts tab. The Customer Contact Info screen displays.
2. Choose to add an additional customer contact.
3. Select the Customer Contact Info tab.
4. Enter information in the applicable fields. Refer to Table 8–7 for field values.
5. Choose OK.

***Table 8–7 Customer Contact Info***

| Field | Description |
|---|---|
| **Name** | |
| First Name | Enter the contact's first name. |
| Middle Name | Enter the contact's middle name. |
| Last Name | Enter the contact's last name. |
| Company | Enter the company at which the contact works. |

*Table 8–7 Customer Contact Info*

| Field | Description |
|---|---|
| **Phone** | |
| Day Time Phone | Enter the contact's day time phone number. |
| Evening Phone | Enter the contact's evening phone number. |
| Cell Phone | Enter the contact's cellular phone number. |
| Fax | Enter the contact's fax number. |
| Email | Enter the contact's email address. |
| User ID | Enter the contact's user ID. |
| Date Of Birth | Enter the contact's date of birth. |
| Spouse Date Of Birth | Enter the contact's spouse's date of birth. |
| Wedding Anniversary | Enter the contact's wedding anniversary. |
| Customer Contact ID | Enter the contact's customer contact ID. |

#### 8.3.2.5.2 Defining Limits for Customer Contacts

To define limits for customer contacts:

1. From the Customer Definition screen, select the Contacts tab. The Customer Contact Info screen displays.
2. Choose to add an additional customer contact.
3. Select the Limits tab.
4. Enter information in the applicable fields. Refer to Table 8–8 for field value descriptions.
5. Choose OK.

***Table 8–8 Limits***

| Field | Description |
|---|---|
| **Approval** | |
| Spending Limit | Enter the spending limit for the customer contact.<br>Choose the currency in which the spending limit is configured from the drop-down list.<br><br>To create a new currency, choose and enter information to the applicable fields. For more information about defining the currency, see Section 3.5.6.1, "Currency Details". |
| Approver User ID | Enter the user ID of the primary approver. |
| Approver Proxy | Enter the proxy for the approver. |

### 8.3.2.5.3 Defining Additional Contact Addresses

1. From the Customer Definition screen, select the Contacts tab. The Customer Contact Info screen displays.
2. Choose to add an additional customer contact information. The Customer Contact Info screen displays.
3. Select the Additional Addresses tab.

4. Refer to Step 2 in section Section 8.3.2.6, "Defining Additional Addresses" for information about defining additional addresses.

### 8.3.2.6 Defining Additional Addresses

You can define multiple additional or alternative addresses for a customer or contact. See Table 8–9 for field value descriptions.

***Table 8–9 Additional Addresses Tab***

| Field | Description |
|---|---|
| Additional Address ID | The ID of the additional address. |
| Is Ship To | This field appears checked if the address is configured as a ship to address. |
| Is Default Ship To | This field appears checked if the address is configured as the default ship to address. |
| Is Bill To | This field appears checked if the address is configured as a bill to address. |
| Is Default Bill To | This field appears checked if the address is configured as the default bill to address. |

**To define an additional address:**

1. From the Customer Definition screen, select the Additional Address tab. The Additional address screen displays.
2. Choose to add an additional address.
3. Enter information in the applicable fields. Refer to Table 8–10 for field values.
4. Choose to enter the additional address.
5. Choose OK.

***Table 8–10 Defining an Additional Address***

| Field | Description |
|---|---|
| Additional Address ID | Enter an ID for the additional address |
| Is Bill To | Check this box if this is a bill to address. |
| Is Default Bill To | Check this box if this is the default bill to address. |
| Is Ship To | Check this box if this is a ship to address. |

*Table 8–10 Defining an Additional Address*

| Field | Description |
|---|---|
| Is Default Ship To | Check this box if this is the default ship to address. |
| Is Sold To | Check this box if this is a sold to address. |
| Is Default Sold To | Check this box if this is the default sold to address. |

### 8.3.3 Deleting a Customer Definition

To delete a customer definition:

1. From the tree in the application rules side panel, choose Cross Application > Customer > Customer Definitions. The Customer Search window displays in the work area.
2. Enter applicable search criteria and choose . A list of customers displays.
3. Locate the applicable customer and choose .

## 8.4 Defining Contact Types

You can configure the contact types of both business and consumer customers when specifying the contact information of a customer on work order notes. For more information about creating a customer, see Section 8.3, "Defining Customer Definitions".

You can use the Contact Types branch for:

- Creating a Contact Type
- Modifying a Contact Type
- Deleting a Contact Type

### 8.4.1 Creating a Contact Type

To create a contact type:

1. From the tree in the application rules side panel, choose Cross Application > Customer > Contact Types. The Customer Contact Types window displays in the work area.
2. Click . The Contact Type Details pop-up window displays.

3. In Contact Type, enter the contact type.
4. In Short Description, enter a brief description of the contact type.
5. In Long Description, enter a more detailed description of the contact type.
6. Click .

## 8.4.2 Modifying a Contact Type

To modify a contact type:

1. From the tree in the application rules side panel, choose Cross Application > Customer > Contact Types. The Customer Contact Types window displays in the work area.
2. Select the applicable contact type and click . The Contact Type Details pop-up window displays.
3. In Short Description, enter a brief description of the contact type.
4. In Long Description, enter a more detailed description of the contact type.
5. Click .

### 8.4.3 Deleting a Contact Type

To delete a contact type:

1. From the tree in the application rules side panel, choose Cross Application > Customer > Contact Types. The Contact Types window displays in the work area.
2. Select the contact type and click ✕.

## 8.5 Defining Customer Entitlements

You can define a customer entitlement strategy for the enterprise by specifying rules for enforcing customer entitlements.

To define a customer entitlement strategy:

1. From the tree in the application rules side panel, choose Cross Application > Customer > Customer Entitlement. The Customer Entitlement window displays in the work area.
2. In the Enforce Customer Entitlement Based On field, select from the drop-down list the customer entitlement strategy that is used for the enterprise. Refer to Table 8–11 for field value descriptions.
3. If you want to use direct entitlement assignments, select the Use Direct Entitlement Assignment, If Exists check box.
4. Click 💾.

***Table 8–11 Customer Entitlement Strategy***

| Field | Description |
|---|---|
| Enforce Customer Entitlement Based On | Select the type of customer entitlement strategy you want to use for enforcing customer entitlements:<br>You can choose from the following options:<br>• No Item Entitlement - Customers can access all items regardless of customer entitlements and pricelists.<br>• Item Entitlement Rules Assigned to Customer - Customers can access only the items that are assigned to the customer in customer entitlements.<br>• Pricelists Assigned to Customer - Customers can access only the items that are assigned to the customer in pricelists.<br>• Intersection of Item Entitlement Rules and Pricelists Assigned to Customer - Customers can access only the items that are assigned to the customer in both pricelists and customer entitlements. |

# 9

# Configuring a Document's Attributes

**You can** define common codes as they pertain to order documents viewed in the Application Consoles.

You can use the Order Attributes branch for

- Defining Order Types
- Defining Order Sources
- Defining External References for the Order Level
- Defining External References for the Order Line Level
- Defining Order Address Types
- Defining Line Types
- Defining Other Attributes

## 9.1 Defining Order Types

You can define codes for order types that appear on a document type. This code has no application logic associated with it and can be set up as per your business practices. Examples of order types are Consumer Orders, Service Rep Orders, and Retail Orders.

You can use the Order Types tab for:

- Creating an Order Type
- Modifying an Order Type
- Deleting an Order Type

## 9.1.1 Creating an Order Type

To create an order type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Attributes. The Order Attributes window displays in the work area.
2. Choose the Order Types tab.
3. Choose . The Order Type Details pop-up window displays.

4. In Order Type, enter the name of the order type.
5. In Short Description, enter a brief description of the order type.
6. In Long Description, enter a more detailed description of the order type.
7. Choose .

## 9.1.2 Modifying an Order Type

To modify a order type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Attributes. The Order Attributes window displays in the work area.
2. Choose the Order Types tab.
3. Select the applicable order type and choose . The Order Type Details pop-up window displays.

4. In Short Description, enter a brief description of the order type.
5. In Long Description, enter a more detailed description of the order type.
6. Choose .

### 9.1.3 Deleting an Order Type

To delete a order type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Attributes. The Order Attributes window displays in the work area.
2. Choose the Order Types tab.
3. Select the applicable order type and choose .

## 9.2 Defining Order Sources

You can define codes for order sources that appear on a document type. This code has no application logic associated with it and can be set up as per your business practices.

You can use the Order Sources tab for:

- Creating an Order Source
- Modifying an Order Source
- Deleting an Order Source

### 9.2.1 Creating an Order Source

To create an order source:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Attributes. The Order Attributes window displays in the work area.
2. Choose the Order Sources tab.
3. Choose . The Order Source Details pop-up window displays.

4. In Order Source, enter the name of the order source.
5. In Short Description, enter a brief description of the order source.
6. In Long Description, enter a more detailed description of the order source.
7. Choose .

## 9.2.2 Modifying an Order Source

To modify a order source:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Attributes. The Order Attributes window displays in the work area.
2. Choose the Order Sources tab.
3. Select the applicable order source and choose . The Order Source Details pop-up window displays.
4. In Short Description, enter a brief description of the order source.
5. In Long Description, enter a more detailed description of the order source.
6. Choose .

### 9.2.3 Deleting an Order Source

To delete a order source:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Attributes. The Order Attributes window displays in the work area.
2. Choose the Order Sources tab.
3. Select the applicable order source and choose .

## 9.3 Defining External References for the Order Level

You can define codes for external references that appear on a document type at the order level. This code has no application logic associated with it and can be set up as per your business practices. You can create, modify, and delete external references.

You can use the Order References tab for:

- Creating an External Reference for the Order Header Level
- Modifying an External Reference for the Order Header Level
- Deleting an External Reference for the Order Header Level

### 9.3.1 Creating an External Reference for the Order Header Level

To create an order reference for the order level:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Attributes. The Order Attributes window displays in the work area.
2. Choose the Order References tab.
3. From the Order Header External References list choose . The External Reference Details pop-up window displays.

4. In External Reference, enter the name of the external reference.
5. In Short Description, enter a brief description of the external reference.
6. In Long Description, enter a more detailed description of the external reference.
7. Choose .

## 9.3.2 Modifying an External Reference for the Order Header Level

To modify an external reference for the order level:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Attributes. The Order Attributes window displays in the work area.
2. Choose the Order References tab.
3. In Order Header External References select the applicable external reference and choose . The External Reference Details pop-up window displays.
4. In Short Description, enter a brief description of the external reference.
5. In Long Description, enter a more detailed description of the external reference.
6. Choose .

### 9.3.3 Deleting an External Reference for the Order Header Level

To delete an external reference for the order level:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Attributes. The Order Attributes window displays in the work area.
2. Choose the Order References tab.
3. In Order Header External References select the applicable external reference and choose .

## 9.4 Defining External References for the Order Line Level

You can define codes for external references that appear on a document type at the order line level. This code has no application logic associated with it and can be set up as per your business practices. You can create, modify, and delete external references.

You can use the Order References tab for:

- Creating an External Reference for the Order Line Level
- Modifying an External Reference for the Order Line Level
- Deleting an External Reference for the Order Line Level

### 9.4.1 Creating an External Reference for the Order Line Level

To create an order reference for the order line level:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Attributes. The Order Attributes window displays in the work area.
2. Choose the Order References tab.
3. From the Order Line External References list choose . The External Reference Details pop-up window displays.

4. In External Reference, enter the name of the external reference.
5. In Short Description, enter a brief description of the external reference.
6. In Long Description, enter a more detailed description of the external reference.
7. Choose .

## 9.4.2 Modifying an External Reference for the Order Line Level

To modify an external reference for the order line level:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Attributes. The Order Attributes window displays in the work area.
2. Choose the Order References tab.
3. In Order Line External References select the applicable external reference and choose . The External Reference Details pop-up window displays.
4. In Short Description, enter a brief description of the external reference.
5. In Long Description, enter a more detailed description of the external reference.
6. Choose .

### 9.4.3 Deleting an External Reference for the Order Line Level

To delete an external reference for the order level:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Attributes. The Order Attributes window displays in the work area.
2. Choose the Order References tab.
3. In the Order Line External References list select the applicable external reference and choose .

## 9.5 Defining Order Address Types

You can define codes for order address types that appear in the Additional Addresses view in the User Interface for a document type.

You can use the Order Address Types tab for:

- Creating an Order Address Type
- Modifying an Order Address Type
- Deleting an Order Address Type

### 9.5.1 Creating an Order Address Type

To create an order address type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Attributes. The Order Attributes window displays in the work area.
2. Choose the Order Address Types tab.
3. Choose . The Order Address Type Details pop-up window displays.

4. In Order Address Type, enter the name of the order address type.
5. In Short Description, enter a brief description of the order address type.
6. In Long Description, enter a more detailed description of the order address type.
7. Choose .

## 9.5.2 Modifying an Order Address Type

To modify a order address type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Attributes. The Order Attributes window displays in the work area.
2. Choose the Order Address Types tab.
3. Select the applicable order address type and choose . The Order Address Type Details pop-up window displays.
4. In Short Description, enter a brief description of the order type.
5. In Long Description, enter a more detailed description of the order type.
6. Choose .

### 9.5.3 Deleting an Order Address Type

To delete a order address type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Attributes. The Order Attributes window displays in the work area.
2. Choose the Order Address Types tab.
3. Select the applicable order address type and choose .

## 9.6 Defining Line Types

You can define codes and for line types that appear on a document type.

You can use the Line Types tab for:

- Creating a Line Type
- Modifying a Line Type
- Deleting a Line Type

### 9.6.1 Creating a Line Type

To create a line type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Attributes. The Order Attributes window displays in the work area.
2. Choose the Line Types tab.
3. Choose . The Line Type Details pop-up window displays.
4. In Line Type, enter the name of the line type.
5. In Description, enter a brief description of the line type.
6. Choose .

## 9.6.2 Modifying a Line Type

To modify a line type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Attributes. The Order Attributes window displays in the work area.
2. Choose the Line Types tab.
3. Select the applicable line type and choose . The Line Type Details pop-up window displays.
4. In Description, enter a brief description of the line type.
5. Choose .

## 9.6.3 Deleting a Line Type

To delete a line type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Attributes. The Order Attributes window displays in the work area.
2. Choose the Line Types tab.
3. Select the applicable line type and choose .

# 9.7 Defining Other Attributes

You can define other attributes that appear on the document type.

You can use the Others tab for:

- Generating a Prime Line Number for a New Line from a Pre-Configured Number

## 9.7.1 Generating a Prime Line Number for a New Line from a Pre-Configured Number

Generating a prime line number for a new line from a pre-configured number prevents conflicts between prime line numbers in Selling and Fulfillment Foundation and in an external system when order synchronization occurs.

To specify a pre-configured starting number:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Attributes. The Order Attributes window displays in the work area.
2. Choose the Others tab.
3. In Generate Prime Line No. For New Line Starting From, enter the starting number. The starting prime line number must be a positive integer
4. Choose .

**Note:** The value entered in the "Generate Prime Line Number for New Line Starting From:" field only affects orders created through the Console UI, not through direct API calls (e.g. createOrder()).

# 10

# Configuring a Document's Order Validation

You can define the configuration for defaulting Seller and Buyer validation during order creation for a particular Enterprise and document type. This validation is used to determine the Sellers and Buyers available to create an order for, and narrows the search results in the Application Consoles based on the validation type you configured.

For example, you are configuring a Hub environment with 10 Enterprises, 50 Sellers, and 100 Buyers. A particular Enterprise only interacts with 10 of the 50 Sellers and 25 of the 100 Buyers as defined in the organization hierarchy. If you set both the Seller and Buyer validations to 'Defined In The Enterprise Hierarchy', when a user creates an order the system verifies that the Seller on the order is one of the 10 Sellers defined in the Enterprise's hierarchy and the Buyer on the order is one of the 25 Buyers defined in the Enterprise's hierarchy. Also, if the user chooses the lookup for either the Seller or Buyer fields, only the Sellers and Buyers defined for the Enterprise appear in the results.

To define an order document's order validation:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Order Validation. The Order Validation pop-up window displays in the work area.
2. Enter information into the applicable fields. Refer to Table 10–1 for field value descriptions.
3. Choose .

Order Validation
Seller Validation
None
Buyer Validation
None
Validate Bill To Id As Customer Id
Validate Vendor Id
Validate Item

***Table 10–1 Order Validation Pop-Up Window***

| Field | Description |
|---|---|
| Seller Validation | Select the type of validation you want to use to verify the Seller on the order document.<br>You can choose from the following options:<br>• None - No validation is performed for Sellers on an order. All Sellers in the system can be used during order creation. Also, all Sellers in the system display when the Seller lookup is chosen in the Application Consoles.<br>• Same As Enterprise - The system validates the Seller on the order is the Enterprise.<br>• Defined In The Enterprise Hierarchy - The system validates that the Seller on the order is defined within the Enterprise's organizational hierarchy. Also, only the Sellers defined within the Enterprise's organizational hierarchy display when the Seller lookup is chosen in the Application Consoles. For more information about configuring the organizational hierarchy, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.<br>Customer Of The Enterprise - The system validates that the Seller on the order has been configured as a customer. Also, only the organizations defined as customers of the Enterprise display when the Seller lookup is chosen in the Application Consoles. |

***Table 10–1 Order Validation Pop-Up Window***

| Field | Description |
|---|---|
| Buyer Validation | Select the type of validation you want to use to verify the Buyer on the order document.<br>You can choose from the following options:<br>• None - No validation is performed for Buyers on an order. All Buyers in the system can be used during order creation. Also, all Buyers in the system display when the Buyer lookup is chosen in the Application Consoles.<br>• Same As Enterprise - The system validates the Buyer on the order is the Enterprise.<br>• Defined In The Enterprise Hierarchy - The system validates that the Buyer on the order is defined within the Enterprise's organizational hierarchy. Also, only the Buyers defined within the Enterprise's organizational hierarchy display when the Buyer lookup is chosen in the Application Consoles. For more information about configuring the organizational hierarchy, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.<br>• Customer Of The Enterprise - The system validates that the Buyer on the order has been configured as a customer. Also, only the organizations defined as customers of the Enterprise display when the Buyer lookup is chosen in the Application Consoles. |
| Validate Bill To ID As Customer ID | Select Validate Bill To ID As Customer ID if you want to validate that the customer ID on an order is defined for the Enterprise. |
| Validate Vendor ID | Select Validate Vendor ID if you want to validate that the vendor ID on an order is defined for the Enterprise. |
| Validate Item | Select Validate Item if you want to validate that the product items on the order belong to the Enterprises catalog. Service items, on the other hand, always need to exist within Selling and Fulfillment Foundation. |

# 11

# Configuring a Document's Instruction Types

You can define the common codes used when adding special instructions to an order document.

The default instruction types of Selling and Fulfillment Foundation are:

- PICK
- PACK
- SHIP
- GIFT
- ORDERING
- OTHER

You can use the Instruction Types branch for:

- Creating an Instruction Type
- Modifying an Instruction Type
- Deleting an Instruction Type

## 11.1 Creating an Instruction Type

To create an instruction type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Instruction Types. The Instruction Types window displays in the work area.
2. Choose . The Instruction Type Details pop-up window displays.

3. In Instruction Type, enter the instruction type.
4. In Short Description, enter a brief description of the instruction type.
5. In Long Description, enter a more detailed description of the instruction type.
6. Check Automatically Copy Item Instruction with Matching Type To Order Line to force the system to automatically copy item instructions with matching instruction types to order lines when the items are added onto an order.
7. Choose .

## 11.2 Modifying an Instruction Type

To modify an instruction type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Instruction Types. The Instruction Types window displays in the work area.
2. Select the applicable instruction type and choose . The Instruction Type Details pop-up window displays.
3. In Short Description, enter a brief description of the instruction type.
4. In Long Description, enter a more detailed description of the instruction type.

5. Check Automatically Copy Item Instruction with Matching Type To Order Line to force the system to automatically copy item instructions with matching instruction types to order lines when the items are added onto an order.
6. Choose .

## 11.3 Deleting an Instruction Type

To delete an instruction type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Instruction Types. The Instruction Types window displays in the work area.
2. Select the applicable instruction type and choose .

# 12

# Configuring a Document's Modification Reasons

You can define common codes for **modification reasons**. These codes define why a modification was made by a user in the Application Consoles.

> **Note:** In addition to modification reasons, the codes that you define are used as hold reasons when you put an order on hold in the Application Consoles.

You can use the Modification Reasons branch for:

- Creating a Modification Reason
- Modifying a Modification Reason
- Deleting a Modification Reason

## 12.1 Creating a Modification Reason

To create a modification reason:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Modification Reasons. The Modification Reasons window displays in the work area.
2. Choose . The Modification Reason Details pop-up window displays.

3. In Modification Reason, enter the modification reason.
4. In Short Description, enter a brief description of the modification reason.
5. In Long Description, enter a more detailed description of the modification reason.
6. If this modification reason requires that the order be re-priced due to a reduced quantity, check the Re-Price Order With Reduced Quantity checkbox.

   This flag is applicable only if this modification reason is used for cancellations, where re-pricing needs to occur against a reduced quantity: the quantity against which the order line is re-priced (re-pricing quantity) is adjusted to the reduced quantity. For more information about re-pricing quantity, see the *Selling and Fulfillment Foundation: Javadocs*.

   **Note:** If this modification reason is used for a modification which does not reduce quantity, this flag is not applicable.

   **Note:** This field does not exist for Load Modification Reasons.

7. Choose .

## 12.2 Modifying a Modification Reason

To modify a modification reason:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Modification Reasons. The Modification Reasons window displays in the work area.
2. Select the applicable modification reason and choose . The Modification Reason Details pop-up window displays.
3. In Short Description, enter a brief description of the modification reason.
4. In Long Description, enter a more detailed description of the modification reason.
5. If this modification reason requires that the order be re-priced due to a reduced quantity, check the Re-Price Order With Reduced Quantity checkbox.

   This flag is applicable only if this modification reason is used for cancellations, where re-pricing needs to occur against a reduced quantity: the quantity against which the order line is repriced (re-pricing quantity) is adjusted to the reduced quantity. For more information about re-pricing quantity, see the *Selling and Fulfillment Foundation: Javadocs*.

   **Note:** If this modification reason is used for a modification which does not reduce quantity, this flag is not applicable.

   **Note:** This field does not exist for Load Modification Reasons.

6. Choose .

## 12.3 Deleting a Modification Reason

To delete a modification reason:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Modification Reasons. The Modification Reasons window displays in the work area.
2. Select the applicable modification reason and choose .

# 13

# Configuring a Document's Backorder Reasons

You can define common codes for **backorder reasons**. These codes describe why an order was backordered.

The default backorder reason of Selling and Fulfillment Foundation is:

- No Stock

You can use the Backorder Reasons branch for:

- Creating a Backorder Reason
- Modifying a Backorder Reason
- Deleting a Backorder Reason

## 13.1 Creating a Backorder Reason

To create a backorder reason:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Backorder Reasons. The Backorder Reasons window displays in the work area.
2. Choose . The Backorder Reason Details pop-up window displays.

3. In Backorder Reason, enter the backorder reason.
4. In Short Description, enter a brief description of the backorder reason.
5. In Long Description, enter a more detailed description of the backorder reason.
6. Choose .

## 13.2 Modifying a Backorder Reason

To modify a backorder reason:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Backorder Reasons. The Backorder Reasons window displays in the work area.
2. Select the applicable backorder reason and choose . The Backorder Reason Details pop-up window displays.
3. In Short Description, enter a brief description of the backorder reason.
4. In Long Description, enter a more detailed description of the backorder reason.
5. Choose .

## 13.3 Deleting a Backorder Reason

To delete a backorder reason:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Backorder Reasons. The Backorder Reasons window displays in the work area.
2. Select the applicable backorder reason and choose .

# 14

# Configuring a Document's Note Reasons

You can define reason codes for entering a note. These codes define why a note was entered by a user in the Console.

You can use the Note Reasons branch for:

- Creating a Note Reason
- Modifying a Note Reason
- Deleting a Note Reason

## 14.1 Creating a Note Reason

To create a note reason:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Note Reasons. The Note Reasons window displays in the work area.
2. Choose . The Note Reason Details window displays.

3. In Note Reason, enter the note reason as you want it to appear throughout the system.
4. In Short Description, enter a brief description of the note reason.
5. In Long Description, enter a more detailed description of the note reason.
6. Choose .

## 14.2 Modifying a Note Reason

To modify a note reason:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Note Reasons. The Note Reasons window displays in the work area.
2. Select the applicable appointment failure reason and choose . The Note Reason Details window displays.
3. In Short Description, enter a brief description of the note reason.
4. In Long Description, enter a more detailed description of the note reason.
5. Choose .

## 14.3 Creating a New Note Reason Based on an Existing One

To create a new note reason based on an existing one:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Note Reasons. The Note Reasons window displays in the work area.
2. Select the applicable note reason and choose . The Note Reason Details window displays.
3. Enter information in the applicable fields.
4. Choose .

## 14.4 Deleting a Note Reason

To delete a note reason:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Note Reasons. The Note Reasons window displays in the work area.
2. Select the applicable appointment failure reason and choose ✕. The Confirmation window displays.
3. Choose OK.

# 15

# Configuring a Quote Document's Approval Rule Violation Reason

You can define reason codes to explain why an approval rule has been violated.

You can use the Approval Rule Violation Reasons branch in the Distributed Order Management tree structure for:

- Creating an Approval Rule Violation Reason
- Modifying an Approval Rule Violation Reason
- Creating a New Approval Rule Violation Reason Based on an Existing One
- Deleting an Approval Rule Violation Reason

## 15.1 Creating an Approval Rule Violation Reason

To create an approval rule violation reason:

1. From the tree in the application rules side panel, select Document Specific > Quote > Approval Rule Violation Reasons. The Approval Rule Violation Reasons window is displayed in the work area.

2. Click . The Approval Rule Violation Reason Details window is displayed.

3. In Approval Rule Violation Reason, enter the approval rule violation reason as you want it to appear throughout the system.
4. In Short Description, enter a brief description of the approval rule violation reason.
5. In Long Description, enter a detailed description of the approval rule violation reason.
6. Click .

## 15.2 Modifying an Approval Rule Violation Reason

To modify an approval rule violation reason:

1. From the tree in the application rules side panel, select Document Specific > Quote > Approval Rule Violation Reasons. The Approval Rule Violation Reasons window is displayed in the work area.
2. Select the applicable approval rule violation reason and click . The Approval Rule Violation Reason Details window is displayed.
3. In Short Description, modify the brief description of the approval rule violation reason.
4. In Long Description, modify the more detailed description of the approval rule violation reason.
5. Click .

## 15.3 Creating a New Approval Rule Violation Reason Based on an Existing One

To create a new approval rule violation reason based on an existing one:

1. From the tree in the application rules side panel, select Document Specific > Quote > Approval Rule Violation Reasons. The Approval Rule Violation Reasons window is displayed in the work area.
2. Select the applicable approval rule violation reason and click . The Approval Rule Violation Reason Details window is displayed.
3. Enter information in the applicable fields.
4. Click .

## 15.4 Deleting an Approval Rule Violation Reason

To delete an approval rule violation reason:

1. From the tree in the application rules side panel, select Document Specific > Quote > Approval Rule Violation Reasons. The Approval Rule Violation Reasons window is displayed in the work area.
2. Select the applicable approval rule violation reason and click . The Confirmation window is displayed.
3. Click OK.

# 16

# Configuring a Document's Line Relationship Type

You can define the relationship types used when linking two related lines together. These relationships are used to group similar products together on an order.

## 16.1 Defining a Line Relationship Type

To create a line relationship type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Line Relationship Type. The Line Relationship Type window appears in the work area.
2. Choose . The Line Relationship Details window appears.

3. In Relationship Type, enter the relationship type as you want it to appear throughout the system.
4. In Short Description, enter a brief description of the relationship type.
5. In Long description, enter a more detailed description of the relationship type.
6. To enable sorting on this relationship type, check the Consider For Sorting checkbox.
7. Choose .

## 16.2 Modifying a Line Relationship Type

To modify a line relationship type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Line Relationship Type. The Relationship Type window appears in the work area.
2. Select the applicable relationship and choose . The Relationship Type Details window appears.
3. In Short Description, enter a brief description of the relationship type.
4. In Long description, enter a more detailed description of the relationship type.
5. To enable sorting on this relationship type, check the Consider For Sorting checkbox.
6. Choose .

# 16.3 Creating a New Line Relationship Type Based on an Existing One

To create a new line relationship type based on an exiting one.

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Line Relationship Type. The Relationship Type window appears in the work area.
2. Select the applicable relationship type and choose . The Relationship Type Details window appears.
3. Enter information in the applicable fields
4. Choose .

## 16.3.1 Deleting a Line Relationship Type

To delete a line relationship type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Line Relationship Type. The Relationship Type window appears in the work area.
2. Select the applicable relationship type and choose . The Confirmation window appears.
3. Choose OK.

# 17

# Configuring an Opportunity Document's Lead Origin

You can define the lead origin of an opportunity, which indicates from where the opportunity originated. For example, you may define lead origins such as Trade Show, Call Center, and Existing Customer.

You can use the Lead Origin branch for:

- Creating a Lead Origin
- Modifying a Lead Origin
- Creating a New Lead Origin Based on an Existing One
- Deleting a Lead Origin

## 17.1 Creating a Lead Origin

To create a lead origin:

1. From the tree in the application rules side panel, choose Opportunity > Lead Origin. The Lead Origins window displays in the work area.
2. Choose . The Lead Origin Details window displays.

3. In Lead Origin, enter the lead origin as you want it to appear throughout the system.
4. In Short Description, enter a brief description of the lead origin.
5. In Long Description, enter a more detailed description of the lead origin.
6. Choose .

## 17.2 Modifying a Lead Origin

To modify a lead origin:

1. From the tree in the application rules side panel, choose Opportunity > Lead Origin. The Lead Origins window displays in the work area.
2. Select the applicable lead origin and choose . The Lead Origin Details window displays.
3. In Short Description, enter a brief description of the lead origin.
4. In Long Description, enter a more detailed description of the lead origin.
5. Choose .

## 17.3 Creating a New Lead Origin Based on an Existing One

To create a new lead origin based on an existing one:

1. From the tree in the application rules side panel, choose Opportunity > Lead Origin. The Lead Origins window displays in the work area.
2. Select the applicable lead origin and choose . The Lead Origin Details window displays.
3. Enter information in the applicable fields.
4. Choose .

## 17.4 Deleting a Lead Origin

To delete a lead origin:

1. From the tree in the application rules side panel, choose Opportunity > Lead Origin. The Lead Origins window displays in the work area.
2. Select the applicable lead origin and choose . The Confirmation window displays.
3. Choose OK.

# 18

# Configuring an Opportunity Document's Lost Reason

You can define reason codes for why an opportunity is lost.

You can use the Lost Reason branch for:

- Creating a Lost Reason
- Modifying a Lost Reason
- Creating a New Lost Reason Based on an Existing One
- Deleting a Lost Reason

## 18.1 Creating a Lost Reason

To create a lost reason:

1. From the tree in the application rules side panel, choose Opportunity > Lost Reason. The Lost Reasons window displays in the work area.
2. Choose . The Lost Reason Details window displays.

3. In Lost Reason, enter the lost reason as you want it to appear throughout the system.
4. In Short Description, enter a brief description of the lost reason.
5. In Long Description, enter a more detailed description of the lost reason.
6. Choose .

## 18.2 Modifying a Lost Reason

To modify a lost reason:

1. From the tree in the application rules side panel, choose Opportunity > Lost Reason. The Lost Reasons window displays in the work area.
2. Select the applicable lost reason and choose . The Lost Reason Details window displays.
3. In Short Description, enter a brief description of the lost reason.
4. In Long Description, enter a more detailed description of the lost reason.
5. Choose .

## 18.3 Creating a New Lost Reason Based on an Existing One

To create a new lost reason based on an existing one:

1. From the tree in the application rules side panel, choose Opportunity > Lost Reason. The Lost Reasons window displays in the work area.
2. Select the applicable lost reason and choose . The Lost Reason Details window displays.
3. Enter information in the applicable fields.
4. Choose .

## 18.4 Deleting a Lost Reason

To delete a lost reason:

1. From the tree in the application rules side panel, choose Opportunity > Lost Reason. The Lost Reasons window displays in the work area.
2. Select the applicable lost reason and choose . The Confirmation window displays.
3. Choose OK.

# 19

# Configuring a Document's Modification Components

You can configure the modification rules and types of a document when it is in a specific status. These rules determine which parts of a document can be modified as well as in which status the modifications can be performed.

If you are using the Distributed Order Management module, you can configure modification components at the following process type levels:

- Fulfillment
- Outbound Logistics

If you are using the Logistics Management module, you can configure modification components at the load process type level.

If you are using the Supply Collaboration module, you can configure modification components at the following process type levels:

- Fulfillment
- Inbound Logistics

If you are using the Reverse Logistics module, you can configure modification components at the following process type levels:

- Fulfillment
- Logistics
- Receipt

You can use the Order Modification branch for:

- Defining Modification Rules
- Defining Custom Modification Types
- Defining Modifications Impacting Pricing

# 19.1 Defining Modification Rules

Most documents flow through a pipeline without requiring any intervention by a customer service representative. However, there are times when modifications are required, such as changing credit card information or quantity. Selling and Fulfillment Foundation supports modification through the Console and APIs. It is critical for you to decide which modifications are allowed for each modification type, modification level, and status combination.

**Important:** Contemplate business and system integration implications before allowing a modification that is disallowed as part of the system defaults. For example, adding instructions to a sales order document type is disallowed after the release has been sent to the node. If you change the modification to be allowed, the system has no way of communicating the new instruction to the node center because the release has already been sent.

The modification type indicates the type of modification carried out on a document. Selling and Fulfillment Foundation provides the ability to perform modifications on specific attributes. An example of a modification type is adding an order line to an order.

Modification level indicates the level at which a particular modification type is carried out. These include the following levels:

- Header
- Line
- Release
- Release Line
- Negotiation

- Negotiation Line
- Shipment
- Receipt

For a complete list of the system modification types and their modification levels, see Appendix B, "Order Modification Types".

Modifications are applied to a particular level and a particular processing status. For example, if modifications are requested for a document at the header level or at the line level, then the order lines, as well as the order release lines, are picked up for validating whether or not modifications are allowed for those order statuses. If modifications are requested at the release or release line level, then order release lines are picked up for validating whether or not modifications are allowed for those order statuses.

You can group modifications in the Modification Rules window by modification type, modification level, or status, by selecting the corresponding grouping from Group By. The Modification Rules window then displays the grouping you have chosen in a hierarchical structure.

All modification rules operate within a certain system-defined range. For instance, for Sales Orders, the Cancel modification on the order entity is always defined to be between the statuses 1000 (Draft Order Created) and 3350 (Included In Shipment). The system never allows a Cancel modification at a status of 3701 (Return Created). On the other hand, you are able to allow modifications between the statuses 1000 and 3350. If an entity is in multiple statuses, the modification is allowed, provided that at least one of the statuses is within the system-defined range.

If you make modifications such as changing a Bill To address after an order has shipped or a return has been created, the changed Bill To address will not be propagated to the shipment, the return order, and so forth.

The following table defines the different settings you can apply to modifications:

***Table 19–1 Order Document Type Rule Modifications***

| Field | Description |
|---|---|
| Status | Indicates each status that is applicable to a modification level and type. |
| Allow | Indicates whether or not modifications may be made at this modification level and type for the specified status. |
| Disallow | Indicates that no modifications may be made at this modification level and type for the specified status. |
| Ignore | Indicates that modifications are ignored at this modification level and type for the specified status. |
| There are several scenarios to consider for the Allow, Disallow, and Ignore settings:<br>• If one line is in status 1 and another line is in status 2 - and both statuses are set to Allow, the modification is allowed.<br>• If one line is in status 1, another line is in status 2, and another is in status 3 - and the 1 and 2 statuses are set to Allow, but the 3 status is set to Disallow, all modifications are disallowed, because one of the currently applied statuses is disallowed.<br>• If one line is in status 1 and one is in the extended status 2 - If the 1 status is set to Allow, but the extended status is set to Ignore (all extended statuses are defaulted to ignore, so that they pick up their base status settings unless you have explicitly overridden the setting) then all modifications are allowed only if the base status is set to allow. If the base status is set to disallow, then all modifications are disallowed.<br>If all lines are set to Ignore, then all modifications are disallowed, regardless of the base status settings. | |

**Note:** Application Console users can be granted permission to override the modification rules through user group permissions. When a user has been granted this permission, the user can perform a modification that has been disallowed within the Application Consoles. For more information about configuring user group permissions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

### 19.1.1 Changing Modification Rules

To change modification rules:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > *(Process Type)* > *(Process Type)* Modification > *(Process Type)* Modification Rules. The Modification Rules window displays in the work area.

2. Expand the applicable modification types and levels for which you want to set up rules.
3. Right click on the applicable rule and choose allow, disallow, or ignore as per your business practices. Refer to Table 19–1 for field value descriptions.

## 19.2 Defining Custom Modification Types

You can define custom modification types for a process type. Creating a modification type allows you to classify certain attributes (including extended attributes) into one group for which rules that determine when these attributes can and cannot be modified can be defined.

Once created, the custom modification type displays under the modification rules for the business document of the process type you are defining. From there you can decide whether to allow, disallow, or ignore

the custom modification type for a given status. For more information about modification types and rules see Section 19.1, "Defining Modification Rules".

You can use the Order Modification Types branch for:

- Creating a Custom Modification Type
- Modifying a Custom Modification Type
- Deleting a Custom Modification Type

### 19.2.1 Creating a Custom Modification Type

To create a custom modification type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > *(Process Type)* > *(Process Type)* Modification > *(Process Type)* Modification Types. The Custom Modification List window displays in the work area.
2. From the Custom Modification List, choose . The Custom Modification window displays.Enter information in the applicable fields. Refer to Table 19–2 for field value descriptions.
3. Choose . A pop-up warning you to sign out of the application for changes to take place displays.

***Table 19–2 Custom Modification Window***

| Field | Description |
|---|---|
| Modification Level | Select the level of the modification type. For example, Header, Line, or Release. |
| Modification Type | Enter the name of the modification type. |
| Description | Enter a brief description of the modification type. |
| Min. Allowed Status | Select the minimum status the modification type can be performed at. |
| Max Allowed Status | Select the maximum status the modification type can be performed at. |

*Table 19–2 Custom Modification Window*

| Field | Description |
|---|---|
| Available | A list of XML attributes that can be associated with the modification type. To add an available attribute to the modification type, select the attribute you want to add and choose ⇨. |
| Subscribed | A list of XML attributes that have been associated with the modification type. To remove a subscribed attribute, select the attribute you want to remove and choose ⇦. |

## 19.2.2 Modifying a Custom Modification Type

To modify a custom modification type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > *(Process Type)* > *(Process Type)* Modification > *(Process Type)* Modification Types. The Custom Modification List window displays in the work area.
2. From the Custom Modification List, locate the applicable Custom Modification and choose . The Custom Modification window displays.
3. Enter information in the applicable fields. Refer to Table 19–2 for field value descriptions.
4. Choose .

## 19.2.3 Deleting a Custom Modification Type

To delete a custom modification type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > *(Process Type)* > *(Process Type)* Modification > *(Process Type)* Modification Types. The Custom Modification List window displays in the work area.
2. From the Custom Modification List, locate the applicable Custom Modification and choose .

# 19.3 Defining Modifications Impacting Pricing

You can specify whether a modification type impacts pricing on an order. When modifications of these modification types occur, `OrderRepricingUE` is called to update price and charge information at the level indicated for that modification type. For more information about `OrderRepricingUE`, see the *Selling and Fulfillment Foundation: Javadocs*.

## 19.3.1 Adding/Removing a Modification Type for Modifications Impacting Pricing

To specify whether a modification type has pricing impact:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > *(Process Type)* > *(Process Type)* Modification > Modifications Impacting Pricing. The Modifications Impacting Pricing List window displays in the work area.
2. From the Modifications Impacting Pricing List, choose . The Modification Type List window displays.
3. To add a modification type to the Modifications Impacting Pricing list, select the desired modification type(s) from the Modification Types and choose .
4. To remove a modification type from the Modifications Impacting Pricing list, select the desired modification type(s) from the Modification Types and choose .
5. Choose .

# 19.4 Defining Modifications Requiring Auditing

You can specify which modification types will require an audit after being completed.

To specify which modification types require an audit:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Order Modification > Modifications Requiring Auditing. The Modifications Requiring Auditing window displays in the work area.

2. From the Modifications Requiring Auditing window, choose .

> **Note:** When opening the Modifications Requiring Auditing screen for the first time, all modification types are listed as requiring audits.

3. To add a modification type to the Modifications Requiring Auditing list, select the desired modification type(s) from the Modification Types column and choose .
4. To remove a modification type from the Modifications Requiring Auditing list, select the desired modification type(s) from the Modification Types column and choose .
5. Choose .

# 20

# Configuring an Order Document's Fulfillment-Specific Components

To complete an order document's lifecycle, each document has a set of different processes that it can go through. These processes are called process types. Every order document has a defined set of process types in Selling and Fulfillment Foundation.

The following process types are defined in Selling and Fulfillment Foundation for the order document types:

- Order Fulfillment
- Order Negotiation
- Outbound Shipment

You can configure the rules and components specific to an order document's fulfillment process type.

You can use process type configuration for:

- Defining Hold Types
- Defining Order Tags
- Defining Fulfillment Rules
- Defining Approval Plans for Quotes
- Defining Process Type Details
- Process Type Pipeline Configuration
- Defining Transaction Rules
- Defining Status Inventory Types

- Defining Quote Rules
- Defining Monitoring Components
- Defining Monitoring Events
- Defining Transaction Dependencies

# 20.1 Defining Hold Types

Orders and order lines can be placed on hold manually or automatically, by applying a particular hold type. Certain transactions can be configured to not process documents that are on a specific type of hold. Likewise, modification types can be configured to not process documents that are on a specific type of hold. By default, all transactions and modification types are allowed to process all documents for all hold types.

The transactions that can be prevented from processing orders or order lines on a specific type of hold have the checkbox, This Transaction Can Be Stopped From Processing Orders That Are On Hold, checked in the Others tab of the transaction details screen. For more information about viewing transaction details, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

You can use the Hold Types branch in the Applications Manager for:

- Creating a Hold Type
- Creating an Order Line Level Hold Type
- Deleting a Hold Type

## 20.1.1 Creating a Hold Type

Hold types can be created at either the order or order line level. Selecting Hold Types from the application rules side panel displays the Order Hold Types screen.

*Figure 20–1 Order Hold Types Screen*

This screen provides a list of previously created holds and their associated level.

#### 20.1.1.1 Creating an Order Level Hold Type

To create an order level hold type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Hold Types. The Hold Types window displays in the work area.
2. Click in the Order Hold Types panel. The Hold Type pop-up window displays.
3. In the Hold Type field, enter the type of the hold.
4. In the Hold Type Description field, enter the description of the hold type.
5. Enter the information in the applicable fields. For field value descriptions, see Table 20–1, Table 20–2 and Table 20–3.
6. Click .

***Table 20–1 Hold Type Screen, Hold Creation tab***

| Field | Description |
|---|---|
| **Hold Created Automatically** | |
| On Draft Order Creation | Check this option to apply this hold type to all orders during draft order creation. |
| On Draft Order Confirmation | Check this option to apply this hold type to all orders during draft order confirmation. |
| On Order Creation | Check this option to apply this hold type to all orders during order creation. |

***Table 20–1 Hold Type Screen, Hold Creation tab***

| Field | Description |
|---|---|
| On Resolution Of The Hold Type | Check this option to apply this hold type during the resolution of another hold type. From the drop-down list, select the hold type that, upon resolution, triggers this hold type.<br><br>**Note**: Selling and Fulfillment Foundation does not check whether or not you are defining a circular hold type definition. For example, if you define hold type B as being applied during the resolution of hold type A, and hold type A as being applied during the resolution of hold type B, you could create an infinite loop that Selling and Fulfillment Foundation does not warn you against. |
| When The Following Modifications Are Performed | Modification types that automatically apply this hold type to an order.<br><br>Click to modify the list. In the subsequent pop-up window:<br>• Use the right arrow to move the available modification types that you wish to associate with this hold type to the subscribed list.<br>• Use the left arrow to unsubscribe the modification types that you wish to disassociate with this hold type and move them back into the available list. |
| For All Orders | Select this radio button if the above conditions should be checked for all orders.<br><br>**Note**: You can only select this option after the created hold has been saved. |
| Only For Orders Satisfying The Following Condition | Select this radio button if the above conditions should only be checked for orders satisfying a certain condition. Click to build or modify the condition that is evaluated. For more information about using the condition builder, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.<br><br>The available attributes for this condition can be extended. For more information about extending condition attributes, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br><br>**Note**: You can only select this option after the created hold has been saved |

***Table 20–1 Hold Type Screen, Hold Creation tab***

| Field | Description |
|---|---|
| **Hold Created Manually** | |
| By Any User | Select this radio button if all user groups can apply this hold to an order. |
| By Users Who Belong To The Following Groups | Select this radio button if only users belonging to certain user groups can apply this hold to an order.<br><br>Click to modify the list of user groups. In the subsequent pop-up window:<br>• Use the right arrow to move the available user groups that you wish to associate with this hold type to the subscribed list.<br>• Use the left arrow to unsubscribe the user groups that you wish to disassociate with this hold type and move them back into the available list. |

***Table 20–2 Hold Type Screen, Hold Resolution tab***

| Field | Description |
|---|---|
| **Hold Resolved Automatically** | |
| The Following Time-Triggered Transaction Will Process Created Holds | From the drop-down list, select the time-triggered transaction that will process the created holds. |
| The Following Time-Triggered Transaction Will Process Rejected Holds | From the drop-down list, select the time-triggered transaction that will process the rejected holds. |
| Can Resolve On Cancel | Select this radio button to automatically remove a hold when an order is cancelled. |
| **Hold Resolved Manually** | |

*Table 20–2 Hold Type Screen, Hold Resolution tab*

| Field | Description |
|---|---|
| Any User Can Process This Hold | Select this radio button if all user groups can process this hold. |
| Users Belonging To The Following User Groups Can Process This Hold | Select this radio button if only users belonging to certain user groups can process this hold.<br><br>Click to modify the list. In the subsequent pop-up window:<br>• Use the right arrow to move the available user groups that you wish to associate with this hold type to the subscribed list.<br>• Use the left arrow to unsubscribe the user groups that you wish to disassociate with this hold type and move them back into the available list. |

*Table 20–3 Hold Type Screen, Hold Effects tab*

| Fields | Description |
|---|---|
| The Following Transactions Will Be Stopped From Processing Orders On This Hold | Transactions that are disallowed when this hold type is applied to an order.<br><br>Click to modify the list. In the subsequent pop-up window:<br>• Use the right arrow to move the available transactions that you wish to associate with this hold type to the subscribed list.<br>• Use the left arrow to unsubscribe the transactions that you wish to disassociate with this hold type and move them back into the available list. |
| The Following Modifications Are Not Allowed For Orders On This Hold | Modification types that are disallowed when this hold type is applied to an order.<br><br>Click to modify the list. In the subsequent pop-up window:<br>• Use the right arrow to move the available modification types that you wish to associate with this hold type to the subscribed list.<br>• Use the left arrow to unsubscribe the modification types that you wish to disassociate with this hold type and move them back into the available list. |

### 20.1.1.2 Creating an Order Line Level Hold Type

To create an order line level hold type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Hold Types. The Hold Types window displays in the work area.
2. Click in the Order Line Hold Types panel. The Hold Type pop-up window displays.
3. In the Hold Type field, enter the type of the hold.
4. In the Hold Type Description field, enter the description of the hold type.
5. Enter the information in the applicable fields. For field value descriptions, see Table 20–4, Table 20–5 and Table 20–6.

6. Click .

***Table 20–4 Hold Type Screen, Hold Creation tab***

| Field | Description |
|---|---|
| **Hold Created Automatically** | |
| On Draft Order Creation With Lines Or Adding Lines To Draft Order | Check this option to apply this hold type to all lines on an order upon entering Draft Order Created status or when a line is added to an order that is already in Draft Order Created status. |
| On Draft Order Confirmation | Check this option to apply this hold type to a line upon confirmation of a draft order. |
| On Order Creation Or Adding Lines To An Order | Check this option to apply this hold type to a line upon creation or addition to an order. |

***Table 20–4 Hold Type Screen, Hold Creation tab***

| Field | Description |
|---|---|
| On Resolution Of The Hold Type | Check this option to apply this hold type during the resolution of another hold type. From the drop-down list, select the hold type that, upon resolution, triggers this hold type.<br><br>**Note**: Selling and Fulfillment Foundation does not check whether or not you are defining a circular hold type definition. For example, if you define hold type B as being applied during the resolution of hold type A, and hold type A as being applied during the resolution of hold type B, you could create an infinite loop that Selling and Fulfillment Foundation does not warn you against. |
| When The Following Modifications Are Performed | Modification types that automatically apply this hold type to an order.<br><br>Click to modify the list. In the subsequent pop-up window:<br>• Use the right arrow to move the available modification types that you wish to associate with this hold type to the subscribed list.<br>• Use the left arrow to unsubscribe the modification types that you wish to disassociate with this hold type and move them back into the available list. |
| For All Order Lines | Select this radio button if the above conditions should be checked for all order lines.<br><br>**Note**: You can only select this option after the created hold has been saved. |
| Only For Order Lines Satisfying The Following Condition | Select this radio button if the above conditions should only be checked for order lines satisfying a certain condition. Click to build or modify the condition that is evaluated. For more information about using the condition builder, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.<br><br>The available attributes for this condition can be extended. For more information about extending condition attributes, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br><br>**Note**: You can only select this option after the created hold has been saved. |

*Table 20–4 Hold Type Screen, Hold Creation tab*

| Field | Description |
|---|---|
| **Hold Created Manually** | |
| By Any User | Select this radio button if all user groups can apply this hold to an order. |
| By Users Who Belong To The Following Groups | Select this radio button if only users belonging to certain user groups may apply this hold to an order.<br><br>Click to modify the list. In the subsequent pop-up window:<br>• Use the right arrow to move the available user groups that you wish to associate with this hold type to the subscribed list.<br>• Use the left arrow to unsubscribe the user groups that you wish to disassociate with this hold type and move them back into the available list. |

***Table 20–5 Hold Type Screen, Hold Resolution tab***

| Field | Description |
|---|---|
| **Hold Resolved Automatically** | |
| The Following Time-Triggered Transaction Will Process Created Holds | From the drop-down list, select the time-triggered transaction that will process the created holds. |
| The Following Time-Triggered Transaction Will Process Rejected Holds | From the drop-down list, select the time-triggered transaction that will process the rejected holds. |
| Can Resolve On Cancel | Select this radio button to automatically remove a hold when an order is cancelled. |
| **Hold Resolved Manually** | |

***Table 20–5 Hold Type Screen, Hold Resolution tab***

| Field | Description |
|---|---|
| Any User Can Process This Hold | Select this radio button if all user groups can process this hold. |
| Users Belonging To The Following Groups Can Process This Hold | Select this radio button if only users belonging to certain user groups can process this hold.<br><br>Click to modify the list. In the subsequent pop-up window:<br>• Use the right arrow to move the available user groups that you wish to associate with this hold type to the subscribed list.<br>• Use the left arrow to unsubscribe the user groups that you wish to disassociate with this hold type and move them back into the available list. |

***Table 20–6 Hold Type Screen, Hold Effects tab***

| Fields | Description |
|---|---|
| The Following Transactions Will Be Stopped From Processing Orders On This Hold | Transactions that are disallowed when this hold type is is applied to an order.<br><br>Click to modify the list. In the subsequent pop-up window:<br>• Use the right arrow to move the available transactions that you wish to associate with this hold type to the subscribed list.<br>• Use the left arrow to unsubscribe the transactions that you wish to disassociate with this hold type and move them back into the available list.<br><br>The third column is used to select the effect level of the hold. This determines at whether the transaction is held at the order or order line level. |
| The Following Modifications Are Not Allowed For Orders On This Hold | Modification types that are disallowed when this hold type is applied to an order.<br><br>Click to modify the list. In the subsequent pop-up window:<br>• Use the right arrow to move the available modification types that you wish to associate with this hold type to the subscribed list.<br>• Use the left arrow to unsubscribe modification types that you wish to disassociate with this hold type and move them back into the available list. |

## 20.1.2 Modifying a Hold Type

To modify a hold type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Hold Types. The Hold Types window displays in the work area.
2. Select the applicable hold type and click . The Hold Type pop-up window displays. Enter information in the applicable fields. For field value descriptions, see Table 20–1, Table 20–2 and Table 20–3 (for Order Level Holds) or Table 20–4, Table 20–5, and Table 20–6 (for Order Line Level Holds).

3. Click .

### 20.1.3 Deleting a Hold Type

To delete a hold type:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Hold Types. The Hold Types window displays in the work area.
2. Select the applicable hold type and click .

## 20.2 Defining Order Tags

Order Tags enable the system to coordinate which order features are available across multiple versions of PCAs when they are installed on Selling and Fulfillment Foundation. This version awareness makes it possible to schedule an order in one version of the Sterling Call Center and Sterling Store, for example, and schedule delivery of that order in another version. If some features are not available across PCA versions, a message can be displayed to the user indicating when this is the case.

To define order tags:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Order Tags. The Order Tags window displays in the work area.

2. Select the applicable order tag and double click to open it or click to create a new order tag. The Order Tag Detail window is displayed.

Table 20–7 contains field definitions.

***Table 20–7 Order Tag Detail window***

| Field | Description |
|---|---|
| Tag ID | Select the Tag ID from the pull-down. (This tag is defined in the Applications Manager Application Platform > Qualified Tag Information, and must be only a tag of type y.compatibility. See the *Selling and Fulfillment Foundation: Application Platform Configuration Guide* for more information.) |
| Description | Enter a description of this tag determination. |

*Table 20–7 Order Tag Detail window*

| Field | Description |
|---|---|
| **Create Order Tags When the Following Criterion Is Met** | |
| For Orders Satisfying The Following Order Condition | If you click this check box, click to open the Condition Detail pop-up window and define the Condition ID, Name, Group, and Value under which the tag will be applied to an order that satisfies these conditions. |
| For Orders Satisfying The Following Order Line Condition | If you click this check box, click to open the Condition Detail pop-up window and define the Condition ID, Name, Group, and Value under which the tag will be applied to an order when an order line satisfies these conditions. |
| When The Following Modifications Are Performed | If you click this check box, click to open the Modification Type List pop-up window and enable available Modification Types that define when this condition will be applied to an order. |

Following is an example of the Condition Detail pop-up window, followed by Table 20–8, which describes the field definitions.

***Table 20–8 Condition Detail pop-up window***

| | |
|---|---|
| Condition Name | Enter the name of the condition for this order tag to be applied to the order. |
| Condition ID | Enter the ID for this condition. |
| Condition Value | This field contains information you enter in the General Condition Builder. Click to display the General Condition Builder.<br>The *Selling and Fulfillment Foundation: Application Platform Configuration Guide* contains information about Condition Builder attributes, and the *Catalog Management: Configuration Guide* contains information about using the Condition Builder. |

Following is an example of the Modification Type List, followed by Table 20–9, which describes its fields.

***Table 20–9 Modifications Type List window***

| Field | Description |
|---|---|
| Available | A list of the available Modification Types and Levels.<br>To subscribe a Modification Type, select a Modification Type that has a Level of Order or Order Line. Click ⇨. |
| Subscribed | A list of the Modification Types and Levels to which the Order Tag is subscribed.<br>To remove a Modification Type from the subscribed list, select the applicable Modification Type and choose ⇦. |

### 20.2.1 Modifying an Order Tag

To modify an Order Tag:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Order Tags. The Order Tags window displays in the work area.
2. Select the applicable Order Tag and click . The Order Tag Detail pop-up window displays. Enter information in the applicable fields. For field value descriptions, see Table 20–7.
3. Click .

### 20.2.2 Deleting an Order Tag

To delete an Order Tag:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Order Tags. The Order Tags window displays in the work area.
2. Select the applicable Order Tag and click .

## 20.3 Defining Fulfillment Rules

You can define generic rules that Selling and Fulfillment Foundation uses at order fulfillment time. These can affect order controls and reservations.

To define fulfillment rules:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Fulfillment Rules. The Fulfillment Rules window displays in the work area.
2. Enter information in the applicable fields. Refer to Table 20–10 for field value descriptions.
3. Click .

***Table 20–10 Order Fulfillment window***

| Field | Description |
|---|---|
| **Order Controls** | |
| A line can be fulfilled from a single node only | Check this box if you want any quantity of an order line to be shipped from the same ship node. Checking this enables the three checkboxes below to be checked. |
| **For lines with a firm pre-defined ship node:** | |
| When the line is partially backordered or unscheduled, split it into two separate lines so that a different ship node can be selected for the new line | Check this box if you want Selling and Fulfillment Foundation to automatically split partially backordered or unscheduled lines into two separate lines. This allows the user to manually assign a new ship node for the backordered portion of the line, so that the entire original order line may be shipped. |

*Table 20–10 Order Fulfillment window*

| Field | Description |
|---|---|
| **For lines without a firm pre-defined ship node:** | |
| When the line is partially backordered or unscheduled, split it into two separate lines so that the sourcing logic can determine an alternate ship node for the new line | Check this box if you want Selling and Fulfillment Foundation to automatically split partially backordered or unscheduled lines into two separate lines. This allows the backordered portion of the line to be scheduled and potentially find a new ship node so that the entire original order line may be shipped. |
| When a complete line is backordered, backorder against the highest priority ship node regardless of the ship node present on the line. | Check this box if you want Selling and Fulfillment Foundation to automatically select the ship node that is highest in the sourcing priority, even if that ship node is different from the ship node specified on the order line in the event of a backorder of the complete order line. |
| When reserving or scheduling a product line, use node from the work order | Check this box if you want Selling and Fulfillment Foundation to use the node specified on the work order when reserving or scheduling a product line, if no ship node has been specified on the order line, or if the node is non-firm. If a ship node is specified on the order line, Selling and Fulfillment Foundation uses that node over the node specified on the work order. |
| Allow scheduling of a product line that is part of a work order, before appointment is taken. | Check this box if you want Selling and Fulfillment Foundation to allow order lines with delivery method set to Delivery to be scheduled when an appointment has not yet been taken on the associated service work order.<br>**Note**: If scheduling and releasing the order line at the same time, the order line is not scheduled, even with this flag enabled. |
| **Reservations** | |
| Attempt to reserve the complete quantity of an order line. | Check this box if you want Selling and Fulfillment Foundation to try to promise the complete quantity of an order line against reserved inventory.<br>For example, if an order line is placed for quantity five, and reserved inventory of quantity three is available, then Selling and Fulfillment Foundation reserves quantity three of that order line. |

*Table 20–10 Order Fulfillment window*

| Field | Description |
|---|---|
| Reservation is mandatory for the complete quantity of an order line. | Check this box if you want Selling and Fulfillment Foundation to always try to use reserved inventory for the complete quantity of an order line. If it is not possible, an error is thrown. |
| Inventory reservations created for a specific date are valid for all orders with the same or future ship date. | Check this box if you want to allow orders to be promised against inventory that is reserved for a date anterior to the requested ship date.<br>For example, if an order is placed with a requested ship date that is three days in the future, and if reserved inventory is available two days in the future, Selling and Fulfillment Foundation enables the order to use that inventory if this is checked.<br>If this not checked, only inventory reserved for the same day as the requested ship date is allowed to be used for order promising.<br>**Note:** This field is primarily for backward compatibility issues. |
| Suppress the validation of reservations on order line modifications. | Check this box if you do not want Selling and Fulfillment Foundation to check for reservations for existing reserved quantity when a modification is made to a previously reserved order line.<br>For example, if an order line that has been reserved at Node 1 is modified to be sourced from Node 2, Selling and Fulfillment Foundation does not check Node 2's inventory to ensure it can be reserved there.<br>**Note:** This field is primarily for backward compatibility issues. |

## 20.4 Defining Approval Plans for Quotes

One or more approvals are often required for quotes, depending on the approval rules that are applicable for the quote. You can define an approval plan to determine who must approve a quote, and the sequence in which the approvals must occur.

To define an approval plan for quotes:

1. From the tree in the application rules side panel, select Document Specific > Quote > Fulfillment > Approval Plans. The Approval Plan Details window is displayed in the work area.

2. Enter information in the applicable fields. For field value descriptions, refer to Table 20–11.

Approval Plan Details : Quote ( DEFAULT )

Approval Plan configuration is used to evaluate who should approve the quote based on the approval hierarchy determined by the Approval Sequence. The Team Code indicates which team should provide the approval. The User Group indicates which role in the team a user should play to be able to approve. The Predecessor Sequence indicates which group should approve prior to the current approval. The flag Is Approval Mandatory is used to mandate a given approval. Even if a predecessor is able to approve, this flag will make the given approval mandatory. The Predecessor Sequence may be a comma separated list of Approval Sequences.

Approval Plan List

| | Approval Sequence | Approval Name | Team Code | User Group | Predecessor Sequence | Is Approval Mandatory |
|---|---|---|---|---|---|---|
| | 1 | QA Manager Approval | QA | Managers | | ☐ |
| | 2 | QA Director Approval | QA | Directors | | ☐ |
| | 3 | Dev Manager Approval | DEVELOPMENT | Managers | | ☐ |
| | 4 | Dev Directory Approval | DEVELOPMENT | Directors | 2 | ☐ |
| | 5 | Legal Approval | LEGAL | Directors | | ☐ |
| | 6 | Finance Approval | FINANCE | Directors | | ☐ |
| | 7 | CEO Approval | CEO | CEO | 2,4,5,6 | ☑ |
| * | | | | | | ☐ |

Results 7 of 7

***Table 20–11 Approval Plan Details Window***

| Field | Description |
|---|---|
| Approval Sequence | Indicates the sequence of the approvals. |
| Approval Name | Enter the name of an approval. |
| Team Code | From the drop-down list, select a team to approve the quotes. |
| User Group | From the drop-down list, select a user group (role) within the team to approve the quotes. |
| Predecessor Sequence | Enter the sequence number, which is associated with an approval sequence, of predecessor approvers.<br>You can specify multiple predecessors by using commas, for example, 1,2,3.<br>**Note:** Approvers do not necessarily need to approve in this sequence. |
| Is Approval Mandatory | Check this box if the specified approver must approve the quote regardless of whether approval rules have been violated or not, and regardless of the approval hierarchy. |

3. Click .

## 20.5 Defining Process Type Details

You can define the parameters and templates that distinguish a process type.

For more information about defining process type details, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

## 20.6 Process Type Pipeline Configuration

A **process type pipeline** is a series of transactions and statuses that guide document types, such as a Sales Order, through a predefined process. A pipeline consists of the different statuses a document goes through during fulfillment, negotiation, shipment, or receipt. You can also set up transactions consisting of events, actions, and conditions, as they pertain to the pipeline you are configuring.

### Repositories

A repository is a logical collection of entities that define the business process workflow.

The following entities are included in a repository:

- Pipelines
- Transactions
- Statuses
- Conditions
- Actions
- Services

Selling and Fulfillment Foundation provides a base repository for each of the system defined process types. Some of the entities within a repository are copied when creating a new document type. For more information about creating a new document type, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

The process of order fulfillment is modeled through a pipeline. This represents the process configuration that is unique to an organization. An

organization may also specify unique processes for each participating Enterprise.

## 20.6.1 Defining Pipeline Determination

**Pipeline determination** is used to set up conditions that affect which pipeline is used during the start of the business process workflow. For example, an organization deals with sales orders that sometimes contain hazardous materials. They have two separate pipelines, one in which orders with order lines without any hazardous materials go through and one in which orders with order lines containing hazardous materials must go through for inspection before continuing through the order process. The organization uses pipeline determination to set up a condition that determines whether or not order lines contain hazardous materials and sends the order line down the correct pipeline.

When you expand the Pipeline Determination branch, the components displayed depends on what role you are logged in as. If you are logged in as a Hub role, the Hub Rule displays. If you are logged in as an Enterprise role, both the Hub Rule and My Rule components display. Double-click on the applicable node to display the pipeline determination rules.

**Note:** If you are logged in as an Enterprise role, the Hub Rule screen is grayed out and cannot be modified.

Drag conditions and pipelines into the work area to construct pipeline determination rules. A single pipeline or condition must be the root. Conditions cannot link back to an earlier component in the chain and a pipeline cannot be linked to twice.

**Note:** When configuring pipeline determination for an order document type pipeline, please note that pipeline determination is only considered when adding a line or creating an order. When changes are made to draft orders pipeline determination does not occur.

#### 20.6.1.1 Condition Variables for Pipeline Determination

For a list of the condition variables that can be used at the order header and order line level for pipeline determination, refer to Appendix C, "Condition Builder Attributes".

### 20.6.2 Pipelines

For more information about configuring pipelines, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To view the order fulfillment pipeline details:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Fulfillment Process Model. The Order Fulfillment window displays.

2. In the Order Fulfillment window, choose Order Fulfillment Repository > Pipelines > Sales Order Fulfillment.
3. The Pipeline Detail: Sales Order Fulfillment (Order Fulfillment) window displays.

For more information about creating and modifying a pipeline, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

## 20.6.3 Transactions

Every process type has a set of base transactions defined for it. A transaction is a logical unit of work that is necessary for performing activity within Selling and Fulfillment Foundation. Base transactions are predefined transactions that contain information about how the transaction behaves, such as how many copies of a transaction can be kept in a process type and whether or not it can have configurable base pick and drop statuses. Base transactions can be used to create new transactions. These transactions can be changed within the limits defined in the base transaction.

For more information about Transactions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To view the transaction details for an order fulfillment pipeline:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Fulfillment Process Model. The Order Fulfillment window displays.
2. In the Order Fulfillment window, choose .
3. The Transactions tab window displays.

For more information about creating and modifying transactions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

*Table 20–12 Order Fulfillment Pipeline - Transactions Tab Window*

| Field | Description |
|---|---|
| Chained Order Create | This transaction represents a point in the pipeline where a chained order is created. |
| Change Order | This transaction represents any modifications that may be made to an order. |
| Change Order Release | This transaction represents any modifications that may be made to an order release. |
| Change Schedule | This transaction represents any modifications that may be made to the scheduling determinations for an order or order line. |
| Change Status | This transaction represents any modifications that may be made involving an order or order line's status. |
| Close Order | This transaction represents an order being closed and archived in the system. |
| Confirm Draft Order | This transaction represents a draft order is manually confirmed and considered an actual order in the system. |
| Consolidate To Shipment | This transaction the process of finding a shipment into which a given order release can be included. |
| Create Draft Order | This transaction represents the creation of a draft order in the system. |
| Create Order | This transaction represents the creation of an order in the system. |
| Enhanced Order Monitor | This transaction represents the advanced set of parameters used to monitor orders in the system. |
| Import Order | This transaction represents the process of importing an order that has already been processed to some extent by an external system. |
| Include In Return | This transaction represents the process of creating a return. |
| Include Order In Shipment | This transaction represents the process of creating a shipment. |
| Order Monitor | This transaction represents the basic set of parameters used to monitor orders in the system. |

***Table 20–12 Order Fulfillment Pipeline - Transactions Tab Window***

| Field | Description |
|---|---|
| Payment Collection | This transaction represents the process of requesting credit validation for orders that are pending authorization or charging. |
| Payment Execution | This transaction represents the processing of all requests that are pending authorization and charging. |
| Purge Order | This transaction represents an order that can be purged moved from the tables into history tables. |
| Purge Order History | This transaction represents the process of purging orders from the history tables and removing them from the system. |
| Purge Status Audit | This transaction represents the process of removing order status audit data from the system. |
| Receive Negotiation | This transaction represents receiving negotiation requests from the Buyer on the order. After a negotiation is finished, this transaction applies the results of the negotiation to the order. |
| Receive Return | This listener transaction monitors the reverse logistics pipeline and indicates when the return for an order has been received at the receiving node. |
| Release Order | This transaction represents the process of releasing orders to specific ship nodes, making sure that the scheduled ship nodes have enough inventory to process the order. |
| Remove From Return | This transaction represents the process of removing an order from an existing return. |
| Remove Order From Shipment | This transaction represents the process of removing an order from an existing shipment. This transaction internally invokes the confirmShipment API. See the *Selling and Fulfillment Foundation: Javadocs* for more information. |
| Schedule Order | This transaction represents the process of scheduling orders to specific ship nodes making sure that the scheduled ship nodes have enough inventory to process the order. |
| Send Invoice | This transaction represents the process of publishing invoice data that can be directed to an external accounts receivable systems. |

*Table 20–12 Order Fulfillment Pipeline - Transactions Tab Window*

| Field | Description |
|---|---|
| Send Release | This transaction represents the process of dispatching releases to ship nodes. |
| Ship Order | This transaction represents the process of an order being shipped when no shipment data has been created. This transaction internally invokes the confirmShipment API. See the *Selling and Fulfillment Foundation: Javadocs* for more information. |
| Ship Shipment | This transaction represents the process of an order being shipped after shipment data is created. This transaction internally invokes the confirmShipment API. See the *Selling and Fulfillment Foundation: Javadocs* for more information. |
| Start Negotiation - Order | This transaction represents the process of initiating the negotiation process with the Buyer on an order. |
| Synchronize Task Queue | This transaction represents the process of synchronizing the order fulfillment task queue. |
| Unschedule Order | This transaction represents the process of unscheduling an order that has already been scheduled to a ship node. |
| Work Order to Order Listener | This listener transaction notifies the pipeline of work order completion. |

## 20.6.4 Statuses

**Statuses** are the actual states that a document moves through in the pipeline. A transaction can contain two types of statuses, a drop status and a pickup status. A document is moved into a **drop status** when the events and conditions of a transaction have been completed. A **pickup status** takes the document from the previous drop status and moves it through the next transaction. Created and Scheduled are examples of statuses.

For more information about Statuses, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To view the status details of an order fulfillment pipeline:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Fulfillment Process Model. The Order Fulfillment window displays.
2. In the Order Fulfillment window, choose .
3. The Statuses tab window displays.

For more information about creating and modifying statuses, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

*Table 20–13 Order Fulfillment Pipeline - Statuses Tab Window*

| Field | Description |
|---|---|
| Draft Order Created | This indicates that a draft order has been created. |
| Created | This indicates that an order has been created. |
| Reserved | This indicates the order has been created, but it is not ready to schedule yet. |
| Being Negotiated | This indicates that the order is undergoing the negotiation process with the Buyer on the order. |
| Accepted | This indicates that an order has been manually accepted. |
| Backordered | This indicates that an order is backordered until sufficient inventory is available. |
| Unscheduled | This indicates that the order has been removed from Scheduled status and any inventory that has been reserved for the order at the scheduled node(s) is canceled. |
| Backordered From Node | This indicates that the order has been created and released to the node, but the node does not have enough inventory to fulfill the order. |
| Scheduled | This indicates that the applicable node(s) have the inventory to fulfill the order and can be scheduled for release. |
| Awaiting Chained Order Creation | This indicates that the wave has been printed for picking. |
| Chained Order Created | This indicates that a chained order must be created and sent to the applicable node. |
| Procurement PO Created | This indicates that a procurement purchase order has been created. |
| Procurement PO Shipped | This indicates that a procurement purchase order has been shipped. |
| Procurement TO Created | This indicates that a procurement transfer order has been created. |
| Procurement TO Shipped | This indicates that a procurement transfer order has been shipped. |
| Work Order Created | This indicates that a work order has been created. |

*Table 20–13 Order Fulfillment Pipeline - Statuses Tab Window*

| Field | Description |
|---|---|
| Work Order Completed | This indicates that a work order has been completed. |
| Released | This indicates that there is enough inventory to schedule to the order for fulfillment. The order is released to the Application Consoles, the Sterling Warehouse Management System, or another third-party warehouse management system. |
| Awaiting Shipment Consolidation | This indicates that the order is to be grouped and consolidated with other shipments before it continues through the pipeline. |
| Awaiting WMS Interface | This indicates that the order must interface with the Sterling Warehouse Management System before continuing in the pipeline. |
| Sent To Node | This indicates that the order is sent in the form of an order release. |
| Included In Shipment | This indicates that the order is included in a shipment. |
| Shipped | This indicates that the order has been shipped |
| Return Created | This indicates that the Buyer is returning one or more items included in the order. |
| Return Received | This indicates that returned items have been received at the return node. |
| Held | This indicates that the order is being held and no modifications can be made until it is released from the hold. |
| Shipment Delayed | This indicates that all or part of the order shipment has been delayed. |
| Cancelled | This indicates that the order has been canceled. |
| Shorted | This indicates that the order contains less quantity than requested. |

## 20.6.5 Conditions

A **condition** matches document type attributes against decision points and routes the documents to different paths based on the specified attribute and value combinations. The document type attributes against which conditions can be created are predefined in Selling and Fulfillment Foundation. You can use these attributes in any combination or you can

create conditions that run the appropriate application logic for specific circumstances.

For more information about conditions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To view the condition details of an order fulfillment pipeline:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Fulfillment Process Model. The Order Fulfillment window displays.
2. In the Order Fulfillment window, choose .
3. The Conditions tab window displays.

For more information about creating and modifying conditions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

*Table 20–14 Order Fulfillment Pipeline - Conditions Tab Window*

| Field | Description |
|---|---|
| Conditions | Displays conditions that are specific to the order fulfillment pipeline, if any. |

### 20.6.6 Actions

An **action** is a process or program that is triggered by an event. These processes and programs send user alert notifications and automatically resolve issues.

For example, when an order is released (the event), you can set an action to send the customer an e-mail.

For more information about Actions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To view the action details of an order fulfillment pipeline:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Fulfillment Process Model. The Order Fulfillment window displays.
2. In the Order Fulfillment window, choose .
3. The Actions tab window displays.

For more information about creating and modifying actions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

## 20.7 Defining Transaction Rules

You can define additional rules for shipment advice, shipment confirmation, order entry, order monitoring, and negotiation monitoring.

**Note:** To define additional transaction rules for quotes, refer to Section 20.7.1, "Defining Transaction Rules for Quotes".

To define additional transaction rules:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Transaction Specific Rules. The Transaction Rules window displays.
2. Enter information in the applicable fields. Refer to Table 20–15 for field value descriptions.
3. Choose .

*Table 20–15 Transactions Rules Window*

| Field | Description |
|---|---|
| **Ship Advice** | |
| Include Price Information in Instruction | When selected, the system sends down price information on the order as a part of the ship advice instructions.<br>This is a DCS-specific parameter. Key price-related elements from Selling and Fulfillment Foundation is sent to DCS as instructions of type SHC (shipping and handling charges at order header level), PRM (discount amount at the order header level), and STX (tax at the order header level). |
| **Ship Confirm** | |
| Cancel Order on Inventory Shortage | When selected, items are canceled or backordered in case of inventory shortage. |
| **Order Monitor** | |
| Order Monitor Relog Interval | Enter the number of hours after which the order monitor raises an action if a document type remains in the same status in a pipeline.<br>The Inventory Monitor and Order Monitor run at pre-defined (scheduled) intervals. Once an alert is raised, the same alert should not be raised over and over again at every run. Relog intervals control how soon after the previous alert the next alert should be triggered.<br>**Important:** This field has no impact on the Enhanced Order Monitor. |
| **Negotiation Monitor** | |
| Negotiation Monitor Relog Interval | Enter the number of hours after which the Negotiation Monitor raises an action if a document type remains in the same status in a negotiation pipeline. |
| **Post Voided Sale on Order** | |
| Mark Post Voided Sale for Auto-Cancellation After | Enter the number of hours based on which the auto-cancel date is set on the order. |

*Table 20–15 Transactions Rules Window*

| Field | Description |
|---|---|
| **Reship Order** | |
| Minimum Reship Window | Enter the minimum number of days allowed to pass after an order line has been shipped before an order line may need to be reshipped. |
| **Action to take on parent line when chained line is canceled** | |
| Unschedule | When selected the unschedule action is performed on the parent order line when a chained order line is canceled. An unscheduled parent line is synonymous with a backordered line. For more information about chained orders, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*. |
| Cancel | When selected the parent line is canceled when a chained order line is canceled. For more information about chained orders, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*. |
| **Cancellation of Order Lines with Work Orders** | |
| Allow Cancellation Even If Work Order Cannot Be Cancelled | An order may have generated a work order to customize the item for the customer. In some scenarios, the work order cannot be cancelled. For example, the work order cannot be cancelled because the work order has already been completed, or because the work order is performed by an organization that does not accept work order cancellations.<br><br>By default, the order associated with the work order cannot be cancelled. Select ‘Allow Cancellation Even If Work Order Cannot Be Cancelled’ to permit the parent orders to be cancelled if the work order cannot be cancelled. |

*Table 20–15 Transactions Rules Window*

| Field | Description |
|---|---|
| **Synchronize Dates** | |
| Synchronize Dates Between Master Order Dates And Dates On Order Line And Schedules | Check this box to synchronize the requested dates and the expected ship dates for the Order, Order Header, Order Line, and Order Line Schedules.<br>The requested dates synchronize with the requested ship, requested deliver, and cancel dates on the order line or header.<br>The expected dates synchronize with the order schedules.<br>**Note:** If this rule is not chosen, the synchronization between dates is not possible. |
| **Expected Dates On Order** | |
| Do Not Recompute Expected Dates When Requested Dates On The Order Are Changed | Check this box when you do not want the requested dates on the order line to be synchronized with the expected dates on the order line schedule.<br>**Note:** The dates are synchronized only during the line creation.<br>**Note:** Scheduling should not be used on orders which have expected and requested dates that are not synchronized. |
| **Pickup Order Lines** | |
| Compute Expected Dates When Requested Dates On The Pickup Order Lines Are Changed | Check this box to recompute the expected ship date of an item when a customer chooses to pick up either a portion of an order or the complete order at a later date.<br>**Note:** This flag is available for outbound orders only. |
| **Confirm Draft Order** | |
| Update Order Date On Confirm Draft Order | Check this box to set the order date to the date when the order is confirmed and not the date when the order is created. |
| **Action To Take When Unscheduling Last Product Line** | |
| Keep Association To Delivery Service Line | When selected, if the last product line on a work order is cancelled, the association with the delivery line is kept. |

*Table 20–15 Transactions Rules Window*

| Field | Description |
|---|---|
| Remove Association To Delivery Service Line | When selected, if the last product line on a work order is cancelled, the association with the delivery line is removed. |
| **Order Approval** | |
| Hold Type To Be Applied When Order Needs Approval | Select the hold type you want to be applied when an order requires approval.<br>The hold is triggered internally by the system, and therefore, should not be set to automatically apply in the hold configuration.<br>**Note:** This functionality differs from the Order Approval functionality for Quotes. |
| Automatically Resolve Order Approval Hold On Order Change | Check this box if you want order approval holds to be resolved automatically when an order is changed and the conditions necessary to require approval are no longer met. |
| **Customer Contact Status** | |
| Hold Type To Be Applied To An Order When Customer Contact Is On Hold | Select the hold type you want to be applied on an order when a customer contact is on hold. |
| **Pending Order Changes** | |
| Pending Order Changes Will Expire In | Enter the number of hours after which the pending changes on the order will expire. |
| Hold To Be Applied When Order Has Pending Changes | Select the hold type you want to be applied on an order that has pending changes. |

## 20.7.1 Defining Transaction Rules for Quotes

You can define additional rules for quotes, as follows:

1. From the tree in the application rules side panel, choose Document Specific > Quote > Fulfillment > Transaction Specific Rules. The Transaction Specific Rules window displays.
2. Enter information in the applicable fields. Refer to Table 20–16 for field value descriptions.

3. Choose .

***Table 20–16 Transaction Rules Window for Quotes***

| Field | Description |
|---|---|
| **Order Monitor** | |
| Order Monitor Relog Interval | Enter the number of hours after which the order monitor raises an action if a quote remains in the same status in the pipeline.<br>Once an alert is raised, the same alert should not be raised over and over again at every run. Relog intervals control how soon after the previous alert the next alert should be triggered.<br>**Important:** This field has no impact on the Enhanced Quote Monitor. |
| **Expected Dates On Order** | |
| Do Not Recompute Expected Dates When Requested Dates On The Order Are Changed | Check this box when you do not want the requested dates on the order line to be synchronized with the expected dates on the order line schedule.<br>**Note:** The dates are synchronized only during the line creation. |
| **Order Approval** | |
| Hold Type To Be Applied When Order Needs Approval | Select the hold type you want to be applied when an order requires approval.<br>**Note:** The hold is triggered internally by the system, and therefore, should not be set to automatically apply in the hold configuration. |

# 20.8 Defining Status Inventory Types

You can define how and when inventory is updated for Sellers and Buyers tracking inventory, on a status-by-status basis. The Status Inventory Types table is used to associate statuses with specific supply and demand types according to organization. When an order moves through the statuses of a given fulfillment pipeline the values corresponding to the Buyer supply type and Seller demand type associated with the original status are decreased and the values for the status the order is moving into are increased.

## Example

Assume you have the following records in the Status Inventory Type table:

***Table 20–17 Sample Status Inventory Type Records***

| Status | Buyer Supply Type | Seller Demand Type | Seller Supply Type | Increment Seller Supply |
|---|---|---|---|---|
| 1100 | Purchase Order Placed | Open Order | Onhand | N |
| 3200 | Purchase Order Released | Released | Onhand | N |
| 3700 | Intransit | | | Y |

When an order with a line item quantity of 10 is created in Created (1100) status, the Purchase Order Placed supply record is updated with a quantity of 10. A Open Order demand type with a quantity of 10 is created for the Seller.

In this example, if a quantity of 3 is moved into Released (3200) status, the Purchase Order Placed supply record is decreased by 3 and a new supply record with a quantity of 3 is created for the Purchase Order Released supply type. The Open Order demand record is also decreased by 3 and a new demand record is with a quantity of 3 is created for the Released demand type.

When the order moves from Released (3200) status to Shipped (3700) status, the Buyer's supply is decreased for the Purchase Order Released supply type and increased for Intransit. The Seller's demand is decreased

for the Released demand type. However, the demand type is not increased for a new type, because the Seller Demand Type associated with the Shipped (3700) status is blank.

In the above configuration, the Increment Seller Supply flag is set to 'Y' and the Seller's supply type for the Shipped (3700) status is Onhand. The Increment Seller Supply flag indicates that the Seller's supply must be adjusted when moving any quantity into the Shipped (3700) status.

The value in the Seller Supply Type column indicates the supply type that should be updated, in this example, Onhand. Since the record for the Released (3200) status has the Onhand Seller supply type associated with it and the Shipped (3700) status record has a blank Seller supply type associated with it, the Onhand Seller supply type decreases when moving from Released (3200) status to Shipped (3700) status. The Seller supply type is not increased with this status move because the value in the Seller Supply Type column for the Shipped (3700) status is blank.

To view a process type's status inventory types, from the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Status Inventory Types. The Status Inventory window displays. Refer to Table 20–18 for assistance.

Status Inventory Types : Sales Order ( DEFAULT )

Orders Without Chaining | Orders With Chained Children | Procurement Orders

Orders Without Chaining

| Status | Buyer Supply Type | Seller Supply Type | Update Seller Supply | Seller Demand Type |
|---|---|---|---|---|
| Draft Order Reserved | Purchase Order Placed | Onhand | N | Reserved Order |
| Created | Purchase Order Placed | Onhand | N | Open Order |
| Reserved | Purchase Order Placed | Onhand | N | Reserved Order |
| Being Negotiated | Purchase Order Placed | Onhand | N | Open Order |
| Accepted | Purchase Order Placed | Onhand | N | Open Order |
| Backordered | Purchase Order Backorder | Onhand | N | Backorder |
| Unscheduled | Purchase Order Backorder | Onhand | N | Backorder |
| Scheduled | Purchase Order Scheduled | Onhand | N | Scheduled |
| Awaiting Chained Order Cre... | Purchase Order Released | Onhand | N | Allocated |
| Work Order Created | Purchase Order Scheduled | Onhand | N | Scheduled |
| Released | Purchase Order Released | Onhand | N | Allocated |
| Sent To Node | Purchase Order Released | Onhand | N | Allocated |
| Included In Shipment | Purchase Order Released | Onhand | N | Allocated |
| Shipped | In Transit | | Y | |
| Cancelled | | Onhand | N | |

*Table 20–18 Status Inventory Types Window*

| Field | Description |
|---|---|
| Orders Without Chaining/Orders With Chained Children/Procurement Orders | Select the Orders Without Chaining tab to view the status inventory types for orders that flow through the process type pipeline without having any associated chained orders.<br>Select the Orders With Chained Children tab to view the status inventory types of orders having associated drop-ship chained orders.<br>Select the Procurement Orders tab to view the status inventory types of procurement orders. |
| Status | The order document's status. |
| Buyer Supply Type | The Buyer's supply type associated with the order document's status. |
| Seller Supply Type | The Seller's supply type associated with the order document's status. |
| Update Seller Supply | Indicates if inventory updates are made when an order document moves into the associated status. |
| Seller Demand Type | The Seller's demand type associated with the order document's status. |

You can use the Status Inventory Types branch for:

- Creating a Status Inventory Type
- Modifying a Status Inventory Type
- Deleting a Status Inventory Type

## 20.8.1 Creating a Status Inventory Type

To to create a status inventory type:

1. In the Status Inventory Types window, choose . The Status Inventory Type Details window displays.
2. Enter information in the applicable fields. Refer to Table 20–19 for field value descriptions.
3. Choose .

***Table 20–19 Status Inventory Type Details Window***

| Field | Description |
|---|---|
| Status | Select the order document status that you want to associate inventory types with. |
| Buyer Supply Type | Select the Buyer supply type that you want to associate with the order document status. |
| Seller Supply Type | Select the Seller supply type that you want to associate with the order document status. |
| Update Seller Supply | Select this field if you want inventory updates to be performed on the associated inventory types when the order document enters this status.<br>**Note:** If you are integrating with Sterling WMS, this field must be selected and you must specify the Seller Supply Type. |
| Seller Demand Type | Select the Seller demand type that you want to associate with the order document status. |

### 20.8.2 Modifying a Status Inventory Type

To modify a status inventory type:

1. In the Status Inventory Types window, locate the applicable status inventory type and choose . The Status Inventory Type Details window displays.
2. Enter information in the applicable fields. Refer to Table 20–19 for field value descriptions.
3. Choose .

### 20.8.3 Deleting a Status Inventory Type

To delete a status inventory type, locate the applicable status inventory type in the Status Inventory Types window and choose .

**Note:** Default status inventory types which are originally shipped with Selling and Fulfillment Foundation cannot be deleted.

## 20.9 Defining Quote Rules

You can define additional rules that are specific to the Quote document type.

To define additional quote rules:

1. From the tree in the application rules side panel, choose Document Specific > Quote > Fulfillment > Quote Rules. The Quote Rules window displays.
2. Enter information in the applicable fields. Refer to Table 20–20 for field value descriptions.
3. Choose .

***Table 20–20 Quote Rules Window***

| Field | Description |
|---|---|
| **Expiration Policy Before Presenting Quote To Buyer** | |
| Recalculate Expiration Date | Select this check box if you want to recalculate the expiration date before presenting a quote to a buyer. |
| Default Expiration Period (Number Of Days) | By default, the expiration period is 30 days. However, you can change the expiration period, as required. The quote will expire after the specified number of days. |
| **Recommended Items** | |
| Quote Line Type To Use For Recommended Items | Select the quote line type you want to use for recommended items from the drop-down list. |

# 20.10 Defining Monitoring Components

You can define the components used to measure and report unexpected conditions and delays in the order document's lifecycle. For more information about using these components to configure monitoring rules, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To define a process type's monitoring components, from the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Order Monitoring. The Monitoring window displays.

You can use the Monitoring window for:

- Defining Date Types

- Defining Milestones

## 20.10.1 Defining Date Types

You can define custom date types. These dates automatically appear in the configuration screen and the Order/Shipment Dates window in the Console.

You can use the Date Types tab for:

- Creating a Date Type
- Modifying a Date Type
- Deleting a Date Type

### 20.10.1.1 Creating a Date Type

To create a date type:

1. In the Monitoring window, choose the Date Types tab.
2. From the Date Types list, choose . The Date Type Details window displays.
3. Enter information in the applicable fields. Refer to Table 20–21 for field value descriptions.
4. Choose .

***Figure 20–2 Date Type Details***

*Table 20–21 Date Type Details Window*

| Field | Description |
|---|---|
| Date Type | Enter the name of the date type. |
| Description | Enter a brief description of the date type. |
| Requested | Check this box to indicate if the date type represents a date requested by a Buyer, user, and so forth. |
| Expected | Check this box to indicate if the date type represents the date that the system expects or has calculated something to occur. |
| Actual | Check this box to indicate if the date type represents the actual date. |
| Committed | Check this box to indicate if the date type represents a committed date. |

### 20.10.1.2 Modifying a Date Type

To modify a date type:

1. In the Monitoring window, choose the Date Types tab.
2. From the Date Types list, locate the applicable date type and choose . The Date Type Details window displays.
3. Enter information in the applicable fields. Refer to Table 20–21 for field value descriptions.
4. Choose .

### 20.10.1.3 Deleting a Date Type

To delete a date type:

**Note:** The following system dates cannot be deleted:

- Delivery Date
- Order Date
- Ship Date
- Next Iteration Date

1. In the Monitoring window, choose the Date Types tab.

2. From the Date Types list, locate the applicable date type and choose ✕ .

## 20.10.2 Defining Milestones

You can configure applicable statuses in a process type to be milestones. A milestone is a type of date that Selling and Fulfillment Foundation automatically determines when an order moves from one status to another. A milestone represents a significant point in the processing lifecycle that can be used as a criterion for monitoring. Milestones can be defined at the order, order line, order release, and order release line levels.

> **Note:** A milestone can be reached whenever there is a change in an order line. Selling and Fulfillment Foundation marks a milestone as reached if an order line reaches a status marked as a milestone. However, there may be times that only part of an order line reaches a particular status defined as milestone.

You can use the Milestones tab for:

- Creating a Milestone
- Modifying a Milestone
- Deleting a Milestone

### 20.10.2.1 Creating a Milestone

To create a milestone:

1. In the Monitoring window, choose the Milestones tab.
2. From the Milestones list, choose . The Milestone Details window displays.
3. Enter information in the applicable fields. Refer to Table 20–22 for field value descriptions.
4. Choose .

***Table 20–22 Milestone Details***

| Field | Description |
|---|---|
| Date Type | Enter the name of the milestone being created.<br>**Note:** You cannot use date types you have created on the date type tab. You must create a unique name for the milestone. |
| Description | Enter a brief description of the milestone. |
| Requested | Select this field to indicate if the milestone represents a date requested by a Buyer, user, etc. |
| Expected | Select this field to indicate if the milestone represents a date the system expects or has calculated something to occur. |
| Actual | This field is not applicable for milestones. |
| Committed | Select this field to indicate if there is a committed date available for this date type. |

#### 20.10.2.1.1 Creating a Status Milestone

To create a Status Milestone:

1. From the Milestone Details window, choose the Milestone Statuses tab.
2. From the Status Milestones list, choose . The Status Milestone Details window displays.
3. Enter information in the applicable fields. Refer to Table 20–23 for field value descriptions.
4. Choose .

***Table 20–23 Status Milestone Details***

| Field | Description |
|---|---|
| Date Type | The date type if any associated with the milestone. |
| Status | Select the status you want use to indicate the milestone has been reached. |

*Table 20–23 Status Milestone Details*

| Field | Description |
|---|---|
| Milestone Level | Select Order to indicate this status must be reached at the order header level.<br>Select Order Line to indicate that this status must be reached at the order line level.<br>Select Order Release to indicate that this status must be reached at the order release level. |
| Quantity Type | Select Initial to indicate that the milestone is met when any quantity at the above selected level moves into the status.<br>Select Complete to indicate that the milestone is met when all quantity at the above selected level moves into the status. |

### 20.10.2.2 Modifying a Milestone

**Important:** If modifications are made to an existing milestone, the changes are only applied to new orders. Existing orders for which milestone records have already been created are not considered.

To modify a milestone:

1. In the Monitoring window, choose the Milestones tab.
2. From the Milestones list, locate the applicable milestone and choose . The Milestone Details window displays.
3. Enter information in the applicable fields. Refer to Table 20–22 for field value descriptions.
4. Choose .

### 20.10.2.3 Deleting a Milestone

To delete a milestone:

1. From the Monitoring window, choose the Milestones tab.
2. From the Milestones list, locate the applicable milestone and choose .

# 20.11 Defining Monitoring Events

Events are used in instances where the Enhanced Order Monitor may raise multiple alerts of the same type. For example, if an order with multiple lines that are shipped together has a shipment delay and you have configured the Enhanced Order Monitor to raise alerts when shipments are delayed at the line level, an alert of the same type would be raised against each line in the order. You can create rules to aggregate all of these similar alerts and raise one "root cause".

You can use the Monitor Events tab for:

- Creating an Event Rule
- Modifying an Event
- Deleting an Event

## 20.11.1 Creating an Event Rule

To create an event rule:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Monitor Events. The Monitor Events window displays.
2. From the Monitor Events list, choose . The Monitor Events Details window displays.
3. Enter information in the applicable fields. Refer to Table 20–24 for field value descriptions.
4. Choose .

***Table 20–24 Monitor Event Details Pop-Up Window***

| Field | Description |
|---|---|
| Event ID | Enter the event ID. |
| Description | Enter a brief description of the event. |
| Requires Realert | Select this field if you want users to be re-alerted if the issue has not been resolved within a certain timeframe. |
| Realert Interval | If you selected Requires Realert, enter the interval (in hours) that re-alerts should be sent. |
| Automatically Resolve Alerts | This flag must be checked to trigger a monitor event every time an alert condition is detected on an order. To trigger an alert only once when the alert condition is met, uncheck this flag. |
| Event Identified By | |
| Order | Select this field if you want two or more alert conditions to be treated the same if they belong to the same order.<br>**Note:** This field can be selected in conjunction with Order Line and/or Order Release fields. |

*Table 20–24 Monitor Event Details Pop-Up Window*

| Field | Description |
|---|---|
| Order Line | Select this field if you want two or more alert conditions to be treated the same if they belong to the same order line.<br>**Note:** This field can be selected in conjunction with Order and/or Order Release fields. |
| Order Release | Select this field if you want two or more alert conditions to be treated the same if they belong to the same order release.<br>**Note:** This field can be selected in conjunction with Order and/or Order Line fields. |
| Ship Node | Select this field if you want two or more alert conditions to be treated the same if they belong to the same ship node.<br>**Note:** This field must be used in conjunction with the Order, Order Line, and/or Order Release fields. |
| Seller Organization | Select this field if you want two or more alert conditions to be treated the same if they belong to the same Seller.<br>**Note:** This field must be used in conjunction with the Order, Order Line, and/or Order Release fields. |
| Buyer Organization | Select this field if you want two or more alert conditions to be treated the same if they belong to the same Buyer.<br>**Note:** This field must be used in conjunction with the Order, Order Line, and/or Order Release fields. |
| Service To Be Invoked | Select the alert service to be invoked should the event consolidation rule conditions be met. |
| Aggregate And Invoke Service For | |
| Order | Select this field if you want only one alert to be raised for an order when alert conditions are detected. |
| Order Line | Select this field if you want only one alert to be raised per order line when alert conditions are detected. |
| Order Release | Select this field if you want only one alert to be raised for an order release when alert conditions are detected. |

*Table 20–24 Monitor Event Details Pop-Up Window*

| Field | Description |
|---|---|
| Ship Node | Select this field if you want only one alert to be raised for a particular ship node when alert conditions are detected. |
| Seller Organization | Select this field if you want only one alert to be raised for a particular Seller when alert conditions are detected. |
| Buyer Organization | Select this field if you want only one alert to be raised for a particular Buyer when alert conditions are detected. |

**Note:** In most cases the attributes that identify an event should be a subset of the attributes that specify event aggregation.

## 20.11.2 Modifying an Event

To modify an event rule:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Monitor Events. The Monitor Events window displays.
2. From the Monitor Events list, select the applicable event rule and choose . The Monitor Event Details window displays.
3. Enter information in the applicable fields. Refer to Table 20–24 for field value descriptions.
4. Choose .

## 20.11.3 Deleting an Event

To delete an event rule:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Monitor Events. The Monitor Events window displays.
2. From the Monitor Events list, select the applicable event rule and choose .

# 20.12 Defining Transaction Dependencies

Transaction dependency enables you to process an order based on certain conditions defined for a transaction. It provides the ability for a transaction to allow some order lines to not be processed until certain conditions are met. These conditions can also apply to other lines in the same order.

For example, a customer orders a DSL modem along with the DSL line activation service. In this scenario, the modem cannot be shipped until the account is activated. As a result, you need to sequence the order. The sequencing of the order can be based on:

1. Transaction completion of certain lines, such as the account activation being completed before the modem could be shipped.
2. Specific dates, such as not to ship the modem until 5 days before the activation date.

> **Note:** The above mentioned rules, do not apply for all types of order lines. Bundle order fulfillment cannot be configured with the transaction or date-type dependency because the order lines can have interdependencies such that a bundle parent line cannot move forward in the pipeline until all the child lines are fulfilled.

You can configure transaction dependencies in groups, with one dependency group being active at a time. The dependencies are configured at an enterprise, document type, or process type level and are applied while processing the order. If necessary, the enterprise level inheritance can be used.

The dependencies are configured in two steps:

1. The dependent lines are configured by specifying the item ID, classification, or a service type. An optional condition builder is also included to identify lines based on other order lines and header attributes such as a line type.
2. Once the rules are defined, you can configure additional constraints based on either of the dependency types:
   - Transaction Based

– Date Based

Each of these dependencies are modeled as a constraint accounting for approximately 20 different template types serving the general, bundle, and item attributes.

The limitations assumed by transaction dependencies are:

- The dependency rules specified by a transaction is independent of the pipeline or the order.
- Even though transaction dependency can understand the relationship between multiple lines and dates, it does not take into consideration all the due date dependencies. For example, if the DSL activation due date is modified, the dependency does not identify how much longer the other dependent lines can be delayed.

You can use the Transaction Dependencies branch for:

- Defining a Default Dependency Group
- Creating a Transaction Dependency Group
- Creating a Dependency Rule Constraint
- Modifying a Transaction Dependency Group
- Deleting a Transaction Dependency Group

## 20.12.1 Defining a Default Dependency Group

To define a Default Dependency Group:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Transaction Dependencies. The Transaction Dependency window for the chosen document type displays.
2. In the Default Dependency Group field, select one of the available transaction dependency groups from the drop-down list. Refer to Table 20–25 for field value descriptions.
3. Choose .

***Table 20–25 Transaction Dependency Window***

| Field | Description |
|---|---|
| Default Dependency Group | Select the default transaction dependency group to use. |
| Transaction Dependency Groups<br>For more information about creating a transaction dependency group, see Section 20.12.2, "Creating a Transaction Dependency Group". | |
| Group | The name of the transaction dependency group. |
| Group Description | The description of the transaction dependency group. |

## 20.12.2 Creating a Transaction Dependency Group

To create a Transaction Dependency Group:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Transaction Dependencies. The Transaction Dependency window for the chosen document type displays.
2. From the Transaction Dependency Groups list, choose . The Transaction Dependency Group Detail window displays.
3. Enter information into the applicable fields. Refer to Table 20–26 for field value descriptions.

4. Choose .
5. After saving the transaction dependency group, you can add transaction dependency rules to the group. For more information refer to Section 20.12.2.1, "Creating a Transaction Dependency Rule".

***Table 20–26 Transaction Dependency Group Detail Window***

| Field | **Description** |
|---|---|
| Group | Enter the name of the transaction dependency group. |
| Group Description | Enter the description of the transaction dependency group. |
| Transaction Dependency Rules<br>For more information about creating a transaction dependency rule, see Section 20.12.2.1, "Creating a Transaction Dependency Rule". | |
| Transaction Dependency Name | The name of the transaction dependency rule. |
| Transaction Name | The transaction allowed to run based on this transaction dependency. |

### 20.12.2.1 Creating a Transaction Dependency Rule

To create a transaction dependency rule:

1. From the Transaction Dependency Group Detail window, choose from the Transaction Dependency Rules list. The Transaction Dependency Rule Detail window displays.
2. Enter information into the applicable fields. Refer to Table 20–27 for field value descriptions.
3. Choose .

***Table 20–27 Transaction Dependency Rule Detail Window***

| Field | Description |
|---|---|
| Dependency | Enter the name for this transaction dependency. |
| Apply Dependency To Any Order Line Having | From the drop-down list, select the criterion you want to use for the order lines to which this dependency can be applied.<br>Depending on the criterion you select, you may have to indicate specific items, or service types. To specify these items or service types, choose . The corresponding list screen displays. |
| Condition | The condition that is created for this transaction dependency rule. The order fulfillment condition builder displays.<br>For more information about creating conditions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.<br>The field values of the order fulfillment condition builder are provided in the ORDER_TRANDEP_CONDITION template.<br>`<OrderLine LineType="" OrderedQty="">`<br>`<LinePriceInfo LineTotal="" UnitPrice=""/>`<br>`<Order BuyerOrganizationCode="" EnterpriseCode="" OrderType="" SellerOrganizationCode=""/>`<br>`</OrderLine>`<br>**Note:** The icon is disabled in the condition builder screen since there are no related entities affected by this condition. |
| Allow Transaction To Execute Only If The Following Conditions Are Met | From this drop-down list, select the transaction that is allowed to run based on the conditions indicated in this transaction dependency rule. |
| **Dependency Rule Constraints** | |
| The dependency constraints are populated based on the created rule. For information about creating the dependency rule constraints, see Section 20.12.2.1.1, "Creating a Dependency Rule Constraint". | |

#### 20.12.2.1.1 Creating a Dependency Rule Constraint

To create a dependency constraint rule:

1. From the Transaction Dependency Rule Detail window, choose from the Dependency Rules Constraint List. The Constraint Detail window for the chosen document type displays.
2. Enter information into the applicable fields. Refer to Table 20–28 for field value descriptions.
3. Choose OK.

***Table 20–28 Constraint Detail Window***

| Field | Description |
|---|---|
| Transaction Based Dependencies | Choose this option if this dependency is transaction based, and select the constraint type you want to use from the drop-down list. |
| Date Type Based Dependencies | Choose this option if this dependency is date type based, and select the constraint type you want to use from the drop-down list. |
| Constraint Type | Based on the template you have selected, click where indicated to fill in the desired values necessary to complete this constraint type. |

#### 20.12.2.1.2 Modifying a Dependency Rule Constraint

To modify a dependency rule constraint:

1. From the Transaction Dependency Rule Detail window, select the constraint type you wish to modify and choose . The Dependency Detail window for the chosen constraint displays.
2. Edit the information in the applicable fields. Refer to Table 20–28 for field value descriptions.
3. Choose .

#### 20.12.2.1.3 Deleting a Dependency Rule Constraint

To delete a dependency rule constraint:

1. From the Transaction Dependency Rule Detail window, select the constraint type you wish to delete.
2. Choose .

### 20.12.2.2 Modifying a Transaction Dependency Rule

To modify a transaction dependency rule:

1. From the Transaction Dependency Group Details window, select the transaction dependency rule you wish to modify and choose . The Transaction Dependency Rule Detail window for the chosen constraint displays.
2. Edit the information in the applicable fields. Refer to Table 20–27 for field value descriptions.
3. Choose OK.

### 20.12.2.3 Deleting a Transaction Dependency Rule

To delete a transaction dependency rule:

1. From the Transaction Dependency Group Details window, select the transaction dependency rule you wish to delete.
2. Choose .

## 20.12.3 Modifying a Transaction Dependency Group

To modify a transaction dependency group:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Transaction Dependencies. The Transaction Dependencies window for the chosen document type displays.
2. From the Transaction Dependency Groups list, select the transaction dependency group you wish to modify and choose . The Transaction Dependency Group Details window displays.
3. Edit the information in the applicable fields. Refer to Table 20–26 for field value descriptions.
4. Choose .

## 20.12.4 Deleting a Transaction Dependency Group

To delete a transaction dependency group:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Transaction Dependencies. The Transaction Dependencies window for the chosen document type displays.
2. From the Transaction Dependency Groups list, select the applicable transaction dependency group and choose .

# 21

# Configuring an Opportunity Document's Fulfillment-Specific Components

To complete an Opportunity document's lifecycle, an Opportunity flows through the Opportunity Fulfillment process type. You can configure the rules and components that are specific to an Opportunity document's fulfillment process type.

You can use process type configuration for:

- Defining Process Type Details
- Configuring Process Type Pipelines
- Configuring Purge Criteria

## 21.1 Defining Process Type Details

You can define the parameters and templates that distinguish a process type.

For more information about defining process type details, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

## 21.2 Configuring Process Type Pipelines

A process type pipeline is a series of transactions and statuses that guide a document type, such as an Opportunity, through a predefined process. A pipeline consists of the different statuses a document goes through during fulfillment. You can also set up transactions consisting of events, actions, and conditions, as they pertain to the Opportunity pipeline.

### Repositories

A repository is a logical collection of entities that define the business process workflow.

The following entities are included in a repository:

- Pipelines
- Transactions
- Statuses
- Conditions
- Actions
- Services

Selling and Fulfillment Foundation provides a base repository for the Opportunity process type. Some of the entities within a repository are copied when a new document type is created. For more information about creating a new document type, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

The process of Opportunity Fulfillment is modeled through a pipeline. This represents the process configuration that is unique to an organization. An organization may also specify unique processes for each participating Enterprise.

## 21.2.1 Pipelines

For more information about configuring pipelines, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To view the Opportunity Fulfillment pipeline details:

1. From the tree in the application rules side panel, select Opportunity > Opportunity Fulfillment > Opportunity Process Model. The Opportunity Fulfillment window is displayed.

2. Select Opportunity Fulfillment Repository > Pipelines > Opportunity Fulfillment.

   The Pipeline Detail: Opportunity Fulfillment (Opportunity Fulfillment) window is displayed.

For more information about creating and modifying a pipeline, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

## 21.2.2 Transactions

The Opportunity process type has a set of base transactions defined for it. A transaction is a logical unit of work that is necessary for performing activity within Selling and Fulfillment Foundation. Base transactions are predefined transactions that contain information about how the transactions behave. Base transactions can be used to create new transactions. These transactions can also be changed within the limits defined in the base transaction.

For more information about Transactions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To view the transaction details pertaining to an Opportunity Fulfillment pipeline:

1. From the tree in the application rules side panel, select Opportunity > Opportunity Fulfillment > Opportunity Process Model. The Opportunity Fulfillment window is displayed.
2. In the Opportunity Fulfillment window, click .

The Transactions tab window, containing the information described in Table 21–1, is displayed.

***Table 21–1 Opportunity Fulfillment Pipeline - Transactions Tab Window***

| Field | Description |
|---|---|
| Change Opportunity | This transaction represents any modifications that may be made to an opportunity. |
| Change Opportunity Status | This transaction represents any modifications that may be made involving the status of an opportunity. |
| Create Opportunity | This transaction represents the creation of an opportunity in the system. |
| Opportunity Lost | This transaction represents the process of an opportunity being lost. |
| Opportunity Won | This transaction represents the process of an opportunity being won, as a result of a sales order being created from a quote that is associated with this opportunity. |
| Process Opportunity | This transaction moves the status of an opportunity from Inquiry to Negotiation. |

***Table 21–1 Opportunity Fulfillment Pipeline - Transactions Tab Window***

| Field | Description |
|---|---|
| Purge Opportunity | This transaction represents an opportunity that can be purged and moved from the tables into the history tables. |
| Purge Opportunity History | This transaction represents the process of purging opportunities from the history tables and removing them from the system. |

For more information about creating and modifying transactions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

## 21.2.3 Statuses

Statuses are the actual states that an Opportunity document moves through in a pipeline. A transaction can contain two types of statuses, a drop status and a pickup status. An Opportunity document is moved into the drop status when the events and conditions of a transaction have been completed. A pickup status takes the Opportunity document from the previous drop status and moves it through the next transaction. Negotiation and Won are examples of Opportunity statuses.

For more information about Statuses, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To view the status details of an Opportunity Fulfillment pipeline:

1. From the tree in the application rules side panel, select Opportunity > Opportunity Fulfillment > Opportunity Process Model. The Opportunity Fulfillment window is displayed.
2. In the Opportunity Fulfillment window, click .

   The Statuses tab window, containing the information described in Table 21–2, is displayed.

***Table 21–2 Opportunity Fulfillment Pipeline - Statuses Tab Window***

| Field | Description |
|---|---|
| Inquiry | This indicates that an opportunity has been created, and there is no quote associated with the opportunity. |
| Negotiation | This indicates that a negotiation pertaining to a quote for this opportunity is in progress between a seller and a buyer. |
| Won | This indicates that an opportunity has been won because a sales order has been created from an associated quote. |
| Lost | This indicates that an opportunity has been lost because the associated quotes are abandoned or have expired. |

For more information about creating and modifying statuses, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

## 21.2.4 Conditions

A condition matches document type attributes against decision points, and routes the documents to different paths based on the specified attribute and value combinations. The document type attributes against which conditions can be created are predefined in Selling and Fulfillment Foundation. You can either use these attributes in any combination, or you can create conditions that run the appropriate application logic for specific circumstances.

For more information about conditions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To view the condition details of an Opportunity Fulfillment pipeline:

1. From the tree in the application rules side panel, select Opportunity > Opportunity Fulfillment > Opportunity Process Model. The Opportunity Fulfillment window is displayed.
2. In the Opportunity Fulfillment window, click .

   The Conditions tab window, containing the information described in Table 21–3, is displayed.

***Table 21–3 Opportunity Fulfillment Pipeline - Conditions Tab Window***

| Field | Description |
|---|---|
| New Condition Group | Displays conditions that are specific to the Opportunity Fulfillment pipeline. |

For more information about creating and modifying conditions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

### 21.2.5 Actions

An action is a process or program that is triggered by an event. These processes and programs send user alert notifications and automatically resolve issues.

For more information about Actions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To view the action details of an Opportunity Fulfillment pipeline:

1. From the tree in the application rules side panel, select Opportunity > Opportunity Fulfillment > Opportunity Process Model. The Opportunity Fulfillment window is displayed.
2. In the Opportunity Fulfillment window, click .

   The Actions tab window is displayed.

For more information about creating and modifying actions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

## 21.3 Configuring Purge Criteria

You can define the parameters used when purging the records pertaining to an Opportunity from the system.

For more information about Purge Criteria, see Chapter 24, "Configuring a Document's Purge Criteria".

# 22

# Configuring an Order Document's Shipment-Specific Components

**Important:** Be aware that return fulfillment requires sourcing configuration. Sourcing configuration is accessible through the Distributed Order Management configuration grouping. For more information about configuring sourcing, see Section 3.5, "Defining Sourcing and Scheduling Rules".

To complete an order document's lifecycle, each document has a set of different processes that it can go through. These processes are called process types. Every order document has a defined set of process types in Selling and Fulfillment Foundation.

The following process types are defined in Selling and Fulfillment Foundation for the order document types:

- Fulfillment
- Negotiation
- Shipment
- Receipt

You can configure the rules and components specific to an order document's shipment process type.

You can use process type configuration for:

- Defining Hold Types
- Defining Process Type Details

- Process Type Pipeline Configuration
- Defining Monitoring Components
- Defining Monitoring Events
- Defining Shipment Preferences


## 22.1 Defining Hold Types

Shipments can be placed on hold manually or automatically by applying a particular hold type. Certain transactions can be configured to ensure that shipments put on hold are not processed. Likewise, modification types can be configured to ensure shipments that are on hold are not processed. By default, all transactions and modification types are allowed to process all documents for all hold types.

To prevent transactions from processing shipments that are put on hold, in the Others tab in the Transaction Detail screen, check the "This Transaction Can Be Stopped From Processing Shipments That Are On Hold" box. For more information about viewing transaction details, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To create, modify, and delete hold types, from the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Outbound Logistics > Hold Types. For more information about defining hold types, see the *Sterling Logistics Management: Configuration Guide*.

## 22.2 Defining Process Type Details

You can define the parameters and templates that distinguish a process type.

For more information about defining process type details, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

## 22.3 Process Type Pipeline Configuration

A **process type pipeline** is a series of transactions and statuses that guide document types, such as a Sales Order, through a predefined process. A pipeline consists of the different statuses a document goes through during fulfillment, negotiation, shipment, or receipt. You can also

set up transactions consisting of events, actions, and conditions, as they pertain to the pipeline you are configuring.

### Repositories

A repository is a logical collection of entities that define the business process workflow.

The following entities are included in a repository:

- Pipelines
- Transactions
- Statuses
- Conditions
- Actions
- Services

Selling and Fulfillment Foundation provides a base repository for each of the system defined process types. Some of the entities within a repository are copied when creating a new document type. For more information about creating a new document type, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

The process of shipment is modeled through a pipeline. This represents the process configuration that is unique to an organization. An organization may also specify unique processes for each participating Enterprise.

## 22.3.1 Defining Pipeline Determination

**Pipeline determination** is used to set up conditions that affect which pipeline is used during the start of the business process workflow. For example, an organization deals with sales orders that sometimes contain hazardous materials. They have two separate pipelines, one in which orders with order lines without any hazardous materials go through and one in which orders with order lines containing hazardous materials must go through for inspection before continuing through the order process. The organization uses pipeline determination to set up a condition that determines whether or not order lines contain hazardous materials and sends the order line down the correct pipeline.

When you expand the Pipeline Determination branch, the components displayed depends on what role you are logged in as. If you are logged in as a Hub role, the Hub Rule displays. If you are logged in as an Enterprise role, both the Hub Rule and My Rule components display. Double-click on the applicable node to display the pipeline determination rules.

**Note:** If you are logged in as an Enterprise role, the Hub Rule screen is grayed out and cannot be modified.

Drag conditions and pipelines into the work area to construct pipeline determination rules. A single pipeline or condition must be the root. Conditions cannot link back to an earlier component in the chain and a pipeline cannot be linked to twice.

**Note:** When configuring pipeline determination for an order document type pipeline, please note that pipeline determination is only considered when adding a line or creating an order. When changes are made to draft orders pipeline determination does not occur.

## 22.3.2 Pipelines

For more information about configuring pipelines, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To view the outbound shipment pipeline details:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Outbound Logistics > Shipment Process Model. The Outbound Shipment window displays.

2. In the Outbound Shipment window, choose Outbound Shipment Repository > Pipelines > Outbound Shipment.
3. The Pipeline Detail: Outbound Shipment (Outbound Shipment) window displays.

For more information about creating and modifying a pipeline, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

## 22.3.3 Transactions

Every process type has a set of base transactions defined for it. A transaction is a logical unit of work that is necessary for performing activity within Selling and Fulfillment Foundation. Base transactions are predefined transactions that contain information about how the transaction behaves, such as how many copies of a transaction can be kept in a process type and whether or not it can have configurable base pick and drop statuses. Base transactions can be used to create new transactions. These transactions can be changed within the limits defined in the base transaction.

For more information about transactions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To view the transaction details for an outbound shipment pipeline:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Outbound Logistics > Shipment Process Model. The Outbound Shipment window displays.
2. In the Outbound Shipment window, choose .
3. The Transactions tab window displays.

For more information about creating and modifying transactions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

*Table 22–1 Outbound Shipment Pipeline - Transactions Tab Window*

| Field | Description |
|---|---|
| Cancel Shipment | This transaction represents the process of cancelling a shipment. |
| Change Shipment | This transaction represents any modifications that may be made to a shipment. |
| Change Shipment Status | This transaction represents any modifications that may be made involving an order or order line's status. |
| Close Shipment | This transaction represents a shipment being closed and archived in the system. |
| Confirm Shipment | This transaction represents a shipment is manually confirmed and shipped. |
| Create And Confirm Shipment | This transaction represents the process of creating a shipment and shipping it. |
| Create Shipment | This transaction represents the creation of a shipment in the system. |
| Create Shipment Invoice | This transaction represents the creation of a shipment invoice. |
| Deliver Shipment | This transaction represents a shipment being delivered. |
| ESP Evaluator | This transaction represents the shipment being evaluated for ESP terms of weight and volume. |
| Import Shipment | This transaction represents the process of importing a shipment that has already been processed to some extent by an external system. |
| Pack Shipment | This transaction represents the process of packing a shipment. |
| Pack Shipment Complete | This transaction represents the completion of the packing process. |
| Print Pick List | This transaction represents the process of printing a pick list. |
| Purge Pick List | This transaction represents a pick list that can be purged from the system. |
| Purge Shipment | This transaction represents the process of moving shipments to the history tables. |

*Table 22–1 Outbound Shipment Pipeline - Transactions Tab Window*

| Field | Description |
|---|---|
| Purge Shipment History | This transaction represents the process of purging shipments from the history tables and removing them from the system. |
| Receipt Closure Listener | This listener transaction monitors the receipt pipeline and indicates when the receipt has been closed. |
| Route Shipment | This transaction represents the process of assigning carriers to a shipment based on routing guidelines. When possible, it creates consolidated shipments into loads to save on transporting costs. |
| Sent To Node | This transaction represents the process of sending a created shipment to a node to be pick, packed, and shipped. |
| Shipment Monitor | This transaction represents the process of monitoring shipments in the system based on defined parameters. |
| Split Shipment | This transaction represents splitting an existing shipment into multiple shipments. |
| Synchronize Task Queue | This transaction represents the process of synching the order fulfillment task queue. |
| Undo Pack Shipment Complete | This transaction indicates that a shipment that has moved through the Pack Shipment Complete transaction is undone. |
| Unpack Shipment | This transaction represents the process of unpacking a shipment that has already been packed. |

## 22.3.4 Statuses

**Statuses** are the actual states that a document moves through in the pipeline. A transaction can contain two types of statuses, a drop status and a pickup status. A document is moved into a **drop status** when the events and conditions of a transaction have been completed. A **pickup status** takes the document from the previous drop status and moves it through the next transaction. Created and Scheduled are examples of statuses.

For more information about statuses, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To view the status details of an outbound shipment pipeline:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Outbound Logistics > Shipment Process Model. The Outbound Shipment window displays.
2. In the Outbound Shipment window, choose .
3. The Statuses tab window displays.

For more information about creating and modifying statuses, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

***Table 22–2 Outbound Shipment Pipeline - Statuses Tab Window***

| Field | Description |
|---|---|
| Shipment Created | This indicates that a shipment has been created. |
| ESP Check Required | This indicates that the ESP evaluator must be run to determine if ESP conditions have been met. |
| On ESP Hold | This indicates that the shipment is being held until ESP conditions are met. |
| Released From ESP Hold | Indicates that the shipment has been released from ESP hold. |
| Released For Routing | Indicates that the shipment has met specified parameters for routing guidelines to be applied to it. For more information about configuring routing guidelines, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*. |
| Awaiting Routing | Indicates that routing guidelines must be applied to the shipment before it continues through the pipeline. For more information about configuring routing guidelines, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*. |
| Shipment Routed | This indicates that routing guidelines have been applied to the shipment. For more information about configuring routing guidelines, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*. |
| Sent To Node | This indicates that the shipment has been sent to be packed |
| Shipment Being Picked | This indicates that the line items are physically being picked in preparation for shipment. |
| Shipment Packed | This indicates that the shipment has been packed. |
| Shipment Shipped | This indicates that the shipment has been shipped to the ship to address. |
| Shipment Delivered | This indicates that the shipment has been delivered to the ship node address. |
| Included In Receipt | This indicates that the shipment has been included in the receipt. |
| Receipt Closed | This indicates that the shipment has been received and is considered complete. |

*Table 22–2 Outbound Shipment Pipeline - Statuses Tab Window*

| Field | Description |
|---|---|
| Shipment Invoiced | This indicates that an invoice has been created for the shipment. |
| Shipment Cancelled | This indicates that the shipment has been cancelled. |

## 22.3.5 Conditions

A **condition** matches document type attributes against decision points and routes the documents to different paths based on the specified attribute and value combinations. The document type attributes against which conditions can be created are predefined in Selling and Fulfillment Foundation. You can use these attributes in any combination or you can create conditions that run the appropriate application logic for specific circumstances.

For more information about conditions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To view the condition details of an outbound shipment pipeline:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Outbound Logistics > Shipment Process Model. The Outbound Shipment window displays.
2. In the Outbound Shipment window, choose .
3. The Conditions tab window displays.

For more information about creating and modifying conditions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

***Table 22–3 Outbound Shipment Pipeline - Conditions Tab Window***

| Field | Description |
|---|---|
| ESP Check Required | This condition is used to determine whether a shipment requires an ESP check. |
| Routing Required | This condition is used to determine whether a shipment requires routing guidelines to be applied to it. For more information about configuring routing guidelines, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*. |

## 22.3.6 Actions

An **action** is a process or program that is triggered by an event. These processes and programs send user alert notifications and automatically resolve issues.

For example, when an order is released (the event), you can set an action to send the customer an e-mail.

For more information about actions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To view the action details of an outbound shipment pipeline:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Outbound Logistics > Shipment Process Model. The Outbound Shipment window displays.
2. In the Outbound Shipment window, choose .
3. The Actions tab window displays.

For more information about creating and modifying actions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

## 22.4 Defining Monitoring Components

You can define the components used to measure and report unexpected conditions and delays in the order document's lifecycle. For more information about using these components to configure monitoring rules, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To define monitoring components, from the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Outbound Logistics > Shipment Monitoring. The Monitoring window displays.

You can use the Monitoring window for:

- Defining Date Types
- Defining Milestones

### 22.4.1 Defining Date Types

You can define custom date types. These dates automatically appear in the configuration screen and the Order/Shipment Dates window in the Console.

You can use the Date Types tab for:

- Creating a Date Type
- Modifying a Date Type
- Deleting a Date Type

### 22.4.1.1 Creating a Date Type

To create a date type:

1. In the Monitoring window, choose the Date Types tab.
2. From the Date Types list, choose . The Date Type Details window displays.
3. Enter information in the applicable fields. Refer to Table 22–4 for field value descriptions.
4. Choose .

***Table 22–4 Date Type Details Window***

| Field | Description |
|---|---|
| Date Type | Enter the name of the date type. |
| Description | Enter a brief description of the date type. |
| Requested | Select this field to indicate if the date type represents a date requested by a Buyer, user, etc. |

*Table 22–4 Date Type Details Window*

| Field | Description |
|---|---|
| Expected | Select this field to indicate if the date type represents a date the system expects or has calculated something to occur. |
| Actual | Select this field to indicate if the date type represents the actual date. |

### 22.4.1.2 Modifying a Date Type

To modify a date type:

5. In the Monitoring window, choose the Date Types tab.
6. From the Date Types list, locate the applicable date type and choose . The Date Type Details window displays.
7. Enter information in the applicable fields. Refer to Table 22–4 for field value descriptions.
8. Choose .

### 22.4.1.3 Deleting a Date Type

To delete a date type:

**Note:** The following system dates cannot be deleted:

- Delivery Date
- Ship Date

1. In the Monitoring window, choose the Date Types tab.
2. From the Date Types list, locate the applicable date type and choose .

## 22.4.2 Defining Milestones

You can configure applicable statuses in a process type to be milestones. A milestone is a type of date that Selling and Fulfillment Foundation automatically determines when an order moves from one status to another. A milestone represents a significant point in the processing

lifecycle that can be used as a criterion for monitoring. Milestones can be defined at the order, order line, and order release.

> **Note:** A milestone can be reached whenever there is a change in an order line. Selling and Fulfillment Foundation marks a milestone as reached if an order line reaches a status marked as a milestone. However, there may be times that only part of an order line reaches a particular status defined as milestone.

You can use the Milestones tab for:

- Creating a Milestone
- Modifying a Milestone
- Deleting a Milestone

### 22.4.2.1 Creating a Milestone

To create a milestone:

1. In the Monitoring window, choose the Milestones tab.
2. From the Milestones list, choose . The Milestone Details window displays.
3. Enter information in the applicable fields. Refer to Table 22–5 for field value descriptions.
4. Choose .

***Table 22–5 Milestone Details***

| Field | Description |
|---|---|
| Date Type | Enter the name of the milestone being created.<br>**Note:** You cannot use date types you have created on the date type tab. You must create a unique name for the milestone. |
| Description | Enter a brief description of the milestone. |
| Requested | Select this field to indicate if the milestone represents a date requested by a Buyer, user, etc. |
| Expected | Select this field to indicate if the milestone represents a date the system expects or has calculated something to occur. |
| Actual | This field is not applicable for milestones. |
| Milestone Statuses | You can add statuses to associate with the milestone by selecting and entering information in the applicable fields.<br>**Note:** This tab can only be accessed once the Primary Info tab has been filled out and saved. |
| Date Type | The date type if any associated with the milestone. |
| Status | Select the status you want use to indicate the milestone has been reached. |

*Table 22–5 Milestone Details*

| Field | Description |
|---|---|
| Level | Select Order to indicate this status must be reached at the order header level.<br>Select Order Line to indicate that this status must be reached at the order line level.<br>Select Order Release to indicate that this status must be reached at the order release level. |
| Quantity Type | Select Initial to indicate that the milestone is met when any quantity at the above selected level moves into the status.<br>Select Complete to indicate that the milestone is met when all quantity at the above selected level moves into the status. |

### 22.4.2.2 Modifying a Milestone

**Important:** If modifications are made to an existing milestone, the changes are only applied to new orders. Existing orders for which milestone records have already been created are not considered.

To modify a milestone:

1. In the Monitoring window, choose the Milestones tab.
2. From the Milestones list, locate the applicable milestone and choose . The Milestone Details window displays.
3. Enter information in the applicable fields. Refer to Table 22–5 for field value descriptions.
4. Choose .

### 22.4.2.3 Deleting a Milestone

To delete a milestone:

1. From the Monitoring window, choose the Milestones tab.
2. From the Milestones list, locate the applicable milestone and choose .

# 22.5 Defining Monitoring Events

Events are used in instances where the Order Monitor may raise multiple alerts of the same type. For example, if an order with multiple lines that are shipped together has a shipment delay and you have configured the Order Monitor to raise alerts when shipments are delayed at the line level, an alert of the same type would be raised against each line in the order. You can create rules to aggregate all of these similar alerts and raise one "root cause".

You can use the Monitor Events tab for:

- Creating an Event Rule
- Modifying an Event
- Deleting an Event

## 22.5.1 Creating an Event Rule

To create an event rule:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Monitor Events. The Monitor Events window displays.
2. From the Monitor Events list, choose . The Monitor Events Details window displays.
3. Enter information in the applicable fields. Refer to Table 22–6 for field value descriptions.
4. Choose .

***Table 22–6 Monitor Event Details Pop-Up Window***

| Field | Description |
|---|---|
| Event ID | Enter the event ID. |
| Description | Enter a brief description of the event. |
| Requires Realert | Select this field if you want users to be re-alerted if the issue has not been resolved within a certain timeframe. |

***Table 22–6 Monitor Event Details Pop-Up Window***

| Field | Description |
|---|---|
| Realert Interval | If you selected Requires Realert, enter the interval (in hours) that re-alerts should be sent. |
| Automatically Resolve Alerts | This flag must be checked to trigger a monitor event every time an alert condition is detected on an order. To trigger an alert only once when the alert condition is met, uncheck this flag. |
| Event Identified By | |
| Shipment | Select this field if you want two or more alert conditions to be treated the same if they belong to the same shipment. |
| Service To Be Invoked | Select the alert service to be invoked should the event consolidation rule conditions be met. |
| Aggregate And Invoke Service For | |
| Shipment | Select this field if you want only one alert to be raised for a shipment when alert conditions are detected. |

**Note:** In most cases the attributes that identify an event should be a subset of the attributes that specify event aggregation.

## 22.5.2 Modifying an Event

To modify an event rule:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Monitor Events. The Monitor Events window displays.
2. From the Monitor Events list, select the applicable event rule and choose . The Monitor Event Details window displays.
3. Enter information in the applicable fields. Refer to Table 22–6 for field value descriptions.
4. Choose .

### 22.5.3 Deleting an Event

To delete an event rule:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Fulfillment > Monitor Events. The Monitor Events window displays.
2. From the Monitor Events list, select the applicable event rule and choose ✕.

## 22.6 Defining Shipment Preferences

Shipment preferences can be created to enable over shipment of products, or allow the creation of shipments without order information in the system.

Shipment Preferences are divided into two sets:

- Over Shipping Preferences
- Transaction Rules

### 22.6.1 Over Shipping Preferences

Over shipment is the ability to ship more than an ordered quantity. Over shipment tolerance definitions can be configured using the following criteria:

- Line Type
- Seller Organization Code
- CustomerVendor Classification/BuyerSeller Organization Code
- Item Classification/Item ID

During shipment, if a shipping preference has not been configured that matches the criteria of the shipment line, over shipment is not allowed. Otherwise, over shipment within the specified percentage is allowed.

You can use the Shipping Preference branch for:

- Creating a Shipment Preference
- Modifying a Shipment Preference
- Deleting a Shipment Preference

### 22.6.1.1 Creating a Shipment Preference

To create a shipment preference:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Outbound Logistics > Shipping Preference. The Shipping Preferences window displays.
2. In the Shipping Preferences window, choose the Over Shipping Preferences tab. The Shipping Preference Search panel displays.

3. In the Search Results panel, choose . The Shipping Preference Details pop-up window displays.
4. Enter information into the applicable fields. Refer to Table 22–7 for field value descriptions.
5. Choose .

***Table 22–7 Shipping Preference Details***

| Field | Description |
|---|---|
| Line Type | Select the line type you want to allow over shipment for. |
| Item ID | Enter the item ID of the item you want to allow over shipment for, if applicable. |
| Item Classification | Enter the item classification group you want to allow over shipment for, if applicable. For more information about item classification, see the *Catalog Management: Configuration Guide*. |
| Seller Organization | Select the Seller organization that you want to allow to over ship. |
| Buyer Organization | Select the Buyer organization that you want to be able to receive over shipments. |
| Customer Classification | Select the customer classification that you want to be able to receive over shipments, if applicable. |
| Over Ship Percentage | Enter the percentage allowed for over shipment. |

### 22.6.1.2 Modifying a Shipment Preference

To modify a shipment preference:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Outbound Logistics > Shipping Preference. The Shipping Preferences window displays.
2. In the Shipping Preferences window, choose the Over Shipping Preferences tab. The Shipping Preference Search panel displays.
3. Enter the applicable search criteria and choose . A list of preferences displays.
4. Select the applicable preference and choose . The Shipping Preference Details pop-up window displays.
5. Enter information into the applicable fields. Refer to Table 22–7 for field value descriptions.
6. Choose .

### 22.6.1.3 Deleting a Shipment Preference

To delete a shipment preference:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Outbound Logistics > Shipping Preference. The Shipping Preferences window displays.
2. In the Shipping Preferences window, choose the Over Shipping Preferences tab. The Shipping Preference Search panel displays.
3. Enter the applicable search criteria and choose . A list of preferences displays.
4. Select the applicable preference and choose .

## 22.6.2 Transaction Rules

Transaction Rules define whether the system allows the creation of shipments without an existing order information on the system.

To define transaction rules:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Outbound Logistics > Shipping Preference. The Shipping Preferences window displays.

2. In the Shipping Preferences window, choose the Transaction Rules tab.
3. Enter information in the applicable field. Refer to Table 22–8 for field value descriptions.
4. Choose .

***Figure 22–1 Transaction Rules, Shipping Preference***

***Table 22–8 Transaction Rules Tab***

| Field | Description |
|---|---|
| Order Available On System | Select the appropriate option from the drop-down list to ensure that the shipments are either created against existing orders or not. Options are:<br>• **May Be** - Select this option if the orders might be available on the system.<br>• **No** - Select this option if the orders are not available on the system.<br>• **Yes** - Select this option if the orders are available on the system. |

# 23

# Configuring a Document's Financial Components

You can define rules and common codes as they pertain to payments and charges for a given order document.

You can use the Financial Attributes branch for:

- Defining Payment Terms
- Defining Charge Definitions
- Defining Tax Names
- Defining Additional Payment Rules

## 23.1 Defining Payment Terms

You can define common codes for **payment terms** that you may have with your customers. These terms are pre-defined methods of payment.

You can use the Payment Terms tab for:

- Creating a Payment Term
- Modifying a Payment Term
- Deleting a Payment Term

### 23.1.1 Creating a Payment Term

To create a payment term:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Financials > Payment Terms. The Payment Terms window displays in the work area.

2. Choose . The Payment Term Details pop-up window displays.

3. In Payment Term, enter the name of the payment term.
4. In Short Description, enter a brief description of the payment term.
5. In Long Description, enter a more detailed description of the payment term.
6. Choose .

## 23.1.2 Modifying a Payment Term

To modify a payment term:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Financials > Payment Terms. The Payment Terms window displays in the work area.
2. Select the applicable payment term and choose . The Payment Term Details pop-up window displays.
3. In Short Description, enter a brief description of the payment term.
4. In Long Description, enter a more detailed description of the payment term.
5. Choose .

### 23.1.3 Deleting a Payment Term

To delete a payment term:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Financials > Payment Terms. The Payment Terms window displays in the work area.
2. Select the applicable payment term and choose .

## 23.2 Defining Charge Definitions

You can define **charge definitions** that you can associate with orders and invoices by creating charge categories. These categories contain a group of related charge names that can be used when the particular category is used. When adding a charge to an order header or an order line, you must use the charge categories that you have defined here. The charge name that is used on the order header or on the order line may or may not be defined, depending on the Validate Charge Name rule in the additional payment rules. For more information about this rule, see Section 23.4, "Defining Additional Payment Rules".

The default charge definitions of Selling and Fulfillment Foundation are:

- Shipping
- Handling
- Personalization
- Discount

> **Note:** The default charge definitions are only available to the Hub organization at the time of installation. Any Enterprises that are created must create their own charge definitions.

Use the Charge Definitions tab for:

- Creating a Charge Category
- Modifying a Charge Category
- Adding a Charge Name Associated with a Charge Category
- Modifying a Charge Name Associated with a Charge Category

- Deleting a Charge Name Associated with a Charge Category
- Deleting a Charge Category

## 23.2.1 Creating a Charge Category

To create a charge category:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Financials > Financial Attributes. The Financial window displays in the work area.
2. Choose the Charge Definitions tab.
3. Choose . The Charge Category Details window displays.

4. In Charge Category, enter the name of the charge category.

5. In Description, enter a brief description of the charge category.
6. Select Billable if the charge is billable. Non-billable charges are not considered in order totals, but do appear in invoices.
7. Select Is Fee (or Discount if applied to a pickup request) if the charge you are creating is a discount charge type.
8. Select Consider For Profit Margin Total if the category should be used for profit margin calculation.
9. Choose .

You can use the Charge Category Details window for:

- Adding a Charge Name Associated with a Charge Category
- Modifying a Charge Name Associated with a Charge Category
- Deleting a Charge Name Associated with a Charge Category

### 23.2.1.1 Adding a Charge Name Associated with a Charge Category

Charge names are names of the actual charges included in the charge definition.

> **Note:** Sterling Commerce recommends that you clearly specify between order charges and discount charges when naming a charge. In the Application Consoles both order charges and discount charges appear on the same screens and drop-down menu. There is no way for the user to distinguish which is an order charge and which is a discount charge other than its naming convention.

To add a charge name to a charge category:

1. In the Charge Category Details window, choose . The Charge Name Details pop-up window displays.

2. In Charge Name, enter the charge name.
3. In Description, enter a brief description of the charge name.
4. Choose .

**Note:** Charge names cannot be localized. For more information about localization, see the *Selling and Fulfillment Foundation: Localization Guide.*

**Note:** When you create a charge name, ensure that you define the same charge name for other document types that you are going to price, such as quotes, returns, and so forth.

### 23.2.1.2 Modifying a Charge Name Associated with a Charge Category

To modify a charge category's charge name:

1. In the Charge Category Details window, select the applicable charge name and choose . The Charge Name Details pop-up window displays.

2. In Description, enter a brief description of the charge name.
3. Choose .

#### 23.2.1.3 Deleting a Charge Name Associated with a Charge Category

To delete a charge category's charge name select the applicable charge name in the Charge Category Details window and choose .

### 23.2.2 Modifying a Charge Category

To modify a charge category:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Financials > Financial Attributes. The Financial window displays in the work area.
2. Choose the Charge Definitions tab.
3. Select the applicable charge category and choose . The Charge Category Details window displays.
4. In Description, enter a brief description of the charge category.
5. Select Billable if the charge is billable. Non-billable charges are not considered in order totals, but do appear in invoices.
6. Select Discount if the charge you are creating is a discount charge type.
7. Select Consider For Profit Margin Total if the category should be used for profit margin calculation.
8. Choose .

### 23.2.3 Deleting a Charge Category

To delete a charge definition:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Financials > Financial Attributes. The Financial window displays in the work area.
2. Choose the Charge Definitions tab.
3. Select the applicable charge category and choose .

# 23.3 Defining Tax Names

You can define common codes for tax names. **Tax names** are any specific taxes that may pertain to orders and invoices.

Selling and Fulfillment Foundation understands three different types of taxes: a tax against a price, against a charge, or a flat tax.

- A tax against a price is an additional cost for a percentage of the price of the order line.
- A tax against a charge is an additional cost for a percentage of an existing charge on the order header, or order line. When adding a tax against a charge, the charge category must be one that already exists on the order header, or on the order line.
- A flat tax is a fixed tax applied on an order, independently of any charge, or price.

You can use the Tax Names tab for:

- Creating a Tax Name
- Modifying a Tax Name
- Deleting a Tax Name

## 23.3.1 Creating a Tax Name

To create a tax name:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Financials > Financial Attributes. The Financial window displays in the work area.
2. Choose the Tax Names tab.
3. Choose . The Tax Name Details pop-up window displays.

4. In Tax Name, enter the name of the tax name.
5. In Short Description, enter a brief description of the tax name.
6. In Long Description, enter a more detailed description of the tax name.
7. Choose .

## 23.3.2 Modifying a Tax Name

To modify a tax name:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Financials > Financial Attributes. The Financial window displays in the work area.
2. Choose the Tax Names tab.
3. Select the applicable tax name and choose . The Tax Name Details pop-up window displays.
4. In Short Description, enter a brief description of the tax name.
5. In Long Description, enter a more detailed description of the tax name.
6. Choose .

### 23.3.3 Deleting a Tax Name

To delete a tax name:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Financials > Financial Attributes. The Financial window displays in the work area.
2. Choose the Tax Names tab.
3. Select the applicable tax name and choose .

## 23.4 Defining Additional Payment Rules

You can set up payment collection rules that are used when an order is sent for payment authorization.

**Note:** To define additional payment rules for quotes, refer to Section 23.4.1, "Defining Additional Payment Rules for Quotes".

To define additional payment rules:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Financials > Financial Rules. The Financial Rules window displays in the work area.

2. Enter information in the applicable fields. Refer to Table 23–1 for field value descriptions.
3. Choose .

***Table 23–1 Payment Rules***

| Field | Description |
|---|---|
| Hold Order For Authorization | Check this box if you want to hold the order for authorization purposes. |
| Use Same Authorization Multiple Times | Check this box if you want to use the same authorization for multiple transactions. |
| Allow Refund To Exceed Charged Amount | Check this box if you want to allow refunds to exceed the amount charged. |
| Validate Charge Name | Check this box to indicate that the system is to check that the charge names used for an order document are valid before proceeding with payment collection. |
| Create Invoice Before Order or Shipment | Check this box if you want to be able to create an informational invoice before an order or a shipment. |

| Field | Description |
|---|---|
| Apply Price Change To Invoiced Quantity | Check this box to apply the price changes to the invoiced quantity. If this box is unchecked, then price change after invoicing is not applied to the order. |
| Do Not Allow Debit And Credit Invoices To Settle Each Other | Check this box to ensure that positive and negative transactions are not able to negate each other. |
| Invoice Open Header Charges/Taxes On Invoice Complete | Check this box if you want all open header charges and taxes to be invoiced when an order is moved to the Invoice Complete status. |
| Allow Refunding of Negative Debts Before Sufficient Collection Has Occurred | When "Do Not Allow Debit And Credit Invoices To Settle Each Other" is checked, this rule determines whether the credit memo should refund immediately or wait until there are sufficient credits to refund on the order. This applies only to sales orders. |
| Disassociate Payment Processing of Advanced Pre-Paid Exchange Order from Return Order | Check this box if you do not want to transfer the fund between a return order and an advanced pre-paid exchange order.<br><br>When a return order is invoiced with this check box selected, the amount will be refunded to the payment method of the corresponding sales order. The payment method on the advanced pre-paid exchange order will be charged for the entire amount of the advanced pre-paid exchange order, and refund will happen for the entire amount of the return order.<br><br>**Note:** If this check box is selected, the return order invoice details will also contain the details of the refund.<br><br>**Note:** In case of a blind return order, if this check box is selected, the amount will be refunded to the payment method of the blind return order. |
| Prioritize INVOICED Payment Status Over REQUEST_CHARGE For Asynchronous Processing | Check this box if you want invoiced orders to remain in INVOICED status when asynchronous payment requests are made on the orders. If the box is unchecked, orders move to REQUESTED_CHARGE status, which indicates there is a pending charge on the orders. By default, this option is enabled. |

| Field | Description |
|---|---|
| Expiration for Authorization Days | Enter the number of days before the authorization expires at which a reauthorization request is automatically created by the Payment Collection time-triggered transaction. For example, if an order expires on 4/15, and the fixed number of days is 4, then the reauthorization request is created on 4/11. |
| Hold To Be Applied Due To Insufficient Funds In Customer Account | Create or choose the hold type to be applied for cases in which a customer account contains insufficient funds to complete a transaction.<br>**Note:** The hold is triggered internally by the system, and therefore, should not be set to automatically apply in the hold configuration. |
| Charge Name for Shipping | Select the charge name that represents the shipping charge on an order, as described in Section 23.2.1, "Creating a Charge Category".<br>**Note:** Do not use the same charge name that is used by a pricing rule. If the same charge name is used, unexpected pricing calculations will occur. |
| **Create Shipment Invoice for Bundle Parent on Invoicing of** | |
| All Bundle Components | Check this box to create a shipment invoice for the bundle parent once all bundle components have been invoiced. |
| First Bundle Component | Check this box to create a shipment invoice for the bundle parent once the first bundle component has been invoiced. |
| **Date for Pricing Confirmed Orders** | |
| Use System Date | Enable this radio button if you want pricing to be based on the current system date. |
| Use Order Date | Enable this radio button if you want pricing to be based on the order date. |

## 23.4.1 Defining Additional Payment Rules for Quotes

You can set up payment rules for the Quote document type.

To define additional payment rules:

1. From the tree in the application rules side panel, choose Document Specific > Quote > Financials > Financial Rules. The Financial Rules window displays in the work area.

2. Enter information in the applicable fields. Refer to Table 23–2 for field value descriptions.
3. Choose .

***Table 23–2 Payment Rules for Quotes***

| Field | Description |
|---|---|
| Validate Charge Name | Check this box to indicate that the system is to check that the charge names used for a quote document are valid before proceeding with payment collection. |
| Charge Name for Shipping | Select the charge name that represents the shipping charge on a quote, as described in Section 23.2.1, "Creating a Charge Category". |

# 23.5 Defining Receiving Discrepancy Reasons

You can define codes to specify reasons for any discrepancies that may occur during a receipt of a shipment or a return.

There are three types of receiving discrepancies:

- Over Receipt - Occurs when a receiving node receives additional quantity compared to the expected quantity.
- Under Receipt - Occurs when a receiving node receives less than the expected quantity for the receipt.
- Damaged Receipt - Occurs when the receiving disposition code indicates that a damaged product has been received.

**Note:** A given discrepancy type can have multiple reason codes defined for it. For example, if a shipment is received with a quantity of 10 under the expected receiving quantity, it is possible for the under receipt discrepancy to have two different reasons for the receipt, such as 6 units SHORT_SHIPMENT and 4 units CARRIER_FAULT.

You can use the Receiving Discrepancy Reasons branch for:

- Creating a Receiving Discrepancy Reason
- Modifying a Receiving Discrepancy Reason
- Deleting a Receiving Discrepancy Reason

## 23.5.1 Creating a Receiving Discrepancy Reason

To create a receiving discrepancy reason:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Receipt > Receiving Discrepancy Reasons. The Receiving Discrepancy Reasons window displays in the work area.
2. Choose . The Receiving Discrepancy Reason Details pop-up window displays.
3. Enter information into the applicable fields. Refer to Table 23–3 for field value descriptions.
4. Choose .

***Table 23–3 Receiving Discrepancy Reason Details***

| Field | Description |
|---|---|
| Discrepancy Reason Code | Enter the name of the discrepancy reason code as you want it to appear throughout the system. |
| Discrepancy Reason Description | Enter a brief description of the reason discrepancy. |
| Discrepancy Reference | Enter any additional reference information according to your business practices. |
| Discrepancy Type Group | |
| Over Receipt | Select Over Receipt if you want the discrepancy reason to identify scenarios in which a receiving node receives more than the expected quantity. |
| Under Receipt | Select Under Receipt if you want the discrepancy reason to identify scenarios in which a receiving node receives less than the expected quantity. |
| Damaged Receipt | Select Damaged Receipt to identify scenarios in which a receiving node receives items with a receiving disposition identifying them as damaged. |

***Table 23–3 Receiving Discrepancy Reason Details***

| Field | Description |
|---|---|
| Requires Invoice Adjustment | Select Requires Invoice Adjustment if a monetary adjustment must be made when a receipt discrepancy is associated with this discrepancy reason. |
| Invoice Adjustment Type Group | |
| Credit | If you selected Requires Invoice Adjustment, select Credit if the adjustment amount results in a credit invoice. |
| Debit | If you selected Requires Invoice Adjustment, select Debit if the adjustment amount results in a debit invoice. |
| Invoice Line Reference | If you selected Requires Invoice Adjustment, enter a name for the adjustment. This reference value is used in instances when multiple adjustment invoices are created for the same order line, in which case they are split into different invoice lines if they have different invoice line references. |

## 23.5.2 Modifying a Receiving Discrepancy Reason

To modify a receiving discrepancy reason:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Receipt > Receiving Discrepancy Reasons. The Receiving Discrepancy Reasons window displays in the work area.
2. Select the receiving discrepancy reason and choose . The Receiving Discrepancy Reason Details pop-up window displays.
3. Enter information into the applicable fields. Refer to Table 23–3 for field value descriptions.
4. Choose .

## 23.5.3 Deleting a Receiving Discrepancy Reason

To delete a receiving discrepancy reason:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Receipt > Receiving Discrepancy Reasons. The Receiving Discrepancy Reasons window displays in the work area.
2. Select the receiving discrepancy reason and choose ✕.

# 24

# Configuring a Document's Purge Criteria

**Purge Criteria** business rules are used to define qualifications around each type of purge. **Purges** are the process by which old data is removed from the system database. Purges minimize the number of unused database records to increase search efficiency and reduce the size of the required physical disk. In Purge Criteria Rules, default purge rules are provided. These can be modified for your system operations.

Table 24–1 lists the purge rules provided for order document types in Selling and Fulfillment Foundation.

***Table 24–1 Order Document Type Purge Rules***

| Rule | Description | Default Retention Days |
|---|---|---|
| PRG_SHIP_STATS | Purges shipment statistics and archives them in the history tables. | 30 |
| STATUSAUDITPRG | Purges order age alerts (if you have configured the system to trigger alerts when the order document type stays in a particular status for a specified time period). | 30 |
| NEGOTIATIONPRG | Purges negotiation information and archives it in the history tables. | 30 |
| NEGOTIATIONHISTPRG | Purges negotiation information from the negotiation history tables. | 30 |

*Table 24–1 Order Document Type Purge Rules*

| Rule | Description | Default Retention Days |
|---|---|---|
| RECEIPTPRG | Purges receipt information and archives it in the history tables. | 30 |
| RECEIPTHISTPRG | Purges receipt information from the receipt history tables. | 30 |
| ORDERHISTPRG | Purges order information from the order history tables. | 30 |
| ORDERPRG | Purges order information and archives it in the history tables. | 30 |
| ORDER_RELEASE_STATUS_ PURGE | Purges order release status records with a quantity of 0. | 30 |
| PICKLISTPRG | Purges pick list information. | 30 |
| SHIPMENTHISTPRG | Purges shipment information from the shipment history tables. | 30 |
| SHIPMENTPRG | Purges shipment information and archives it in the history tables. | 30 |
| DRAFTORDERNOLINEPRG | Purges draft orders that do not have any order lines. | 30 |
| DRAFTORDERNOLINEHISTPRG | Purges draft orders without any order lines from the history table. | 30 |
| DRAFTORDERHISTPRG | Purges draft order information from the draft order history tables. | 30 |
| DRAFTORDERPRG | Purges draft order information and archives it in the history tables. | 30 |

Table 24–2 lists the purge rules provided for the opportunity document type in Selling and Fulfillment Foundation.

***Table 24–2 Opportunity Document Type Purge Rules***

| Rule | Description | Default Retention Days |
|---|---|---|
| OPPORTUNITYPRG | Purges opportunity information and archives it in the history tables. | 30 |
| OPPORTUNITYHISTPRG | Purges opportunity information from the opportunity history tables. | 30 |

## 24.1 Modifying an Order Document Type's Purge Criteria Rule

To modify an order document type's purge criteria rule:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Purge Criteria. The Purge Criteria List window displays in the work area.
2. Enter information in the applicable fields. Refer to Table 24–3, "Purge Criteria Details Pop-up Window" for field value descriptions.
3. Choose .

***Table 24–3 Purge Criteria Details Pop-up Window***

| Field | Description |
|---|---|
| Purge Code | Identifies a purge program. This is a system defined code. |
| Description | Describes the type of purge. |
| Rollback Segment | Defines the rollback segment that should be explicitly used for the purge transaction qualified by the purge code. This is useful when there are huge logical data sets that have to be purged. This is optional and used for order related purges. |
| Retention Days | Enter the number of days the data is to be retained in the database (going backwards from the time the program runs). Make sure that your table size takes into account the number of retention days entered here. |
| Write to Log File | Check this box if you want purged data written to a log file. The log file can be backed up and used as a journal at a later date. |
| Log File Name | Enter a log file name. The log file is created in the directory specified in the `yfs.purge.path` property. If this is not passed, it defaults to the value specified in the `yfs.properties` file. If a variable is introduced, then the `yfs.purge.path` is ignored.<br><br>To override this property, add an entry for it in the `<INSTALL_DIR>/properties/customer_overrides.properties` file. For additional information about overriding properties using the `customer_overrides.properties` file, see the *Selling and Fulfillment Foundation: Properties Guide*.<br><br>For more information about using variables for the log file directory, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br><br>For information about filename limitations related to internationalization, see the *Selling and Fulfillment Foundation: Localization Guide*. |

***Table 24–3 Purge Criteria Details Pop-up Window***

| Field | Description |
|---|---|
| **Additional Purge Criteria**<br>These parameters are used to override the order history purge retention days. This override is configured based on the line types within each order defined at the enterprise and document type levels.<br>**Note:** These additional parameters can be defined only for order history purge (ORDHISTPRG) criteria. | |
| Line Type | Select the line types from the drop-down list. For more information about defining line types, see the appropriate section in this guide. |
| Additional Retention Days | Enter the additional number of days (apart from the retention days specified by the order history purge) the data is to be retained in the database. Make sure that your table size takes into account the number of retention days entered here.<br>**Note:** To be considered for additional retention days, the order line must have at least some quantity that is not cancelled or shorted. |

**Note:** The history purge date cannot be reset when you restore the order after it was purged. For example, if an order is purged with a history purge date of 20070801 and when the order is restored in the year 2006, the history purge date still remains as 20070801.

The following example provides an use-case of the line type purge in an order placement scenario:

***Example 24–1 Line Type Purge***

An order is placed with the following 4 order lines:

- Order Line 1 - Television
- Order Line 2 - 2 year Television service plan with Line Type as 2YR_ WARRANTY. Therefore, the additional retention days are 721.
- Order Line 3 - Stereo

- Order Line 4 - 4 year Stereo service plan with Line Type as 4YR_ WARRANTY. Therefore, the additional retention days are 1451.

Assume that the order is set to be purged after 30 days. On day 1, the order moves into a purgeable status. On day 30, the order is purged to the history table. The purge history date is set as:

Today + 10 + Maximum(721, 1491) = 1491 days, where 10 is the number of retention days for the history purge.

On day 40, the history purge agent does not pick up this order to purge, since the purge history date is set. Rather, the order is purged from the history on day 1491.

# 25

# Configuring Value-Added Services

Enterprises provide services along with the products they sell to their customers. Some examples of services provided include:

- Annual maintenance contract.
- Installing a customer's home theater system.
- Installing software on a new computer, and configuring the computer to work on a home network.

These services are either fulfilled by the enterprise, or by third-party service providers who have a relationship with the enterprise to provide such services.

Use Value Added Services for:

- Defining Value-Added Services Modification Reasons
- Defining Value-Added Services Cancellation Reasons
- Defining Value-Added Services Appointment Failure Reasons
- Defining Value-Added Services Note Reasons
- Defining Value-Added Services Instruction Types
- Defining Value-Added Services Rules
- Defining Value-Added Services Modification Rules
- Defining Value-Added Services Hold Types
- Defining Value-Added Services Process Types
- Defining Value-Added Services Process Model

- Defining Value-Added Services Monitoring
- Viewing Value-Added Services Purge Criteria

# 25.1 Defining Value-Added Services Modification Reasons

You can define reason codes for modifications. These codes define why modification was made by a user in the Application Consoles.

You can use the Modification Reasons branch for:

- Creating a Modification Reason
- Modifying a Modification Reason
- Deleting a Modification Reason

## 25.1.1 Creating a Modification Reason

To create a modification reason:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > Modification Reasons. The Modification Reasons window displays in the work area.
3. Choose . The Modification Reason Details window displays.

4. In Modification Reason, enter the modification reason as you want it to appear throughout the system.
5. In Short Description, enter a brief description of the modification reason.

6. In Long Description, enter a more detailed description of the modification reason.
7. Choose .

## 25.1.2 Modifying a Modification Reason

To modify a modification reason:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > Modification Reasons. The Modification Reasons window displays in the work area.
3. Select the applicable modification reason and choose . The Modification Reason Details window displays.
4. In Short Description, enter a brief description of the modification reason.
5. In Long Description, enter a more detailed description of the modification reason.
6. Choose .

## 25.1.3 Creating a New Modification Reason Based on an Existing One

To create a new modification reason based on an existing one:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > Modification Reasons. The Modification Reasons window displays in the work area.
3. Select the applicable modification reason and choose . The Modification Reason Details window displays.
4. Enter information in the applicable fields.
5. Choose .

### 25.1.4 Deleting a Modification Reason

To delete a modification reason:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > Modification Reasons. The Modification Reasons window displays in the work area.
3. Select the applicable modification reason and choose . The Confirmation window displays.
4. Choose OK.

## 25.2 Defining Value-Added Services Cancellation Reasons

You can define reason codes for cancellation. These codes define why cancellation was made by a user in the Application Consoles.

You can use the Cancellation Reasons branch for:

- Creating a Cancellation Reason
- Modifying a Cancellation Reason
- Deleting a Cancellation Reason

### 25.2.1 Creating a Cancellation Reason

To create a cancellation reason:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > Cancellation Reasons. The Cancellation Reasons window displays in the work area.
3. Choose . The Cancellation Reason Details window displays.

4. In Cancellation Reason, enter the cancellation reason as you want it to appear throughout the system.
5. In Short Description, enter a brief description of the cancellation reason.
6. In Long Description, enter a more detailed description of the cancellation reason.
7. Choose .

## 25.2.2 Modifying a Cancellation Reason

To modify a cancellation reason:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > Cancellation Reasons. The Cancellation Reasons window displays in the work area.
3. Select the applicable cancellation reason and choose . The Cancellation Reason Details window displays.
4. In Short Description, enter a brief description of the cancellation reason.

5. In Long Description, enter a more detailed description of the cancellation reason.
6. Choose .

## 25.2.3 Creating a New Cancellation Reason Based on an Existing One

To create a new cancellation reason based on an existing one:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > Cancellation Reasons. The Cancellation Reasons window displays in the work area.
3. Select the applicable cancellation reason and choose . The Cancellation Reason Details window displays.
4. Enter information in the applicable fields.
5. Choose .

## 25.2.4 Deleting a Cancellation Reason

To delete a cancellation reason:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > Cancellation Reasons. The Cancellation Reasons window displays in the work area.
3. Select the applicable cancellation reason and choose . The Confirmation window displays.
4. Choose OK.

# 25.3 Defining Value-Added Services Appointment Failure Reasons

You can define reason codes for appointment failures. These codes define why an appointment was failed by a user in the Application Consoles.

You can use the Appointment Failure Reasons branch for:

- Creating a Appointment Failure Reason
- Modifying an Appointment Failure Reason
- Deleting an Appointment Failure Reason

## 25.3.1 Creating a Appointment Failure Reason

To create a appointment failure reason:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > Appointment Failure Reasons. The Appointment Failure Reasons window displays in the work area.
3. Choose . The Appointment Failure Reason Details window displays.

4. In Appointment Failure Reason, enter the failure reason as you want it to appear throughout the system.
5. In Short Description, enter a brief description of the appointment failure reason.
6. In Long Description, enter a more detailed description of the appointment failure reason.
7. Choose .

## 25.3.2 Modifying an Appointment Failure Reason

To modify a Appointment Failure reason:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > Appointment Failure Reasons. The Appointment Failure Reasons window displays in the work area.
3. Select the applicable appointment failure reason and choose . The Appointment Failure Reason Details window displays.
4. In Short Description, enter a brief description of the appointment failure reason.
5. In Long Description, enter a more detailed description of the appointment failure reason.
6. Choose .

## 25.3.3 Creating a New Appointment Failure Reason Based on an Existing One

To create a new Appointment Failure reason based on an existing one:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > Appointment Failure Reasons. The Appointment Failure Reasons window displays in the work area.
3. Select the applicable appointment failure reason and choose . The Appointment Failure Reason Details window displays.
4. Enter information in the applicable fields.
5. Choose .

### 25.3.4 Deleting an Appointment Failure Reason

To delete a Appointment Failure reason:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > Appointment Failure Reasons. The Appointment Failure Reasons window displays in the work area.
3. Select the applicable appointment failure reason and choose . The Confirmation window displays.
4. Choose OK.

## 25.4 Defining Value-Added Services Note Reasons

You can define reason codes for entering a note. These codes define why a note was entered by a user in the Console.

You can use the Note Reasons branch for:

- Creating a Note Reason
- Modifying a Note Reason
- Deleting a Note Reason

### 25.4.1 Creating a Note Reason

To create a note reason:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > Note Reasons. The Note Reasons window displays in the work area.
3. Choose . The Note Reason Details window displays.

4. In Note Reason, enter the note reason as you want it to appear throughout the system.
5. In Short Description, enter a brief description of the note reason.
6. In Long Description, enter a more detailed description of the note reason.
7. Choose .

## 25.4.2 Modifying a Note Reason

To modify a note reason:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > Note Reasons. The Note Reasons window displays in the work area.
3. Select the applicable appointment failure reason and choose . The Note Reason Details window displays.
4. In Short Description, enter a brief description of the note reason.
5. In Long Description, enter a more detailed description of the note reason.
6. Choose .

### 25.4.3 Creating a New Note Reason Based on an Existing One

To create a new note reason based on an existing one:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > Note Reasons. The Note Reasons window displays in the work area.
3. Select the applicable note reason and choose . The Note Reason Details window displays.
4. Enter information in the applicable fields.
5. Choose .

### 25.4.4 Deleting a Note Reason

To delete a note reason:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > Note Reasons. The Note Reasons window displays in the work area.
3. Select the applicable appointment failure reason and choose . The Confirmation window displays.
4. Choose OK.

## 25.5 Defining Value-Added Services Instruction Types

You can define the common codes used when adding special instructions to an work order document.

You can use the Instruction Types branch for:

- Creating an Instruction Type
- Modifying an Instruction Type

- Deleting an Instruction Type

## 25.5.1 Creating an Instruction Type

To create an instruction type:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > Instruction Types. The Instruction Types window displays in the work area. Choose . The Instruction Type Details pop-up window displays.

3. In Instruction Type, enter the instruction type.
4. In Short Description, enter a brief description of the instruction type.
5. In Long Description, enter a more detailed description of the instruction type.
6. Choose .

## 25.5.2 Modifying an Instruction Type

To modify an instruction type:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > Instruction Types. The Instruction Types window displays in the work

area. Choose . The Instruction Type Details pop-up window displays.

3. Select the applicable instruction type and choose . The Instruction Type Details pop-up window displays.
4. In Short Description, enter a brief description of the instruction type.
5. In Long Description, enter a more detailed description of the instruction type.
6. Choose .

### 25.5.3 Deleting an Instruction Type

To delete an instruction type:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > Instruction Types. The Instruction Types window displays in the work area. Choose . The Instruction Type Details pop-up window displays.
3. Select the applicable instruction type and choose .

## 25.6 Defining Value-Added Services Rules

Pre-calling a customer is required for appointments that are made for distant dates. You can make a pre-calls closer to the service date, to confirm the appointment from the customer.

### 25.6.1 Setting Up Value-Added Services Pre-Call Rules

To set up Value-Added Services pre-call rules:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > VAS Process > VAS Rules. The VAS Rules Details window displays in the work area.

3. Select the appropriate condition for which you need to make a pre-call. The pre-call status on work order is determined based on the selected condition. For more information about the pre-call statuses, see the *Selling and Fulfillment Foundation: Javadocs*.
4. Enter how many days in advance you need to make a pre-call closer to the appointment date.
5. Choose .

## 25.6.2 Setting Up Value-Added Services Other Rules

To set up Value-Added Services other rules:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > VAS Process > VAS Rules. The VAS Rules Details window displays in the work area.

3. Enter how many hours in advance you need to consolidate product lines to the work order before the appointment date. A lead time zero (0) is equivalent to 12 a.m. the next day and excludes all work orders whose first appointment is on the current date. Negative numbers can be entered in this field to apply the rule to the current date. For example, -24 corresponds to 12 a.m. of the current date. -12 corresponds to 12 p.m. (noon) of the current date.

4. Check the box in the Automatically remove association between product and delivery service lines field if you want the system to automatically remove the association between product and delivery service lines in a work order.

> **Note:** However, even if the Automatically remove association between product and delivery service lines is selected, the association will be removed only when the corresponding product line or delivery service line is removed from the work order.
>
> If the product line is removed from the work order, the association to the corresponding delivery service will also be removed.
>
> If the delivery service line is removed from the work order, the associations to all the product lines that are associated with the delivery service line will be removed.

5. Select the Allow appointment date change to an earlier date after schedule check box if you want to reschedule an appointment for a

product line that requires delivery and that has already been scheduled after taking an appointment, to an earlier date.

6. Choose .

## 25.7 Defining Value-Added Services Modification Rules

You can configure the rules and components used when determining what parts of value-added services can be modified as well as when in the value-added services lifecycle the modifications can be performed.

Most work order document types flow through a pipeline without requiring any intervention by a customer service representative. However, there are times when modifications are required, such as modifying appointments. Selling and Fulfillment Foundation supports modification through the Selling and Fulfillment Foundation Consoles and APIs. It is critical to decide which modifications are allowed for each modification type, modification level, and status combination.

**Important:** Contemplate business and system integration implications before allowing a modification that is disallowed as part of the system defaults.

### 25.7.1 Setting Up Value-Added Services Modification Rules

You can group modifications in the Modification Rules window by modification type, modification level, or status, by selecting the corresponding grouping from Group By. The Modification Rules window then displays the grouping you have chosen in a hierarchical structure.

To set up Value-Added Services modification rules:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > VAS Process > VAS Modification Rules. The Modification Rules window displays in the work area.

3. Expand the applicable modification types and levels for which you want to set up rules.
4. Select the Value-Added Services process whose Modification Rule is to be set, and choose any of the following option as per your business practices:
   - to allow modification
   - to disallow modification
   - to ignore modification
5. Refer to the following table for settings definition you can apply to modifications:

***Table 25–1 Value-Added Services Rule Modifications***

| Field | Description |
|---|---|
| Allow | Indicates whether or not modifications may be made at this modification level and type for the specified status. |
| Disallow | Indicates that no modifications may be made at this modification level and type for the specified status. |

***Table 25–1 Value-Added Services Rule Modifications***

| Field | Description |
|---|---|
| Ignore | Indicates that modifications are ignored at this modification level and type for the specified status. |
| There are several scenarios to consider for the Allow, Disallow, and Ignore settings:<br>• If one line is in status 1 and another line is in status 2 - and both statuses are set to Allow, the modification is allowed.<br>• If one line is in status 1, another line is in status 2, and another is in status 3 - and the 1 and 2 statuses are set to Allow, but the 3 status is set to Disallow, all modifications are disallowed, because one of the currently applied statuses is disallowed.<br>• If one line is in status 1 and one is in the extended status 2 - If the 1 status is set to Allow, but the extended status is set to Ignore (all extended statuses are defaulted to ignore, so that they pick up their base status settings unless you have explicitly overridden the setting) then all modifications are allowed only if the base status is set to allow. If the base status is set to disallow, then all modifications are disallowed. | |

# 25.8 Defining Value-Added Services Hold Types

Work orders can be placed on hold manually or automatically, by applying a particular hold type. Certain transactions can be configured to not process documents that are on a given hold. Likewise, modification types can be configured to not process documents that are on a given hold. By default, all transactions and modification types are allowed to process all documents for all hold types.

The transactions that can be prevented from processing work orders on a given hold type have the checkbox `This Transaction Can Be Stopped From Processing Orders That Are On Hold` checked in the `Others` tab of the transaction details. For more information about viewing transaction details, refer to the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

You can use the Hold Types branch for:

- Creating a Hold Type
- Modifying a Hold Type

- Deleting a Hold Type

## 25.8.1 Creating a Hold Type

To create a hold type:

1. From the tree in the application rules side panel, choose VAS > VAS Process > Hold Types. The Hold Types window displays in the work area.
2. Click . The Hold Type pop-up window displays. The type of this hold in the Hold Type field, and its description in the Description field. Enter the rest of the information in the applicable fields. Refer to Table 25–2, Table 25–3 and Table 25–4 for field value descriptions.
3. Click .

***Table 25–2 Hold Type window, Hold Creation tab***

| Field | Description |
|---|---|
| **Hold Created Automatically** | |
| On Work Order Creation | Check this to apply this hold type to all work orders on work order creation. |

***Table 25–2 Hold Type window, Hold Creation tab***

| Field | Description |
|---|---|
| On Resolution Of Hold Type | Check this to apply this hold type on resolution of another hold type. Select from the drop-down list the hold type that, upon resolution, triggers this hold type.<br><br>**Note**: Selling and Fulfillment Foundation does not check whether or not you are defining a circular hold type definition. For example, if you define hold type B as being applied on resolution of hold type A, and hold type A as being applied on resolution of hold type B, you could create an infinite loop that Selling and Fulfillment Foundation does not warn you against. |
| When The Following Modifications Are Performed | Modification types that automatically apply this hold type to a work order.<br><br>Click to modify the list. In the subsequent pop-up window:<br>• Use the right arrow to move the available modification types that you wish to associate with this hold type to the subscribed list.<br>• Use the left arrow to unsubscribe the modification types that you wish to disassociate with this hold type and move them back into the available list. |
| For All Work Orders | Select this radio button if the above conditions should be checked for all work orders.<br><br>**Note**: This option is only selectable once the created hold has been saved. |
| Only For Work Orders Satisfying Following Condition | Select this radio button if the above conditions should only be checked for work orders satisfying a certain condition. Click to build or modify the condition for evaluation. For more information about using the condition builder, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.<br><br>The available attributes for this condition can be extended. For more information, refer to the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br><br>**Note**: This option is only selectable once the created hold has been saved. |
| **Hold Created Manually** | |

***Table 25–2 Hold Type window, Hold Creation tab***

| Field | Description |
|---|---|
| By All Users | Select this radio button if all user groups can apply this hold to a work order. |
| By Users Who Belong To The Following User Groups | Select this radio button if only users belonging to certain user groups may apply this hold to a work order.<br><br>Click to modify the list. In the subsequent pop-up window:<br>• Use the right arrow to move the available user groups that you wish to associate with this hold type to the subscribed list.<br>• Use the left arrow to unsubscribe the user groups that you wish to disassociate with this hold type and move them back into the available list. |

***Table 25–3 Hold Type window, Hold Resolution tab***

| Field | Description |
|---|---|
| **Hold Resolved Automatically** | |
| The Following Time-Triggered Transaction Will Process Created Holds | From the drop-down list, select the time-triggered transaction that will process created holds. |
| The Following Time-Triggered Transaction Will Process Rejected Holds | from the drop-down list, select the time-triggered transaction that will process rejected holds. |
| **Hold Resolved Manually** | |

***Table 25–3 Hold Type window, Hold Resolution tab***

| Field | Description |
|---|---|
| By All Users | Select this radio butting if all user groups may process this hold. |
| By All Users Who Belong To The Following Groups | Select this radio button if only users belonging to certain user groups may process this hold.<br><br>Click to modify the list. In the subsequent pop-up window:<br>• Use the right arrow to move the available user groups that you wish to associate with this hold type to the subscribed list.<br>• Use the left arrow to unsubscribe the user groups that you wish to disassociate with this hold type and move them back into the available list. |

***Table 25–4 Hold Type window, Hold Effects tab***

| Fields | Description |
|---|---|
| The Following Transactions Will Be Stopped From Processing Work Orders | Transactions that are disallowed when this hold type is applied to a work order.<br><br>Click to modify the list. In the subsequent pop-up window:<br>• Use the right arrow to move the available modification types that you wish to associate with this hold type to the subscribed list.<br>Use the left arrow to unsubscribe the modification types that you wish to disassociate with this hold type and move them back into the available list. |
| The Following Modifications Are Not Allowed For Work Orders On This Hold | Modification types are disallowed when this hold type is applied to a work order.<br><br>Click to modify the list. In the subsequent pop-up window:<br>• Use the right arrow to move the available transactions that you wish to associate with this hold type to the subscribed list.<br>Use the left arrow to unsubscribe transactions that you wish to disassociate with this hold type and move them back into the available list. |

## 25.8.2 Modifying a Hold Type

1. From the tree in the application rules side panel, choose VAS > VAS Process > Hold Types. The Hold Types window displays in the work area.
2. Select the applicable hold type and click . The Hold Type pop-up window displays. Enter information in the applicable fields. Refer to Table 25–2, Table 25–3 and Table 25–4 for field value descriptions.
3. Click .

### 25.8.3 Deleting a Hold Type

1. From the tree in the application rules side panel, choose VAS > VAS Process > Hold Types. The Hold Types window displays in the work area.
2. Select the applicable hold type and click ✕.

## 25.9 Defining Value-Added Services Process Types

Value Added Services Process Type Details define parameters and templates that distinguish a process type.

A process type pipeline is a series of transactions and statuses that guide document types, such as a Value Added Services execution, through a predefined process. You can also set up transactions consisting of events, actions, and conditions, as they pertain to the pipeline you are configuring.

VAS Repositories

A value-added services repository is a logical collection of entities that define the business process workflow.

The following entities are included in a repository:

- Pipelines
- Transactions
- Statuses
- Conditions
- Actions
- Service Definitions

### 25.9.1 Viewing Value-Added Services Process Type Details

To view Value-Added Services process type details:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.

2. From the Distributed Order Management tree, choose VAS > VAS Process > VAS Process Type Details. The Process Type Details window displays in the work area.

3. In Process Type, VAS is automatically populated by the system.
4. In Process Type Name, the name of the process type displays, which is editable.
5. In Description, a brief description of the process type displays, which is editable.

# 25.10 Defining Value-Added Services Process Model

The Value-Added Services process is modeled through a pipeline. This represents the process configuration that is unique to an enterprise. For example, installing Television at the customer's site.

## 25.10.1 Pipeline Determination

Pipeline determination is used to set up conditions that affect which pipeline is used during the start of the business process workflow.

### 25.10.1.1 Hub Rule

When you expand the Pipeline Determination branch, the components displayed depends on what role you are logged in as. If you are logged in as a Hub role, the Hub Rule displays. If you are logged in as an Enterprise role, both the Hub Rule and all user created determination rules (For example, My Rule) components display. Double-click on the Standard Work Order Pipeline rule to view the pipeline determination rules.

**Note:** If you are logged in as an Enterprise role, the Hub Rule screen is grayed out and cannot be modified.

Drag conditions and pipelines into the work area to construct pipeline determination rules. A single pipeline or condition must be the root.

Conditions cannot link back to an earlier component in the chain and a pipeline cannot be linked to twice.

**Note:** When configuring pipeline determination for an order document type pipeline, please note that pipeline determination is only considered when adding a line or creating an order. When changes are made to draft orders pipeline determination does not occur.

#### 25.10.1.2 Condition Variables for Pipeline Determination

When using conditions for pipeline determination, the following condition variables can be used:

- Enterprise Code
- Node
- Provider Organization
- Service Item ID

### 25.10.2 Pipelines

To view Value-Added Services pipeline details:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > VAS Process > VAS Process Model > Pipelines > Standard Work Order Pipeline. The Pipeline Detail: Standard Work Order Pipeline (VAS Process) window displays in the work area.

For more information about creating, modifying, deleting, and monitoring rules, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

## 25.10.3 Transactions

Every process type has a set of base transactions defined for it. A transaction is a logical unit of work that is necessary for performing activity within Selling and Fulfillment Foundation. Base transactions are predefined transactions that contain information about how the

transaction behaves, such as how many copies of a transaction can be kept in a process type and whether or not it can have configurable base pick and drop statuses. Base transactions can be used to create new transactions. These transactions can be changed within the limits defined in the base transaction.

To view the transaction details of Value-Added Services pipeline:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > VAS Process > VAS Process Models.
3. In the VAS window, choose . The Transactions tab window displays.

For more information about creating, modifying, or deleting transactions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

*Table 25–5 Transactions Tab Window*

| Field | Description |
|---|---|
| Allocate Work Order | This transaction indicates the allocation of a work order created for VAS. |
| Cancel Work Order | This transaction indicates the cancellation of a work order created for VAS. |
| Change Work Order Status | This transaction indicates the change in status of a work order created for VAS. |
| Confirm Work Order | This transaction indicates that the work order needs to be confirmed for VAS. |
| Create Work Order | This transaction indicates creation of a work order for VAS. |
| Modify Work Order | This transaction indicates the modification of a work order for VAS. |
| Purge Work Order | This transaction indicates the purge of work orders created for VAS. |
| Purge Work Order History | This transaction indicates the purge of the work order history for VAS. |
| Release Work Order | The transaction indicates the release of a work order created for VAS. |
| Synchronize Task Queue | The transaction indicates synchronization of task queue for work orders created for VAS. |
| Work Order Monitor | This transaction indicates monitoring of work orders created for VAS. |

## 25.10.4 Statuses

Statuses are the actual states that a document moves through in the pipeline. A transaction can contain two types of statuses, a drop status and a pickup status. A document is moved into a drop status when the events and conditions of a transaction have been completed. A pickup status takes the document from the previous drop status and moves it through the next transaction.

To view the status details of a Value-Added Services pipeline:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.

2. From the Distributed Order Management tree, choose VAS > VAS Process > VAS Process Models.
3. In the VAS window, choose . The Statuses tab window displays.

For more information about creating, modifying, or deleting statuses, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

***Table 25–6 Statuses Tab Window***

| Field | Description |
|---|---|
| Work Order Created | This indicates that a work order is created.<br>This corresponds to the first step of the 'Create Work Order' transaction. |

*Table 25–6 Statuses Tab Window*

| Field | Description |
|---|---|
| Work Order Completed | This indicates that a work order is complete.<br>This corresponds to the 'Confirm Work Order' transaction. |
| Work Order Cancelled | This indicates cancellation of a work order.<br>This corresponds to the 'Cancel Work Order' transaction. |

## 25.10.5 Conditions

A condition matches document type attributes against decision points and routes the documents to different paths based on the specified attribute and value combinations. The document type attributes against which conditions can be created are predefined in Selling and Fulfillment Foundation. You can use these attributes in any combination or you can create conditions that run the appropriate application logic for specific circumstances.

To view the condition details of a Value-Added Services pipeline:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > VAS Process > VAS Process Models.
3. In the VAS window, choose . The Conditions tab window displays.

For more information about creating, modifying, or deleting conditions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

***Table 25–7 Conditions Tab Window***

| Field | Description |
|---|---|
| Pre-Call | This indicates the pre-call conditions specific to VAS pipeline. |
| Service Status | This indicates the service status conditions specific to VAS pipeline. |

## 25.10.6 Actions

An action is a process or program that is triggered by an event. These processes and programs send user alert notifications and automatically resolve issues.

For example, when the service is completed, you can set an action to send the customer an e-mail.

To view the action details of a Value-Added Services pipeline:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > VAS Process > VAS Process Models.
3. In the VAS window, choose . The Actions tab window displays.

For more information about creating, modifying, or deleting actions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

***Table 25–8 Actions Tab Window***

| Field | Description |
|---|---|
| Templates | Default settings are provided for:<br>**Publish Data**—Sends data to external queue or internal tables.<br>**Raising an Exception**—Raises an alert using the Event Management from the published information.<br>**Send Email**—Raises an email action utilizing a template to format from the published information.<br>**Send Email-HTML format**—Raises an email action to create an HTML email format from the published information. |

## 25.10.7 Service Definitions

Service definitions are a representation of the logic that regulates document workflow services. The Service Builder is a graphical interface that enables you to create a graphical representation of these services.

To view the service definition details of a Value-Added Services pipeline:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > VAS Process > VAS Process Models.
3. In the VAS window, choose . The Service Definitions tab window displays.

For more information about creating, modifying, or deleting service conditions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

***Table 25–9 Service Conditions Tab Window***

| Field | Description |
|---|---|
| Service Definitions | Displays service definitions that are specific to the VAS pipeline. |

# 25.11 Defining Value-Added Services Monitoring

Use Value-Added Services Monitoring to view Date Types and configure Monitoring Events.

## 25.11.1 Viewing Value-Added Services Date Types

You can view Value-Added Services date types.

To view date types:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.

2. From the Distributed Order Management tree, choose VAS > VAS Process > VAS Monitoring. The Monitoring: Work Order window displays. Choose the Date Types tab.

***Table 25–10 Monitoring: Work Order - Date Types***

| Field | Description |
|---|---|
| Date Type | The name of VAS date type. |
| Description | The date type description. |
| Requested | Indicates if the date type is requested by a user. |
| Expected | Indicates if the date type represents a date the system expects or has calculated something to occur. |
| Actual | Indicate if the date type represents the actual date. |

## 25.11.2 Defining Value-Added Services Event Monitoring

Events are used in instances where the Work Order Monitor may raise multiple alerts of the same type. For example, for a work order if the pre-call status is pending, and you have configured the Work Order Monitor to raise alerts and if the pre-call confirmation is delayed, an alert would be raised against the work order. You can create rules to aggregate all of these similar alerts and raise one "root cause".

You can use the Event Monitoring tab for:

- Creating an Event Rule
- Modifying an Event
- Creating a New Event
- Deleting an Event

***Table 25–11 View Events***

| Field | Description |
|---|---|
| Event ID | The event ID. |
| Description | A brief description of the event. |

### 25.11.2.1 Creating an Event Rule

To create an event rule:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > VAS Process > VAS Monitoring. The Monitoring: Work Order window displays. Choose the Monitor Events tab.
3. In the Monitor Events list window, choose . The Monitor Event Details pop-up window displays.

*Figure 25–1 Monitor Event Details*

4. Enter information in the applicable fields. Refer to Table 25–12 for field value descriptions.
5. Choose .

*Table 25–12 Event Monitoring*

| Field | Description |
|---|---|
| Event ID | The event ID. |
| Description | A brief description of the event. |
| Requires Realert | Check this box if you want the users to be re-alerted if the issue has not been resolved within a certain timeframe. |
| Realert Interval | If you have selected Requires Realert, enter the interval (in hours) that re-alerts should be sent. |
| Automatically Resolve Alerts | This flag must be checked to trigger a monitor event every time an alert condition is detected on an order. To trigger an alert only once when the alert condition is met, uncheck this flag. |

*Table 25–12 Event Monitoring*

| Field | Description |
|---|---|
| Event Identified By | |
| Work Order | Select this field if you want two or more alert conditions to be treated the same, belonging to the same work order. |
| Service To Be Invoked | Select the service to be invoked, whenever the event is raised. |
| Aggregate And Invoke Service For | |
| Work Order | Select this field if you want only one alert to be raised for a work order when alert conditions are detected. |

### 25.11.2.2 Modifying an Event

To modify an event rule:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > VAS Process > VAS Monitoring. The Monitoring: Work Order window displays. Choose the Monitor Events tab.
3. In the Monitor Events window, choose . The Monitor Event Details window displays.
4. Enter information in the applicable fields. Refer to Table 25–12 for field value descriptions.
5. Choose .

### 25.11.2.3 Creating a New Event

To create a new event rule:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > VAS Process > VAS Monitoring. The Monitoring: Work Order window displays. Choose the Monitor Events tab.

3. In the Monitor Events window, choose . The Monitor Event Details window displays.
4. Choose .

### 25.11.2.4 Deleting an Event

To delete an event:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > VAS Process > VAS Monitoring. The Monitoring: Work Order window displays. Choose the Monitor Events tab.
3. In the Monitor Events window, choose . The Confirmation window displays.
4. Choose OK.

## 25.12 Viewing Value-Added Services Purge Criteria

Transactional data collected by Selling and Fulfillment Foundation during the execution are periodically removed from the 'live' transactional tables. It is common to retain work order related information for extended period of time. There are history tables provided for relevant transactional tables to move data from the day-to-day 'live' tables to a historical table. Purges are the process by which old data is removed from the system database. Purges minimize the number of unused database records to increase search efficiency and reduce the size of the required physical disk.

To view purge criteria:

1. From the menu bar, choose Applications > Distributed Order Management. The Distributed Order Management tree displays in the side panel.
2. From the Distributed Order Management tree, choose VAS > VAS Process > Purge Criteria. The Purge Criteria List window displays.

***Table 25–13 Purge Criteria***

| Field | Description |
|---|---|
| Purge Code | Identifies a purge program. This is a system defined code. |
| Purge Description | A brief description of the purge. |
| Retention Days | Automatically purges the work order information on exceeding the specified retention days. |

# A

# Time-Triggered Transaction Reference

Selling and Fulfillment Foundation provides a collection of time-triggered transactions, which are utilities that perform a variety of individual functions, automatically and at specific time intervals.

Time-triggered transactions perform repetitive actions on a scheduled basis, typically performing database updates, raising events, or calling APIs. One type of transaction, monitors, are designed to watch for processes or circumstances that are out of bounds and then raise alerts. Often, but not always, they retrieve tasks from the task queue or work from the pipeline.

Some transactions enable you to collect statistical data regarding the application's health. This data is collected periodically, using the value specified for the `yantra.statistics.persist.interval` attribute in the `yfs.properties` file. By default, statistics collection set to on. To override this property, add an entry in the `<INSTALL_DIR>/properties/customer_overrides.properties` file. For additional information about overriding properties using the `customer_overrides.properties` file, see the *Selling and Fulfillment Foundation: Properties Guide*.

For more information about statistics persistence, see the *Selling and Fulfillment Foundation: Performance Management Guide*. For more information about the specific statistics parameters used, see the applicable time-triggered transactions.

The time-triggered transactions described in this appendix are unique transactions, that may or may not be document type specific. For document specific transactions, the nomenclature helps define which unique transaction it is based on: a transaction ID is in the format `Unique_Transaction_ID.Document_Type_Code`. For example, the transaction ID for Purge Return is `PURGE.0003`, indicating that it is based on the unique transaction `PURGE`, for document type `0003`, which is

Return Order. Therefore, in order to be able to configure Purge Return, you should look for the PURGE transaction ID in this appendix, which is Order Purge.

Selling and Fulfillment Foundation provides the following types of time-triggered transactions:

- Business Process Time-Triggered Transactions - responsible for processing
- Time-Triggered Purge Transactions - clear out data that may be discarded after having been processed
- Task Queue Syncher Time-Triggered Transactions - update the task queue repository with the latest list of open tasks to be performed by each transaction, based on the latest pipeline configuration.
- Monitors - watch and send alerts for processing delays and exceptions

Selling and Fulfillment Foundation tracks the following statistics for each time-triggered transaction:

- ExecuteMessageCreated - The number of jobs added to the JMS queue in a given time interval.
- ExecuteMessageSuccess - The number of jobs that were run successfully in a given time interval.
- ExecuteMessageError - The number of jobs that failed to run in a given time interval.
- GetJobsProcessed - The number of GetJob messages that were processed in a given time interval.

**Note:** Some of the statistics collected and tracked in Release 9.0 for time-triggered transactions, monitors, and integration and application servers may change with the next release of Selling and Fulfillment Foundation.

# A.1 Running Time-Triggered Transactions

All time-triggered transactions are threadable. This means that you can run multiple instances of a transaction within a single process. For more information about running time-triggered transactions, see the *Selling and Fulfillment Foundation: Installation Guide*. For more information about fine-tuning system performance while running them concurrently, see the *Selling and Fulfillment Foundation: Performance Management Guide*.

## A.1.1 Steps to Complete Before Scheduling Time-Triggered Transactions

Before running and scheduling a time-triggered transaction, ensure that you have completed the following:

1. Configure a JMS Connection Factory to correlate with the QCF name configured for the time-triggered transaction. The Selling and Fulfillment Foundation factory defaults include the `AGENT_QCF` as the JMS Connection Factory. For more information about configuring JMS, see the documentation for your specific application server.
2. Configure JMS Server Destinations to correlate with the group or individual name of the time-triggered transaction. The Selling and Fulfillment Foundation factory defaults include the `DefaultAgentQueue` as the server destination.

   **Note:** Do not put a dot (.) in the name of a JMS Server Destination, for example,'A.0001'. If you do, Selling and Fulfillment Foundation is unable to communicate with it.

3. Using the Applications Manager, configure each time-triggered transaction required for your business process as described in the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*. Each set of time-triggered transaction criteria parameters must ensure the appropriate association of a JMS Agent Server.

# A.2 Configuring Communication Between an Agent and a JMS Server

Setting up communication between an agent (time-triggered transaction) and a remote JMS server requires that you do some prerequisite setup on your JMS system, then do some configuration within the application, which consists of the following procedures:

- If an initial context factory code for your JMS system is not provided with the application, you must create one. See “Create an Initial Context Factory Code” on page 475 for the list of codes that are provided.
- Defining the transaction details – the time-triggered transaction, or agent, must be edited to include connection information for your JMS system and the initial context factory you create. See Section A.2.3, "Define the Transaction Information".

For more information about time-triggered transactions and how they fit into the larger picture of application business process modeling, see the *Configuring Process Models* chapter. Also see the *Configuring Alert Queues* chapter for additional information about queues and agents.

## A.2.1 Prerequisites

Before starting, complete these tasks for your JMS Server. See your JMS Server documentation for more information about performing these tasks.

1. Configure the JMS Queue Connection Factory (QCF) and queues on your JMS server.
2. Configure the JNDI representation of the queues on your JMS server.

   Ensure that you have the following information available from these tasks:

   – JNDI name for each queue

   – JNDI QCF lookup

   – JMS location - the provider URL for the JMS server

Once you have completed the preceding tasks, complete the next two procedures in the order shown. These are both done in the application.

## A.2.2 Create an Initial Context Factory Code

Using an Initial Context Factory (ICF) class enables remote Java clients to connect to your application. This class is provided by the application vendor. The application uses ICF codes to identify these when setting up agents. Initial context factory codes are predefined in the application for the following JMS vendors:

- IBM WebSphere MQ (for MQSeries accessed through a IBM WebSphere Internet Inter-ORB Protocol URL)
- File (for MQSeries accessed through a file URL, as with Oracle WebLogic)
- Oracle WebLogic (for WebLogic JMS)
- JBoss (for JBoss JMS)

If you are using a JMS server that is **not** in the preceding list (for example, ActiveMQ), you must create an initial context factory code for it in the application:

1. Open the Configurator. From the tree in the application rules side panel, choose System Administration > Initial Context Factory Codes. The Initial Context Factory Codes window displays in the work area.
2. Select the + icon to create a new initial context factory code. The Initial Context Factory window is displayed.
3. In the Initial Context Factory field, enter the name of the class provided by your JMS vendor. For example, for ActiveMQ, the class name is org.apache.activemq.jndi.ActiveMQInitialContextFactory.
4. In the Short Description field, enter a descriptive name, up to 40 characters. Make note of this name, because you will use it in the next procedure (see Section A.2.3, "Define the Transaction Information"). For ActiveMQ, enter **ActiveMQ**.
5. In the Long Description field, enter a more detailed description for the initial context factory, up to 100 characters.
6. Save the new initial context factory code and close the window.

For more information about ICFs, see *Creating an Initial Context Factory Code*.

## A.2.3 Define the Transaction Information

For the JMS server to communicate with the application, there must be a time-triggered transaction configured with the JMS server and ICF information.

1. Open the Configurator. From the tree in the application rules side panel, double-click Process Modeling. The Process Modeling window displays in the work area.
2. Select the desired tab, then Base Document Type, then double-click Process Type.
3. Double-click the transaction that corresponds to the agent to be run.
4. Select the Time Triggered tab.
5. Create or select an existing Agent Criteria Definition to edit.
6. The Agent Criteria Details screen is displayed. Select the Runtime Properties tab.
7. Select an existing Agent Server from the list or create your own (recommended).
8. Select an existing Alert Queue from the list or create your own.
9. In the JMS Queue Name field, enter the JNDI name for the queue that you created. See Section A.2.1, "Prerequisites".
10. Enter the desired number of threads the agent should run (recommended not to exceed 5 threads - if more than 5 are needed, start another agent in its own JVM).
11. Select the Initial Context Factory code you created. See Section A.2.2, "Create an Initial Context Factory Code".
12. In the QCF Lookup field, enter the JNDI QCF lookup for the queue that you created (this is the Queue Connection Factory created for the applicable JMS Server). See Section A.2.1, "Prerequisites".
13. Enter the Provider URL. This is the location where the JMS system resides, and is JMS vendor specific.
14. Select whether the agent should trigger itself (recommended) and at what interval (in minutes) or use an external trigger (triggeragent.sh in the <*install_dir*>/install/bin directory).

15. See Setting up the JMS Security Properties for information about setting the JMS Security option.
16. Leave the Criteria Parameters tab values at the default values.
17. Save the Agent Criteria Details and close the window.
18. Launch the agent in its own JVM by executing the startagentserver.sh/cmd script in the <*install_dir*>/install/bin directory.

For additional information about defining transactions and about this procedure, see the sections, *Defining Transactions* and *Specifying a Transaction as Time-Triggered*.

## A.3 Business Process Time-Triggered Transactions

This section provides an alphabetical list of all business process transactions.

**Note:** Some of the statistics collected and tracked in Release 9.0 for time-triggered transactions, monitors, and integration and application servers may change with the next release of Selling and Fulfillment Foundation.

**Note:** All Business Process Time-Triggered Transactions have a `CollectPendingJobs` criteria parameter. If this parameter is set to N, the agent does not collect information about the pending jobs pertaining to this monitor. This pending job information is used for monitoring the monitor in the System Management Console.

By default, `CollectPendingJobs` is set to `Y`. It can be helpful to set it to `N` if one particular time-triggered transaction is performing a significant amount of `getPendingJobs` queries, and the overhead cost is too high.

## A.3.1 Asynchronous Request Processor

This transaction completes any API request or service request in offline mode. It picks up the API messages or service messages from the YFS_ASYNC_REQ table and invokes the corresponding API or service. The messages can be inserted into the YFS_ASYNC_REQ table using the createAsyncRequest API. Some of the business transactions in the Sterling Warehouse Management System also insert the messages into the YFS_ASYNC_REQ table.

### Attributes

Following are the attributes for this time-triggered transaction:

***Table A–1 Asynchronous Request Processor Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | ASYNC_REQ_PROCESSOR |
| Base Process Type | General |
| Abstract Transaction | No |

### Criteria Parameters

Following are the criteria parameters for this transaction:

***Table A–2 Asynchronous Request Processor Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Lead Days | Number of days before the present date the agent will purge the records. If left blank or specified as 0 (zero), it defaults to 30. |

*Table A–2 Asynchronous Request Processor Parameters*

| Parameter | Description |
|---|---|
| Maximum Error Count | Maximum number of times the record is processed if an exception is thrown. Once the number of unsuccessful attempts equals this number, that record is not processed further by the agent. If left blank or specified as 0 (zero), it defaults to 20. |
| Reprocess Interval In Minutes | Time in minutes after which the transaction will be reprocessed - after it has been processed and has thrown an exception. |
| ColonyID | Required in a multischema deployment where the YFS_ASYNC_REQ table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

None

## Pending Job Count

None

## Events Raised

The following events are raised by this time-triggered transaction:

*Table A–3 Events Raised by the Asynchronous Request Processor*

| Transaction/Event | Key Data | Data Published* | Template Support? |
|---|---|---|---|
| HAS_EXCEPTIONS | None | YCP_ASYNC_REQ_PROCESSOR.HAS_EXCEPTIONS.html | Yes |
| *These files are located in the following directory: <INSTALL_DIR>/xapidocs/api_javadocs/XSD/HTML | | | |

## A.3.2 Case Insensitive Data Loader

The Case Insensitive Data Loader agent migrates data from columns marked CaseInsensitiveSearch to shadow columns. The agent uses the transaction criteria to identify the records that need to be updated and then converts the original column values to lowercase values in the shadow columns. For more information about enabling case insensitive searches, refer to the *Selling and Fulfillment Foundation: Extending the Database Guide*.

The Case Insensitive Data Loader agent is required for updating the existing data. Once the shadow columns have been created, the Case Insensitive Data Loader agent only needs to be run once for each table or table type. The shadow columns are then populated in real-time by the application.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–4 Case Insensitive Data Loader Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | DATA_LOADER |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–5 Case Insensitive Data Loader Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time.<br>• If left blank or the number specified is less than 10000, it defaults to 5000.<br>• If the number specified is greater than 10000, then that value is used. |
| CollectPendingJobs | If this parameter is set to "N", the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the System Management Console. |
| TableType | Required in a multischema deployment when a table may exist in multiple schemas.<br>Valid Values: CONFIGURATION, TRANSACTION, MASTER.<br>If set to CONFIGURATION, the agent runs for the records associated with tables that have TableType as CONFIGURATION.<br>If set to TRANSACTION, the agent runs for the records associated with tables that have TableType as TRANSACTION. |
| Table Name | Required. The table name for the records to be migrated to shadow columns. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

None.

### Pending Job Count

None.

### Events Raised

None.

## A.3.3 Change Load Status

This transaction is equivalent to the `changeLoadStatus()` API. For detailed information about this transaction, see the *Selling and Fulfillment Foundation: Javadocs*.

To be configured as part of your load processing pipeline, this transaction can be used whenever an automatic change in the status of a load is required. This automatic change could represent exporting load information to load planning software or transmission to the load's carrier.

**Note:** This transaction should be configured to work from the task queue.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–6 Change Load Status Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | CHANGE_LOAD_STATUS |
| Base Document Type | Load |
| Base Process Type | Load Execution |
| Abstract Transaction | Yes |
| APIs Called | `changeLoadStatus()` |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–7 Change Load Status Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–8 Change Load Status Statistics***

| Statistic Name | Description |
|---|---|
| NumLoadsChanged | Number of loads whose status was changed. |

## Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the CurrentDate value in the YFS_Task_Q table.

## Events Raised

This transaction raises events as specified under the `changeLoadStatus()` API in the *Selling and Fulfillment Foundation: Javadocs*.

## A.3.4 Change Shipment Status

This transaction is equivalent to the `changeShipmentStatus()` API. For detailed information about this transaction, see the *Selling and Fulfillment Foundation: Javadocs*.

To be configured as part of your shipment processing pipeline, this transaction can be used whenever an automatic change in the status of a shipment is required. For example, this automatic change could represent exporting shipment information to a warehouse management system or to transmit an Advance Shipping Notice to the buyer.

**Note:** This transaction should be configured to work from the task queue.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–9 Change Shipment Status Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | CHANGE_SHIPMENT_STATUS |
| Base Document Type | Order |
| Base Process Type | Order Delivery |
| Abstract Transaction | Yes |
| APIs Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–10 Change Shipment Status Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–11 Create Chained Order Statistics***

| Statistic Name | Description |
|---|---|
| NumShipmentsChanged | Number of shipments whose status was changed. |

## Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table.

## Events Raised

This transaction raises events as specified under the `changeShipmentStatus()` API in the *Selling and Fulfillment Foundation: Javadocs*.

## A.3.5 Close Delivery Plan

To boost system performance, this transaction serves as a temporary purge until the Delivery Plan Purge deletes delivery plan-related data (see Section A.4.3.5, "Delivery Plan Purge").

This transaction picks all delivery plans that do not have any of their loads or shipments still open and marks the deliveryplan_closed_flag='Y'. This flag indicates no further operations are possible on the plan.

This transaction corresponds to the base transaction close delivery plan (CLOSE_DELIVERY_PLAN) in the load pipeline.

Any enterprise using the Console must schedule purge jobs.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–12 Close Delivery Plan Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | CLOSE_DELIVERY_PLAN |
| Base Document Type | Load |
| Base Process Type | Load Execution |
| Abstract Transaction | No |
| APIs Called | None |

### Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–13 Close Delivery Plan Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |

*Table A–13 Close Delivery Plan Criteria Parameters*

| Parameter | Description |
|---|---|
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–14 Close Delivery Plan Statistics*

| Statistic Name | Description |
|---|---|
| NumDeliveryPlansClosed | Number of delivery plans closed. |

## Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table.

## Events Raised

The following events are raised by this time-triggered transaction:

*Table A–15 Events Raised by Close Delivery Plan Transaction*

| Transaction/Event | Key Data | Data Published | Template Support? |
|---|---|---|---|
| ON_SUCCESS | delivery_plan_dbd.txt | YDM_CLOSE_DELIVERY_PLAN.ON_SUCCESS.xml | Yes |

However, note that the template name would read <TransactionId>.ON_SUCCESS.xml. The XML and DTD depicted above represent the output that the abstract transaction CLOSE_DELIVERY_PLAN transaction is capable of generating.

## A.3.6 Close Load

To boost system performance, this transaction serves as a temporary purge until the Load Purge deletes load-related data (see Section A.4.3.13, "Load Purge").

This transaction corresponds to the base transaction Close Load (CLOSE_LOAD) in the load pipeline.

If you use the Load processing pipeline, you must schedule this transaction. Only closed loads are picked up by the purge transaction. Therefore, it is required that this transaction be made part of the pipeline and scheduled to run at the end of the day.

**Note:** This transaction should be made part of the pipeline. In addition, it should be configured to work from the task queue.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–16 Close Load Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | CLOSE_LOAD |
| Base Document Type | Load |
| Base Process Type | Load Execution |
| Abstract Transaction | No |
| APIs Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–17 Close Load Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Next Task Queue Interval | Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–18 Close Load Statistics***

| Statistic Name | Description |
|---|---|
| NumLoadsClosed | Number of loads closed. |

## Pending Job Count

For this transaction the pending job count is the number of open delivery plans, which are not associated to any open loads and open shipments.

## Events Raised

The following events are raised by this time-triggered transaction:

***Table A–19 Events Raised by the Close Load Transaction***

| Transaction/Event | Data Published | Template Support? |
|---|---|---|
| ON_SUCCESS | YDM_CLOSE_LOAD_PLAN.ON_SUCCESS.xml | Yes |

However, note that the template name would read <TransactionId>.ON_SUCCESS.xml. The XML and DTD represent the output of the abstract transaction CLOSE_LOAD transaction.

## A.3.7 Close Manifest

This time-triggered transaction sets the manifest's MANIFEST_CLOSED_FLAG flag to 'Y' and updates the manifest status to CLOSED. This time-triggered transaction confirms all the shipments that are pending confirmation, and closes the manifest.

**Note:** If the Close Manifest Agent is triggered without any criteria, it closes all the candidate manifests across all ShipNodes.

The `yfs.closemanifest.online` property in the `yfs.properties_ysc_ext.in` file is used to set this time-triggered transaction to work in online or offline mode.

- **Online mode:** In the online mode, the close manifest transaction runs as usual, confirming all shipments in the manifest and then closing the manifest.
- **Offline mode:** In the offline mode, the close manifest transaction triggers an agent and changes the manifest status to 'Closure Requested'. When the agent runs, it confirms either each shipment of the manifest, or closes the manifest, in an execution call.

The mode of operation (online or offline) is decided on the basis of the value specified for the `yfs.closemanifest.online` property in the `yfs.properties_ycs_ext.in` file. To override this property, add an entry for it in the `<INSTALL_DIR>/properties/customer_overrides.properties` file. For additional information about overriding properties using the `customer_overrides.properties` file, see the *Selling and Fulfillment Foundation: Properties Guide*.

The default out-of-the-box shipped property causes the Close Manifest transaction to run in online mode.

**Note:** In instances where the Close Manifest transaction is run in offline mode, ensure that all Agent Criteria defined for the transaction are configured properly.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–20 Close Manifest Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | CLOSE_MANIFEST |
| Base Document Type | General |
| Base Process Type | Manifesting |
| Abstract Transaction | No |
| APIs Called | confirmShipment() |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–21 Close Manifest Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| AgentCriteriaGroup | Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that only perform their tasks on the nodes with a matching node transactional velocity value.<br>Valid values are: LOW, HIGH, and any additional values defined by the Hub from Application Platform > System Administration > Agent Criteria Groups. |
| ShipNode | Optional. Ship node for which the Close Manifest needs to be run. If not passed, then all ship nodes are monitored. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following are statistics are tracked for this transaction:

***Table A–22 Close Manifest Statistics***

| Statistic Name | Description |
|---|---|
| NumShipmentsConfirmed | Number of shipments confirmed. |
| NumManifestsClosed | Number of manifests closed. |
| NumManifestsErrored | Number of manifests errored. |
| NumShipmentsErrored | Number of shipments errored. |

### Pending Job Count

For this transaction the pending job count is the sum of open manifests and shipments belonging to manifests (with MANIFEST_STATUS='1200').

### Events Raised

The following events are raised by this time-triggered transaction:

***Table A–23 Events Raised by the Close Manifest Transaction***

| Transaction/Event | Key Data | Data Published | Template Support? |
|---|---|---|---|
| ON_SUCCESS | manifest_dbd.txt | YDM_CLOSE_MANIFEST.ON_SUCCESS.xml | Yes |

## A.3.8 Close Order

This time-triggered transaction sets the order's ORDER_CLOSED flag to 'Y' and raises the ON_SUCCESS event. These actions are only performed when the entire ORDER_QTY for all the order lines reaches the configured pickup status. If an order has ORDER_CLOSED set to 'Y', it is not picked up for monitoring.

**Note:** The Close Order agent must be configured along with the Purge transaction in the pipeline.

**Note:** The Close Order agent must be run before running the Monitor agent in order to avoid alerts getting raised for cancelled orders.

**Note:** Many of this transaction's elements and attributes are template-driven. Refer to the XML for element level details.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–24 Close Order Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | CLOSE_ORDER |
| Base Document Type | Order |
| Base Process Type | Order FulFillment |
| Abstract Transaction | No |
| APIs Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–25 Close Order Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Next Task Queue Interval | Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–26 Close Order Statistics***

| Statistic Name | Description |
|---|---|
| NumOrdersProcessed | Number of orders processed. |
| NumOrdersClosed | Number of orders closed. |

## Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table, if tasks on hold are not ready to be processed.

### Events Raised

The following events are raised by this time-triggered transaction:

***Table A–27 Events Raised by the Close Order Transaction***

| Transaction / Event | Data Published | Template Support? |
|---|---|---|
| ON_SUCCESS | YFS_CLOSE_ORDER.ON_SUCCESS.xml | Yes |

## A.3.9 Close Receipts

This time-triggered transaction closes receipts using the receiving rule specified.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–28 Close Receipts Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | RECEIPT_COMPLETE |
| Base Document Type | Order |
| Base Process Type | Receipt (Purchase Order Receipt, Return Receipt, Transfer Order Receipt, Sales Order Receipt) |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–29 Close Receipts Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| EnterpriseCode | Enterprise for which the Close Receipts needs to be run. If not passed, then all enterprises are monitored. |
| Node | Mandatory. Node for which the Close Receipts needs to be run. |
| AgentCriteriaGroup | Used to classify nodes. This value can be accepted by WMS time-triggered transactions that only perform their tasks on the nodes with a matching node transactional velocity value.<br>Valid values are: LOW, HIGH, and any additional values defined by the Hub from Application Platform > System Administration > Agent Criteria Groups. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–30 Close Receipts Statistics***

| Statistic Name | Description |
|---|---|
| NumReceiptsClosed | Number of receipts closed. |

### Pending Job Count

For this transaction the pending job count is the number of Receipts that can be closed (with OPEN_RECEIPT_FLAG='Y').

### Events Raised

The following events are raised by this time-triggered transaction:

***Table A–31 Events Raised by the Close Receipts Transaction***

| Transaction/Event | Key Data | Data Published | Template Support? |
|---|---|---|---|
| ON_SUCCESS | receipt_dbd.txt | YFS_RECEIPT_COMPLETE.ON_SUCCESS.xml | Yes |

**Troubleshooting Tip:** When multiple inbound shipments are received into the same location, and the inventory received is not license plated, an error message, "There is no inventory for put away at the SourceLocation" displays. The solution to this problem lies in one of these steps:

- Manually create move requests for receipts that you already received. For more information about creating move requests, refer to the *Sterling Warehouse Management System: User Guide*.
- For receipts that are expected to be received, ensure that the inventory is license plated and that you don't receive inbound shipments and inventory for put away into the same location.

## A.3.10 Close Shipment

To boost system performance, this transaction serves as a temporary purge until the Shipment Purge deletes all shipment-related data (see Section A.4.3.33, "Shipment Purge").

This transaction picks all shipments eligible to be closed, based on the pipeline configuration for pickup for transaction CLOSE_SHIPMENT, and marks the shipment_closed_flag='Y'. This flag indicates no further operations are possible on the shipment. There is no status change

involved. This transaction can be configured in the pipeline so that it picks up either Shipped or Delivered status.

This transaction corresponds to the base transaction close shipment (CLOSE_SHIPMENT) in the shipment pipeline.

**Note:** This transaction should be made part of the pipeline. In addition, it should be configured to work from the task queue.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–32 Close Shipment Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | CLOSE_SHIPMENT |
| Base Document Type | Order |
| Base Process Type | Order Delivery |
| Abstract Transaction | No |
| APIs Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–33 Close Shipment Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |

*Table A–33 Close Shipment Criteria Parameters*

| Parameter | Description |
|---|---|
| Next Task Queue Interval | Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following are statistics are tracked for this transaction:

*Table A–34 Close Shipment Statistics*

| Statistic Name | Description |
|---|---|
| NumShipmentsClosed | Number of shipments closed. |

## Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table.

## Events Raised

The following events are raised by this time-triggered transaction:

*Table A–35 Events Raised by the Close Shipment Transaction*

| Transaction/Event | Key Data | Data Published | Template Support? |
|---|---|---|---|
| ON_SUCCESS | shipment_dbd.txt | YDM_CLOSE_SHIPMENT.ON_SUCCESS.xml | Yes |

## A.3.11 Collect Shipment Statistics

Collect Shipment Statistics is a time-triggered transaction which can be invoked to process the shipments, and generate information required for the Daily Shipment Report.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–36 Collect Shipment Statistics Attributes***

| Attribute | Value |
|---|---|
| Transaction Name | Collect Shipment Statistics |
| Transaction ID | COLLECT_STATISTICS |
| Base Document Type | Order |
| Base Process Type | Order Delivery |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | None |

### Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–37 Collect Shipment Statistics Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Node | Required. The warehouse management ship node for which records are being processed. |

*Table A–37 Collect Shipment Statistics Criteria Parameters*

| Parameter | Description |
|---|---|
| AgentCriteriaGroup | Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that only perform their tasks on the nodes with a matching node transactional velocity value.<br>Valid values are: LOW, HIGH, and any additional values defined by the Hub from Application Platform > System Administration > Agent Criteria Groups. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–38 Statistics for Collect Shipment Statistics*

| Statistic Name | Description |
|---|---|
| NumDaysStatisticsCollected | Number of days for which shipment statistics have been collected. |

## Pending Job Count

For this transaction the pending job count is the number of days for which shipment statistics needs to be collected. The number of days is calculated as the difference (in days) between the current date and the last date when shipment statistics was collected.

## Events Raised

The following events are raised by this time-triggered transaction:

*Table A–39 Events Raised by the Collect Shipment Statistics Transaction*

| Transaction/Event | Data Published | Template Support? |
|---|---|---|
| ON_SUCCESS | YDM_COLLECT_STATISTICS.ON_SUCCESS.xml | No |

## A.3.12 Consolidate Additional Inventory

The Consolidate Additional Inventory time-triggered transaction consolidates supply and demand from the YFS_INVENTORY_SUPPLY_ADDNL and YFS_INVENTORY_DEMAND_ADDNL tables. Consolidation is performed by summing up the quantities of additional supply and demand in the YFS_INVENTORY_SUPPLY and YFS_INVENTORY_DEMAND tables.

If no matching supply or demand is found, a new supply or demand is created with the sum quantity of the changes in the YFS_INVENTORY_SUPPLY_ADDNL and YFS_INVENTORY_DEMAND_ADDNL tables. After the changes are applied, the records in the YFS_INVENTORY_SUPPLY_ADDNL and YFS_INVENTORY_DEMAND_ADDNL tables that were used in the consolidation process, are deleted.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–40 Consolidate Additional Inventory Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | CONSOLIDATE_ADDNL_INV |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |

## Criteria Parameters

The following are the parameters for this transaction:

***Table A–41 Consolidate Additional Inventory Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of inventory item records (whose additional supplies and demands are consolidated_ to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| ColonyID | Required in a multischema deployment where the YFS_INVENTORY_SUPPLY_ADDNL and YFS_ INVENTORY_DEMAND_ADDNL tables may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–42 Consolidate Additional Inventory Statistics***

| Statistic Name | Description |
|---|---|
| NumInventorySupplyAddnlsProcessed | Number of additional inventory supply records processed in the consolidation. |
| NumInventoryDemandAddnlsProcessed | Number of additional inventory demand records processed in the consolidation. |
| NumInventoryDemandDtlsProcessed | Number of inventory demand details records processed in the consolidation. |

## Pending Job Count

For this transaction the pending job count is the number of distinct inventory items in the YFS_INVENTORY_SUPPLY_ADDNL and YFS_ INVENTORY_DEMAND_ADDNL tables, multiplied by two.

### Events Raised

None.

## A.3.13 Consolidate To Shipment

This is a task queue based transaction in the order pipeline that corresponds to base transaction CONSOLIDATE_TO_SHIPMENT. This transaction finds a shipment into which a given order release can be included. If it finds an existing shipment, it calls `changeShipment()` API. Otherwise, it calls the `createShipment()` API.

To find the existing shipments it matches ShipNode, ShipTo Address, SellerOrganizationCode, Carrier, DocumentType and so forth, of the Order Release with that of existing shipments. List of attributes it matches is actually based on Document Template for Document Type of the Order.

This transaction is applicable only to the shipments in one of the following Statuses:

- Shipment Created
- ESP Check Required
- On ESP Hold
- Released from ESP Hold
- Released For Routing
- Awaiting Routing
- Shipment Routing
- Sent To Node
- Shipment Being Picked

**Troubleshooting Tip:** To successfully consolidate an Order Release to an existing shipment, the Add Line and related modification types on shipment in its current status should be allowed.

For more information, see the details provided under the `createShipment()`, `changeShipment()`, and `releaseOrder()` APIs in the *Selling and Fulfillment Foundation: Javadocs*.

**Note:** This transaction is a part of the Order Fulfillment pipeline. In addition, it should be configured to work from the task queue.

**Note:** Order releases with GIFT_FLAG set to Y are never consolidated with any other release.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–43 Consolidate to Shipment Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | CONSOLIDATE_TO_SHIPMENT |
| Base Document Type | Order |
| Base Process Type | Order Fulfillment |
| Abstract Transaction | No |

***Table A–43 Consolidate to Shipment Attributes***

| Attribute | Value |
|---|---|
| APIs Called | `createShipment()` and `changeShipment()` |
| User Exits | • It calls beforeConsolidateToShipment in com.yantra.ydm.japi.ue.<br>• YDMBeforeConsolidateToShipment for each release before it begins processing.<br>• After it finds the shipments, it calls determineShipmentToConsolidateWith in com.yantra.ydm.japi.ue.YDMDetermineShipmentToConsolidateWith. For more information, see the *Selling and Fulfillment Foundation: Javadocs*. |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–44 Consolidate to Shipment Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Next Task Queue Interval | Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–45 Consolidate to Shipment Statistics***

| Statistic Name | Description |
|---|---|
| NumOrderReleasesConsolidated | Number of order releases consolidated. |

## Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table.

## Events Raised

The following events are raised by this time-triggered transaction:

***Table A–46 Events Raised by the Consolidate to Shipment Transaction***

| Transaction/Event | Key Data | Data Published | Template Support? |
|---|---|---|---|
| ON_SUCCESS | shipment_dbd.txt | YDM_CONSOLIDATE_TO_SHIPMENT.ON_SUCCESS.xml | Yes |

**Note:** This transaction also raises events as specified under the `createShipment()` and `changeShipment()` APIs in the *Selling and Fulfillment Foundation: Javadocs*.

However, note that the template name would read <TransactionId>.ON_SUCCESS.xml.The XML and DTD depicted above represent the output that the abstract transaction CONSOLIDATE_TO_SHIPMENT transaction is capable of generating.

## A.3.14 Create Catalog Index

The Create Catalog Index transaction builds the Apache Lucene index file that is used by catalog search. This index file enhances search performance by storing denormalized item data that has been extracted from the Selling and Fulfillment Foundation database or from an external source.

The Create Catalog Index transaction can be configured to perform the following tasks:

- Run either a scheduled index build or user-initiated index build
- Build either a full or incremental index file
- Activate the index file

### The Index Building Process

The Create Catalog Index transaction provides an agent for index building. Index building is a multi-thread process in which the index building agent extracts item and item-related information from the active selling catalog in the Selling and Fulfillment Foundation database. If the corresponding XML configuration file has been extended, the agent may extract this information from an external source.

The agent writes this information to multiple files, which identify the item data that should be included in the final index. After the agent finishes writing the files, it merges them into the final index file.

The multi-thread process provides the advantage of parallel processing. Large amounts of database data are segmented and processed simultaneously, which is faster and more scalable than sequentially processing one long file.

When writing information to multiple files, the index building agent performs the following tasks for each item before looping to the next item:

- Queries the Selling and Fulfillment Foundation database or an external source for data about the item.
- Uses information from the XML configuration file and extension file to determine the data that be retrieved from the query.
- Retrieves relevant data from the Selling and Fulfillment Foundation database.

- Creates a Lucene document for the item.

After the transaction creates a Lucene document for each item, the transaction writes the documents to the index file based on the organization and the organization's locales.

## Attributes

Table A–47 displays the attributes for the Create Catalog Index transaction.

***Table A–47 Create Catalog Index***

| Attribute | Value |
|---|---|
| Base Transaction ID | Create_Catalog_Index |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YCMParseAssetUE<br>YCMGetAdditionalCatalogIndexInformationUE |

## Criteria Parameters

Table A–48 displays the criteria parameters for the Create Catalog Index transaction.

***Table A–48 Create Catalog Index***

| Parameter | Description |
|---|---|
| Organization Code | Required. The organization code of the catalog organization or subcatalog organization that maintains the search index. |
| Number of Messages | Required. Number of messages to use when building the index file.<br>Selling and Fulfillment Foundation processes only one message per thread. For example, if Number of Messages is set to 10 and Threads is set to 3, Selling and Fulfillment Foundation processes only 3 messages at a time. For more information about fine-tuning system performance, see the *Selling and Fulfillment Foundation: Performance Management Guide*. |
| Incremental Build | Y or N.<br>Y to rebuild the existing index file. If you specify Y, Selling and Fulfillment Foundation rebuilds the index based on the last successful index build.<br>N to build a full index file.<br>This parameter is ignored for user-initiated index builds. However, if scheduled builds are configured, ensure that you specify whether you want a full or incremental index build. |
| Category Domain | Optional. The catalog from which the index is built. The active selling catalog of the catalog organization or subcatalog organization is the default. If scheduled builds are configured, ensure that you specify a catalog. |
| Auto Activate | Y or N. Optional.<br>Y to activate the index after building the index file.<br>The default is N. |

***Table A–48 Create Catalog Index***

| Parameter | Description |
|---|---|
| Auto Insert Search Index Trigger | Y or N. Optional.<br>Y to enable scheduled builds of the catalog index file. The agent refers to information stored in the YFS_SEARCH_INDEX_TRIGGER table to determine when to run the scheduled index build. Specify the type of index build, whether full or incremental, in the agent criteria.<br>N to enable user-initiated builds of the catalog index file. The agent continuously queries the YFS_SEARCH_INDEX_TRIGGER table to determine whether an index build is indicated. If a user starts an index build from the Business Center, the status setting in the table changes to Scheduled, triggering the agent to build the index. The user specifies the type of index build, whether full or incremental, from the Business Center.<br>After a scheduled or user-initiated build runs, the user can activate the index from the Business Center. Alternatively, the agent can be configured to automatically activate the index.<br>To allow both scheduled and user-initiated index builds, configure the transaction to include two instances of the agent. Configure one instance to trigger user-initiated builds and the second instance to trigger scheduled index builds. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

Table A–49 shows the statistics that are tracked for the Create Catalog Index transaction.

***Table A–49 Create Catalog Index***

| Statistic Name | Description |
|---|---|
| SearchIndicesBuilt | Number of search indices that have been built. |

### Pending Job Count

None.

### Events Raised

None.

## A.3.15 Create Chained Order

This transaction creates one or more chained orders from an order whose OrderHeaderKey is stored in the task queue object. Chainable lines of the order can also be added to existing chained orders, instead of creating new chained orders with these lines. The existing chained orders must be identified by the `determineChainedOrderForConsolidation` user exit. If the user exit is not implemented, or if the user exit returns a blank document, one or more new chained orders are created.

For more information about the creation of chained orders, see the information provided under the `createChainedOrder()` API and the `YFSDetermineChainedOrderForConsolidation` user exit in the *Selling and Fulfillment Foundation: Javadocs*.

This transaction should be invoked after order scheduling.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–50 Create Chained Order Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | CHAINED_ORDER_CREATE |
| Base Document Type | Order |
| Base Process Type | Order Fulfillment |
| Abstract Transaction | Yes |
| APIs Called | `createChainedOrder()` |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–51 Create Chained Order Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Next Task Queue Interval | Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–52 Create Chained Order Statistics***

| Statistic Name | Description |
|---|---|
| NumOrdersProcessed | Number of orders processed for creating chained order. |
| NumOrdersCreated | Number of chained orders created. |

**Note:** If there are 2 orders being processed and the first order creates a chained order, the DetermineChainedOrderForConsolidation user exit causes the lines of the 2nd order to be added to the first order. The number of chained orders created is counted as 2.

### Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table.

### Events Raised

This transaction raises events as specified under the `createChainedOrder()` API in the *Selling and Fulfillment Foundation: Javadocs*.

## A.3.16 Create Derived Order

This transaction creates one or more derived orders from an order whose OrderHeaderKey is stored in the task queue object. For existing derived orders, you can add derivable lines or create new derived orders with these lines. The existing derived orders must be identified by the `determineDerivedOrderForConsolidation` user exit. If the user exit is not implemented or if the user exit returns a null document, new derived orders are created. For more information about the creation of derived orders, see the details provided under the `createDerivedOrder()` API and `YFSDetermineDerivedOrderForConsolidation` user exit in the *Selling and Fulfillment Foundation: Javadocs*.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–53 Create Derived Order Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | DERIVED_ORDER_CREATE |
| Base Document Type | Order |
| Base Process Type | Order Fulfillment |
| Abstract Transaction | Yes |
| APIs Called | `createDerivedOrder()` |

**Note:** The TransactionKey posted in the task queue object must be an instance of the Abstract Transaction DERIVED_ORDER_CREATE for the ProcessType associated with the Order. Otherwise, an exception is thrown.

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–54 Create Derived Order Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Next Task Queue Interval | Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–55 Create Derived Order Statistics***

| Statistic Name | Description |
|---|---|
| NumOrdersProcessed | Number of orders processed. |
| NumOrdersCreated | Number of derived orders created. |

**Note:** If there are 2 orders being processed and the first order creates a derived order, the DetermineChainedOrderForConsolidation user exit causes the lines of the 2nd order to be added to the first order. The number of derived orders created is counted as 2.

### Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table.

### Events Raised

This transaction raises events as specified under the `createDerivedOrder()` API in the *Selling and Fulfillment Foundation: Javadocs*.

## A.3.17 Create Order Invoice

This transaction creates one or more invoices from an order whose OrderHeaderKey is stored in a task queue object. The `createOrderInvoice()` API is called for the OrderHeaderKey.

Configure this transaction in the pipeline only after all processing that can impact quantity or price has been completed. Post invoice creation, the line quantity cannot be reduced below the invoiced quantity.

**Note:** Both the Create Order Invoice and Create Shipment Invoice transactions can create invoices for an Order. When configuring your pipeline, ensure that only *one* of these two transactions is configured to create invoices for a particular order line. For more information, see Section A.3.18, "Create Shipment Invoice".

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–56 Create Order Invoice Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | CREATE_ORDER_INVOICE |
| Base Document Type | Order |
| Base Process Type | Order Fulfillment |
| Abstract Transaction | Yes |
| APIs Called | `createOrderInvoice()` |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–57 Create Order Invoice Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–58 Create Order Invoice Statistics***

| Statistic Name | Description |
|---|---|
| NumOrderInvoicesCreated | Number of order invoices created. |

### Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table.

### Events Raised

This transaction raises events as specified under the `createOrderInvoice()` API in the *Selling and Fulfillment Foundation: Javadocs*.

## A.3.18 Create Shipment Invoice

Invoicing is mandatory if an order requires payment processing. Invoicing occurs if the following conditions are met:

- Invoicing is enabled at the document parameter level.
- The Seller requires payment processing.

This transaction creates one or more invoices for the shipment whose ShipmentKey is stored in the task queue object. The `createShipmentInvoice()` API is called for the ShipmentHeaderKey.

This transaction should be configured in the shipment pipeline only after the shipment has reached a shipped status.

**Note:** Both the Create Order Invoice and Create Shipment Invoice can create invoices for an order. When configuring your pipeline, ensure that only *one* of these two transactions is configured to create invoices for a particular order line. See Section A.3.17, "Create Order Invoice".

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–59 Create Shipment Invoice Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | CREATE_SHIPMENT_INVOICE |
| Base Document Type | Order |
| Base Process Type | Order Delivery |
| Abstract Transaction | Yes |
| APIs Called | `createShipmentInvoice()` |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–60 Create Shipment Invoice Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–61 Create Shipment Invoice Statistics***

| Statistic Name | Description |
|---|---|
| NumShipmentInvoicesCreated | Number of shipment invoices created. |

### Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table.

### Events Raised

This transaction raises events as specified under the `createShipmentInvoice()` API in the *Selling and Fulfillment Foundation: Javadocs*.

## A.3.19 ESP Evaluator

The ESP Evaluator time-triggered transaction verifies whether a shipment meets certain economic shipping parameters (ESP). ESP can be configured either for buyer or enterprise, with the freight terms on the shipment determining which one is used.

If the configuration is defined to hold shipment for ESP, the shipment when created is held for ESP (with status *On ESP Hold*). This task queue based time-triggered transaction evaluates the shipment for ESP, and passes it on to the next step in the shipment pipeline if the criteria (weight and volume limits, plus maximum days of hold up) are met. The shipment status is now set to *Released from ESP hold*, and routing processing begins.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–62 ESP Evaluator Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | ESP_EVALUATOR.0001 |
| Base Document Type | Order |
| Base Process Type | Outbound Shipment |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | getNodeMinimumNotificationTime |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–63 ESP Evaluator Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| EnterpriseCode | Optional. Enterprise for which the ESP Evaluator needs to be run. If not passed, then all enterprises are monitored. |
| Number of Records to Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Next Task Queue Interval | Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours. |
| Node | Required. The warehouse management ship node for which records are being processed. |

*Table A–63 ESP Evaluator Criteria Parameters*

| Parameter | Description |
|---|---|
| AgentCriteriaGroup | Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that only perform their tasks on the nodes with a matching node transactional velocity value.<br>Valid values are: LOW, HIGH, and any additional values defined by the Hub from Application Platform > System Administration > Agent Criteria Groups. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

None.

## Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table.

## Events Raised

The following events are raised by this time-triggered transaction:

*Table A–64 Events Raised by ESP Evaluator Transaction*

| Transaction/Event | Key Data | Data Published | Template Support? |
|---|---|---|---|
| ON_SUCCESS | shipment_dbd.txt | ESP_EVALUATOR.ON_SUCCESS.xml | Yes |

## A.3.20 Item Based Allocation

The Item Based Allocation transaction allocates unpromised and promised demands of existing orders to more suitable supplies based upon inventory items and nodes which have been triggered for the Item Based Allocation process in the YFS_IBA_TRIGGER table.

The Item Based Allocation agent obtains and processes all Item Based Allocation triggers from the YFS_IBA_TRIGGER table that meet the following conditions:

- IBA_RUN_REQUIRED = "Y"
- LAST_IBA_PROCESSED_TS was 'x' hours before current time, where 'x' is from the 'Item Based Allocation Agent Execution Interval (in hours)' rule in the Installation rules. For more information about installation rules, refer to the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*. This rule is used to indicate the interval that the Item Based Allocation agent should not reprocess the triggers in the YFS_IBA_TRIGGER table, which were processed earlier. This prevents the IBA agent from over-processing the item and node combination in the given time interval to avoid any high loads on the system.
- PROCESSING_BY_AGENT="N" or PROCESS_OVER_BY_TS is before the current timestamp. The PROCESSING_BY_AGENT field is used to prevent the picking up of the IBA trigger which is being processed by another instance of the agent.

If InventoryOrganizationCode is specified in the agent criteria, only the IBA trigger with inventory items of that inventory organization is retrieved.

For each triggered item and node combination, the agent finds all of the applicable order lines or order line reservations that contain the item and node and tries to move their unpromised and promised demands to more suitable available supplies based on user-configured IBA selection rules or FIFO (First-In-First-Out) IBA selection rules.

Selling and Fulfillment Foundation creates new positive order line reservations with the matched supply's first ship date and negative order line reservations for the existing demand ship date. Once all orders are processed, they are placed on hold to be rescheduled if changes are detected in the order line reservations.

**Note:** The following configuration is required for the Item Based Allocation process:

- The Use Item Based Allocation rule needs to be enabled.
- Item and node need to have Item Based Allocation Allowed enabled.
- A hold type is required to be set up for the change order line reservations modification type so that the order can be placed on hold for rescheduling. For more information, refer to the *Selling and Fulfillment Foundation: Javadocs*.

**Note:** The 'When a line is backordered, backorder against the highest priority ship node' rule should be checked in order to reallocate backordered demand. For more information, see the Fulfillment Rules section in the *Sterling Distributed Order Management: Configuration Guide*.

Before processing the Item Based Allocation logic, the Item Based Allocation agent updates the following fields on the Item Based Allocation trigger:

- PROCESSING_BY_AGENT = "Y". This indicates that an instance of the agent is currently processing this trigger.
- PROCESS_OVER_BY_TS = current time + 1 hr. This indicates the expected time that the agent should finish with processing this IBA trigger. One hour is the fixed window and cannot be changed. Selling and Fulfillment Foundation treats the PROCESSING_BY_AGENT flag as "N" regardless of the actual value when current timestamp is after this timestamp.
- IBA_RUN_REQUIRED = "N". This resets the IBA_RUN_REQUIRED flag back to "N".

### Obtaining a List of Demands Based on Applicable Order Release Statuses and Order Line Reservations to be Allocated

A list of demands is derived from applicable order release statuses and order line reservations, which have the item and node in the IBA trigger. The following types of demands are retrieved:

- Demands of chained orders
- Demands of orders with chained order already created
- Demands of orders with procurement node but chained order creation is not yet created
- Demands of orders without procurement node
- Demands from order line reservations

The demand quantity is derived based on the order release status quantity with the status from the Status Inventory Type configuration that has a demand type, which considers the supply type with 'Use Consider Demand Type for Item Based Allocation' enabled. For more information, refer to the *Sterling Global Inventory Visibility: Configuration Guide*.

### Obtaining a List of Available Supplies for Allocation

Selling and Fulfillment Foundation obtains the available supply based on the availability of the item at the node by ignoring unpromised and promised demands. If the inventory organization maintains its inventory externally, the external availability can be read by the `YFSGetExternalInventoryUE` user exit. Only the availability of supplies that consider the 'Demand Type Look for Availability during Item Based Allocation' are used in the allocation logic. For more information, refer to the *Sterling Global Inventory Visibility: Configuration Guide*.

**Note:** Allocated demands should be matched with the same supplies as "Demand to look for during release".

### Matching Demands Against Supplies in FIFO (First-In-First-Out) Order

Selling and Fulfillment Foundation sorts the list of available supplies in the order of the first shippable date (ETA), and matches the obtained list of demands using the top-down logic (unlike the normal matching logic for obtaining availability, where matches are based on the closest ETA). Demands are allocated in the following orders:

- Demands of chained orders - first based on user-configured sequencing rules, and then in ascending order of order creation date. (These types of demands are matched based on the closest ETA to avoid any changes in the chained orders).
- Demands of orders with a chained order already created - first based on user-configured sequencing rules, then in ascending order of product availability date. (These types of demands are matched based on the closest ETA to avoid any changes in the orders).
- Demands of orders for which procurement node and chained order creation is imminent (within the advanced notification time window) - first based on user-configured sequencing rules, then in order of order creation date.
- Demands of orders without a procurement node and within the release window (advanced notification time window) - first based on user-configured sequencing rules, then in order of order creation date.
- Demands from order line reservations on the order lines in the order of requested reservation date, and left-over demands (outside of the advanced notification time window) of orders with or without a procurement node, first based on user-configured sequencing rules and then in the order of order creation date.
- Demands from inventory reservations in the order of ship date.

Notice that different types of demands are given different priorities based on their significance. The demands of chained orders or orders related to chained orders are treated with a higher priority than the demands of normal orders. Furthermore, the demands with a ship date within the advanced notification time window also have a higher priority than the demands with a date outside of the advanced notification time window.

## Updating Order Reservations for the Matched Demands

After matching the available supply and demand in user-configured sequencing and then in FIFO order, the system builds up a list of order line reservation changes and inventory demand changes (corresponding to the order line reservation changes) and summarize them to optimize the number of order reservation updates and inventory updates. Negative order line reservations are added for the matched demands. Positive order reservations are added for the matched demands with the product availability date set to the matched supplies' first ship date.

After the Item Based Allocation agent completes its tasks for an Item Based Allocation trigger, it updates the fields of the trigger with the following values:

- IBA_REQUIRED = "N"
- LAST_IBA_PROCESSED_TS = current timestamp.
- PROCESS_OVER_BY_TS = current timestamp.
- PROCESSING_BY_AGENT = "N"

The Item Based Allocation agent should be used in conjunction with the rescheduling process as the rescheduling process reschedules the affected orders by utilizing the order line reservations created by the Item Based Allocation process.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–65 Item Based Allocation Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | ITEM_BASED_ALLOCATION |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | changeOrder – for updating the order line reservations created as part of the Item Based Allocation process. |
| User Exits Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–66 Item Based Allocation Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| InventoryOrganizationCode | The inventory organization code of the inventory items which are processed by the Item Based Allocation agent. If provided, only the IBA triggers with the inventory item that belongs to this inventory organization are processed. |
| ColonyID | Required in a multischema deployment where the YFS_IBA_TRIGGER table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–67 Item Based Allocation Statistics***

| Statistic Name | Description |
|---|---|
| NumOrdersProcessed | Number of orders processed by the Item Based Allocation agent. |
| NumOrdersRequiredReschedule | Number of orders required rescheduling as the result of Item Based Allocation process. |

### Pending Job Count

None.

### Events Raised

This transaction raises events as specified under the changeOrder API in the *Selling and Fulfillment Foundation: Javadocs*.

## A.3.21 Mark Load as Trailer Loaded

This is a time-triggered transaction which works on “Load pipeline”.

This time-triggered transaction gets records from the Task Q. This transaction is used to mark the load as trailer loaded when all containers for the load are on the trailer.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–68 Mark Load As Trailer Loaded Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | MARK_AS_TRAILER_LOADED |
| Base Document Type | Load |
| Base Process Type | Load Execution |
| Abstract Transaction | No |

*Table A–68 Mark Load As Trailer Loaded Attributes*

| Attribute | Value |
|---|---|
| APIs Called | None |
| User Exits Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

*Table A–69 Mark Load As Trailer Loaded Criteria Parameters*

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| ReprocessInterval | Optional. Reprocess Interval is the time taken to reprocess the load. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–70 Mark Load As Trailer Loaded Statistics*

| Statistic Name | Description |
|---|---|
| NumLoadsChanged | Number of trailer loads changed. |

## Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table.

### Events Raised

None.

## A.3.22 Match Inventory

Match Inventory processes all pending records in the YFS_INVENTORY_SHIPMENT table. Pending records have a smaller number in POSTED_QUANTITY than in QUANTITY.

Each pending record is matched against the receipt records in YFS_INVENTORY_RECEIPT table by applying the inventory cost determination logic. The unit cost at which the sales and receipt data are matched is also posted in YFS_INVENTORY_MATCH table.

Use this transaction if any of the configured ship nodes maintain inventory cost.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–71 Match Inventory Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | INVENTORY_MATCH |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–72 Match Inventory Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| InventoryOrganizationCode | Optional. Valid inventory owner organization. Organization to process in this run. If not passed, all inventory organizations are processed. |
| CutOffDate | Optional. If passed, records are matched up to this date. Defaults to all unmatched records in Database. |
| ColonyID | Required in a multischema deployment where the YFS_INVENTORY_SHIPMENT, YFS_INVENTORY_RECEIPT, and the YFS_INVENTORY_MATCH tables may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–73 Match Inventory Statistics***

| Statistic Name | Description |
|---|---|
| NumInventoryShipmentsProcessed | Number of inventory shipments processed. |
| NumInventoryMatchesInserted | Number of inventory matches inserted. |

### Pending Job Count

For this transaction the pending job count is the number of distinct inventory items that exist in the YFS_INVENTORY_SHIPMENT table where the QUANTITY value is not equal to the POSTED_QUANTITY value.

### Events Raised

None.

## A.3.23 Payment Collection

This transaction requests credit validation for orders that are pending authorization or charging.

Use this transaction for creating authorization and charge requests.

> **Note:** This transaction works in combination with the Payment Execution transaction. Although this transaction can run independent of that transaction, authorization and collection occurs *only* after the Payment Execution dependencies are met. For more details, see Section A.3.24, "Payment Execution".

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–74 Payment Collection Attributes for Sales Orders***

| Attribute | Value |
|---|---|
| Base Transaction ID | PAYMENT_COLLECTION |
| Base Document Type | Order |
| Base Process Type | Order Fulfillment |
| Abstract Transaction | No |
| APIs Called | `requestCollection()` |

***Table A–75 Payment Collection Attributes for Return Orders***

| Attribute | Value |
|---|---|
| Base Transaction ID | PAYMENT_COLLECTION.0003 |
| Base Document Type | Order |
| Base Process Type | Reverse Logistics |
| Abstract Transaction | No |
| APIs Called | `requestCollection()` |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–76 Payment Collection Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| EnterpriseCode | Optional. The enterprise for which the transaction needs to be run. If left blank, orders for all enterprises are processed. If specified, only orders for that enterprise are processed. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–77 Payment Collection Statistics***

| Statistic Name | Description |
|---|---|
| NumOrdersProcessed | Number of orders processed. |
| NumChargeReqsCreated | Number of charge requests created. |
| NumAuthorizationReqsCreated | Number of authorization requests created. |

## Pending Job Count

For this transaction the pending job count is the number of orders in the appropriate payment statuses with the value of the AUTHORIZATION_EXPIRATION_DATE is less than or equal to (<=) the current date. The appropriate payment statuses for such orders are:

- AWAIT_PAY_INFO
- AWAIT_AUTH
- REQUESTED_AUTH
- REQUEST_CHARGE
- AUTHORIZED, INVOICED
- PAID
- RELEASE_HOLD
- FAILED_AUTH
- FAILED_CHARGE
- VERIFY
- FAILED

### Events Raised

The following events are raised by this time-triggered transaction:

***Table A–78 Events Raised by the Payment Collection Transaction***

| Transaction / Event | Key Data | Data Published | Template Support? |
|---|---|---|---|
| INCOMPLETE_ PAYMENT_ INFORMATION | modifyOrder_dbd.txt | YFS_PAYMENT_ COLLECTON.INCOMPLETE_PAYMENT_ INFORMATION.xml | Yes |
| PAYMENT_STATUS | YFS_ PAYMENT_ COLLECTION.PAYMENT_STATUS_ dtd.txt | YFS_PAYMENT_ COLLECTION.PAYMENT_STATUS.xml | Yes |
| REQUEST_ PAYMENT_STATUS | | YFS_PAYMENT_ COLLECTION.REQUEST_PAYMENT_STATUS.xml | Yes |
| ON_LIABILITY_ TRANSFER | modifyOrder_dbd.txt | YFS_PAYMENT_ COLLECTION.ON_ LIABILITY_ TRANSFER.xml | Yes |
| ON_INVOICE_ COLLECTION | order_ dbd/txt | YFS_CREATE_ORDER_ INVOICE.ON_INVOICE_ COLLECTION.xml | Yes |

## A.3.24 Payment Execution

This transaction processes all requests that are pending authorization and charging.

**Note:** Use this time-triggered transaction for processing all authorization and charge requests.

This transaction requires interfacing with a product that provides financial services.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–79 Payment Execution Attributes for Sales Orders***

| Attribute | Value |
|---|---|
| Base Transaction ID | PAYMENT_EXECUTION |
| Base Document Type | Order |
| Base Process Type | Order Fulfillment |
| Abstract Transaction | No |
| APIs Called | `executeCollection()` |
| User Exits Called | collectionCreditCard, collectionOthers, collectionCustomerAcct |

***Table A–80 Payment Execution Attributes for Return Orders***

| Attribute | Value |
|---|---|
| Base Transaction ID | PAYMENT_EXECUTION.0003 |
| Base Document Type | Order |
| Base Process Type | Reverse Logistics |
| Abstract Transaction | No |
| APIs Called | `executeCollection()` |
| User Exits Called | collectionCreditCard, collectionOthers, collectionCustomerAcct |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–81 Payment Execution Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| ChargeType | Type of credit card process. Valid values are:<br>• AUTHORIZATION - Validates the credit card account<br>• CHARGE - Applies the charge to the credit card |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–82 Payment Execution Statistics***

| Statistic Name | Description |
|---|---|
| NumAuthTransProcessed | Number of authorization transaction processed. |
| NumAuthTransSuccessfullyProcessed | Number of successful returns from user exit for authorization transaction processed. |
| NumChargeTransProcessed | Number of charge transaction processed. |
| NumChargeTransSuccessfullyProcessed | Number of successful returns from user exit for charge transaction processed. |

*Table A–82 Payment Execution Statistics*

| Statistic Name | Description |
|---|---|
| NumCollectionValidations | Number of successful returns from the invoked validate collection user exits. |
| NumCreditCardCollections | Number of credit card collections. |
| NumCustomerAccountCollections | Number of successful returns from the customer account collection user exits. |
| NumOtherCollections | Number of successful returns from the other collection user exits. |

### Pending Job Count

For this transaction the pending job count is the number of open charge and authorization transactions.

### Events Raised

The following events are raised by this time-triggered transaction:

*Table A–83 Events Raised by Payment Execution Transaction*

| Transaction/Event | Key Data | Data Published | Template Support? |
|---|---|---|---|
| CHARGE_FAILED | modifyOrder dbd.txt | PAYMENT_EXECUTION_ CHARGE_FAILED_ dbd.txt | No |

This transaction raises events as specified under the `executeCollection()` API in the *Selling and Fulfillment Foundation: Javadocs*.

## A.3.25 Post Inventory Match

This transaction processes all open records in YFS_INVENTORY_MATCH table and posts the records to a financial system. An open record in the YFS_INVENTORY_MATCH table has the status of `01`. After posting, the status is changed to `02`.

Use this transaction if any of the configured ship nodes maintain inventory cost.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–84 Post Inventory Match Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | POST_INVENTORY_MATCH |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–85 Post Inventory Match Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| ColonyID | Required in a multischema deployment where the YFS_INVENTORY_MATCH table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–86 Post Inventory Match Statistics***

| Statistic Name | Description |
|---|---|
| NumInventoryMatchPosted | Number of inventory match records posted. |

### Pending Job Count

For this transaction the pending job count is the number of inventory matches with an open status.

### Events Raised

The following events are raised by this time-triggered transaction:

***Table A–87 Events Raised by the Post Inventory Match Transaction***

| Transaction/Event | Key Data | Data Published | Template Support? |
|---|---|---|---|
| POST_INVENTORY_MATCH | POST_INVENTORY_MATCH_dbd.txt | YFS_postInventoryMatch_output.xml | No |

## A.3.26 Process Order Hold Type

You can create a time-triggered transaction, derived from the PROCESS_ORDER_HOLD_TYPE abstract transaction. It can be configured as the processing transaction for one or more hold types. If an order is associated with a hold type that has a transaction configured as the processing transaction, a record is created in the YFS_TASK_Q table for processing that transaction.

When the processing transaction is triggered, it checks the hold types that it can process based on the hold type configuration. If no hold types can be processed, the YFS_TASK_Q record is deleted. If some hold types can be processed, the processOrderHoldType user exit is invoked with the list of hold types to be processed. The processOrderHoldType user exit returns the list of hold types that can be removed from the order.

The transaction then modifies the order and updates the order hold type list based on the output returned by the processOrderHoldType user exit. If now no hold types can be processed, the YFS_TASK_Q record is deleted. If some hold types can still be processed, YFS_TASK_Q is updated with the next available date.

You can also call the processOrderHoldType user exit to add new hold types or change the status of a hold type that is already applied to an order. For more information about the processOrderHoldType user exit, see the *Selling and Fulfillment Foundation: Javadocs*.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–88 Process Order Hold Type Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | PROCESS_ORDER_HOLD_TYPE |
| Base Document Type | Order |
| Base Process Type | Order Fulfillment |
| Abstract Transaction | Yes |
| APIs Called | changeOrder |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–89 Process Order Hold Type Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |

*Table A–89 Process Order Hold Type Parameters*

| Parameter | Description |
|---|---|
| Next Task Queue Interval | Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours. |
| ColonyID | Required in a multischema deployment where the YFS_TASK_Q table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

None.

## Pending Job Count

None

## Events Raised

The following events are raised by this time-triggered transaction:

*Table A–90 Events Raised by Process Order Hold Type Transaction*

| Transaction/Event | Raised when... | Key Data | Data Published | Template Support? |
|---|---|---|---|---|
| ON_SUCCESS | On success | modifyOrder_dbd.txt | YFS_ORDER_CHANGE.ON_SUCCESS.xml | Yes * |
| ON_HOLD_TYPE_STATUS_CHANGE | The status of a hold type is changed. | modifyOrder_dbd.txt | YFS_ON_HOLD_TYPE_STATUS_CHANGE.xml | Yes |

*Table A–90 Events Raised by Process Order Hold Type Transaction*

| Transaction / Event | Raised when... | Key Data | Data Published | Template Support? |
|---|---|---|---|---|
| ON_ORDER_LINE_HOLD_TYPE_STATUS_CHANGE | The status of a hold type is changed. | modifyOrder_dbd.txt | YFS_ON_ORDER_LINE_HOLD_TYPE_STATUS_CHANGE.xml | Yes |
| *** Note**: Some of the elements and attributes are not template-driven. Refer to the xml for element level details. | | | | |

## A.3.27 Process Work Order Hold Type

This time-triggered transaction is identical to the Process Order Hold Type transaction, but it is used for work orders instead.

### Attributes

The following are the attributes for this time-triggered transaction:

*Table A–91 Process Work Order Hold Type Attributes*

| Attribute | Value |
|---|---|
| Base Transaction ID | PROCESS_WO_ORDER_HOLD_TYPE |
| Base Document Type | Work Order |
| Base Process Type | VAS Process |
| Abstract Transaction | Yes |
| APIs Called | `modifyWorkOrder` |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–92 Process Work Order Hold Type Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Next Task Queue Interval | Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

None.

## Pending Job Count

None

### Events Raised

The following events are raised by this time-triggered transaction:

***Table A–93 Events Raised by Process Work Order Hold Type Transaction***

| Transaction / Event | Raised when... | Key Data | Data Published | Template Support? |
|---|---|---|---|---|
| ON_SUCCESS | On success | workOrder_dbd.txt | VAS_MODIFY_WORK_ORDER.ON_SUCCESS.xml | Yes * |
| ON_HOLD_TYPE_STATUS_CHANGE | The status of a hold type is changed. | workOrder_dbd.txt | VAS_ON_HOLD_TYPE_STATUS_CHANGE.xml | Yes |
| * **Note**: Some of the elements and attributes are not template driven. Refer to the xml for elements level details. | | | | |

## A.3.28 Publish Negotiation Results

This transaction publishes the negotiated terms to the order.

Use this transaction in environments where an order must go through a negotiation phase.

> **Note:** This transaction needs to be run after negotiation is completed.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–94 Publish Negotiation Results Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | PUBLISH_ORD_NEGOTIATION |
| Base Document Type | Order |
| Base Process Type | Order Negotiation |

*Table A–94 Publish Negotiation Results Attributes*

| Attribute | Value |
|---|---|
| Abstract Transaction | No |
| APIs Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

*Table A–95 Publish Negotiation Results Criteria Parameters*

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Next Task Queue Interval | Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–96 Publish Negotiation Results Statistics*

| Statistic Name | Description |
|---|---|
| NumNegotiationsProcessed | Number of negotiations processed. |
| NumNegotiationsPublished | Number of negotiations published. |

## Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table.

### Events Raised

The following events are raised by this time-triggered transaction:

***Table A–97 Events Raised by Publish Negotiation Results Transaction***

| Base Transaction | Raised when... | Key Data | Data Published | Template Support? |
|---|---|---|---|---|
| PUBLISH_ ORD_ NEGOTIATION/ ON_SUCCESS | On success | Negotiation _dbd.txt | YCP_ getNegotiatio nDetails_ output.xml | Yes * |
| RECEIVE_ ORD_ NEGOTIATION/ ON_SUCCESS | On success, when DocumentTyp e is 0001, EntityType is ORDER. | Number of concurrent time-trigger ed transactions running. | receiveOrder Negotiation_ dbd.txt | No |
| * **Note**: Template used for this event is the same template used by the `getNegotiationDetails()` API to form the output XML. | | | | |

## A.3.29 Release

This transaction releases orders to specific ship nodes, making sure that the scheduled ship nodes have enough inventory to process the order.

This transaction should be invoked after the scheduling process.

For more details, see the information provided under the `releaseOrder()` API in the *Selling and Fulfillment Foundation: Javadocs*.

> **Important:** Sterling Commerce recommends that if you run the combined 'Schedule and Release' agent, you do not also run the individual Schedule or the individual Release agents.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–98 Release Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | RELEASE |
| Base Document Type | Order |
| Base Process Type | Order Fulfillment |
| APIs Called | `releaseOrder()` |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–99 Release Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| IgnoreReleaseDate | Optional. Determines whether the schedule process should ignore line release date criteria. Valid values are:<br>• Y - Releases line quantities regardless of release date criteria<br>• N - Default value. Releases line quantities only after release date criteria have been met. |
| CheckInventory | Optional. Determine whether inventory should be checked. Valid values are:<br>• Y - Default value. Inventory needs to be checked.<br>• N - Inventory does not need to be checked. |

*Table A–99 Release Criteria Parameters*

| Parameter | Description |
|---|---|
| Next Task Queue Interval | Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–100 Release Criteria Statistics*

| Statistic Name | Description |
|---|---|
| NumFutureDateFailures | Number of orders did not attempt to release because of future date failures. |
| NumOrdersAttempted | Number of orders attempted to release. |
| NumOrdersCannotBeProcessedFailures | Number of orders did not attempt to release because of cannot be processed failures. |
| NumOrdersProcessed | Number of orders processed. |
| NumOrdersReleased | Number of orders released. |
| NumOrdersBackordered | Number of orders backordered. |
| NumOrderLinesReleased | Number of order lines released. |
| NumOrderLinesBackordered | Number of order lines backordered. |
| NumReleasesCreated | Number of order releases created. |
| NumOrdersCannotBeProcessedFailures | Number of orders that were not released due to process failure. |

**Note:** If the release process results in splitting of an order line, NumOrderLinesReleased, NumOrderLinesBackordered, and NumOfReleasesCreated may result in more than one count.

### Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table, [DOM71-06]if tasks on hold are not ready to be processed.[/DOM71-06]

### Events Raised

This transaction raises events as specified under the `releaseOrder()` API in the *Selling and Fulfillment Foundation: Javadocs*.

## A.3.30 Route Shipment

This time-triggered transaction is used to route shipments and belongs to the Outbound Shipment pipeline. It assigns the Carrier and Carrier Service codes for the shipment based on the Routing Guide configured.

The Route Shipment transaction either includes shipments in an existing load or creates a new load and includes the shipments in it.

Shipments can be consolidated to a load, only if the following conditions are met:

- Expected Ship Date - The expected ship date of the shipments must be less than or equal to the must ship before date of the load.
- Expected Load Departure Date - The expected load departure date must be less than or equal to the must ship before date of the shipments in the load.

  The must ship before date is a date computed for the load, based on all shipments present in the load. For example, if a load has three shipments with their must ship before dates as 12.22.2005, 12.12.2005, and 12.19.2005 respectively, then the must ship before date of the load is computed as 12.12.2005, as it is the earliest of the three dates.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–101 Route Shipment***

| Attribute | Value |
|---|---|
| Base Transaction ID | ROUTE_SHIPMENT.0001 |
| Base Document Type | Order |
| Base Process Type | ORDER_DELIVERY |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | `com.yantra.ydm.japi.ue.YDMOverrideDetermineRoutingUE`<br>`com.yantra.ydm.japi.ue.YDMBeforeDetermineRoutingUE` |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–102 Route Shipment Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Next Task Queue Interval | Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours. |

*Table A–102 Route Shipment Criteria Parameters*

| Parameter | Description |
|---|---|
| ColonyID | Required in a multischema deployment where YFS_SHIPMENT table may exist in multiple schemas. Runs the agent for the colony. |
| CollectPendingJobs | If this parameter is set to N, the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the System Management Console. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–103 Route Shipment Statistics*

| Statistic Name | Description |
|---|---|
| NumRouted | Number of shipments routed. |

## Pending Job Count

For this transaction the pending job count is the number of records representing the unheld orders that are available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table.

## Events Raised

The following events are raised by this time-triggered transaction:

*Table A–104 Events Raised by the Route Shipment Transaction*

| Transaction/Event | Key Data | Data Published | Template Support? |
|---|---|---|---|
| ON_SUCCESS | shipment_dbd.txt | YDM_ROUTE_SHIPMENT.ON_SUCCESS.xml | Yes |
| ON_FAILURE | shipment_dbd.txt | YDM_ROUTE_SHIPMENT.ON_FAILURE.xml | Yes |

However, note that the template name would read <TransactionId>.ON_SUCCESS.xml. The XML and DTD depicted above represent the output that the abstract transaction ROUTE_SHIPMENT transaction is capable of generating.

## A.3.31 Schedule

This transaction schedules orders to specific ship nodes making sure that the scheduled ship nodes have enough inventory to process the order.

Run this transaction after order creation.

**Important:** It is recommended not to run the individual Schedule or Release agents when running the combined "Schedule and Release" agent.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–105 Schedule Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | SCHEDULE |
| Base Document Type | Order |
| Base Process Type | Order Fulfillment |
| APIs Called | `scheduleOrder()` |

### Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–106 Schedule Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |

*Table A–106 Schedule Criteria Parameters*

| Parameter | Description |
|---|---|
| OptimizationType | Optional. Determines the optimization rules to apply to the scheduling process. Valid values are:<br>• 01 - Optimize on date (Default)<br>• 02 - Optimize on ship node priority<br>• 03 - Optimize on number of shipments |
| OrderFilter | Optional. Determines the types of orders to filter. Possible values are:<br>• A - All orders (Default)<br>• B - Backorders only<br>• N - New orders only |
| ScheduleAndRelease | Optional. Notify the schedule process to release all releasable line quantities. Valid values are:<br>• Y - Releases successfully scheduled line quantities.<br>• N - Default value. Only schedules line quantities.<br>**Note:** Enabling this parameter does not validate hold types configured for the release transaction. |
| IgnoreReleaseDate | Optional. Determines whether the schedule process should ignore line release date criteria. Valid values are:<br>• Y - Releases line quantities regardless of release date criteria.<br>• N - Releases lines quantities only after release date criteria have been met. Default. |
| Next Task Queue Interval | Not used. This agent updates a failed task so that it is suspended for the back order retry interval setup in the appropriately scheduled rule. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–107 Schedule Statistics***

| Statistic Name | Description |
|---|---|
| NumFutureDateFailures | Number of orders that Selling and Fulfillment Foundation did not attempt to schedule because of future date failures.<br>Failures can be caused by any of the following:<br>• If the OrderFilter is “B” (Backorders Only) and there are no backordered or unscheduled lines.<br>• If the OrderFilter is “N” (New orders Only) and there are some backordered or unscheduled lines.<br>• If order has order lines within only backordered or unscheduled status and the status modify timestamp is after the current time - the back order wait period specified in the scheduling rule. |
| NumOrdersAttempted | Number of orders attempted to schedule. This statistic does not include the values for NumFutureDateFailures and NumOrdersCannotBeProcessedFailures statistics. |
| NumOrderLinesReleased | Number of order lines that have been released. |

*Table A–107 Schedule Statistics*

| Statistic Name | Description |
|---|---|
| NumOrdersCannotBeProcessedFailures | Number of orders that Selling and Fulfillment Foundation did not attempt to schedule because of cannot be processed failures.<br>Failures can be caused by any of the following:<br>• The result of the YFSCheckOrderBeforeProcessingUE user exit returns as false.<br>• The Order has the HoldFlag attribute set to 'Y'.<br>• The Order has the SaleVoided attribute set to 'Y'.<br>• The Order does not have PaymentStatus as AUTHORIZED, INVOICED, PAID, nor NOT_APPLICABLE. |
| NumOrdersCreated | Number of orders created. This also includes the number of procurement orders created. |
| NumOrderLinesCreated | Number of order lines created. |
| NumOrdersProcessed | Number of orders processed. |
| NumOrdersScheduled | Number of orders that have at least one line that was scheduled.<br>**Note:** This includes scheduled lines in any status except BACKORDER. |
| NumOrdersProcOrdersCreated | Number of procurement orders created. |
| NumWorkOrdersCreated | Number of work orders created. |
| NumOrdersBackordered | Number of orders backordered. |
| NumOrderLinesScheduled | Number of order lines scheduled. |
| NumOrderLinesBackordered | Number of order lines backordered. |
| NumReleasesCreated | Number of order releases created. |

### Pending Job Count

For this transaction the pending job count is the number of records representing the unheld orders that are available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table, [DOM71-06]if tasks on hold are not ready to be processed.[/DOM71-06]

### Events Raised

This transaction raises events as specified under the `scheduleOrder()` API in the *Selling and Fulfillment Foundation: Javadocs*.

### Providing Oracle Hints

You can provide Oracle Hints to increase the performance of the scheduleOrder agent. The two hints that can be provided for each criteria ID of the scheduleOrder agent are the Outer Hint and the Inner Hint. The Outer Hint is always used for the YFS_TASK_Q table. The Inner Hint is used for the YFS_ORDER_HEADER table only if the earlier hold functionality is used; otherwise, the Inner Hint is used for the YFS_ ORDER_RELEASE_STATUS table.

Insert the following entries in the `yfs.properties` file in order to enable Oracle Hints:

1. Edit the <INSTALL_DIR>/properties/yfs.properties file.
2. Insert `yfs.<agent_criteria_id>.getjobs.hint.outer=/*+ parallel(YFS_TASK_Q 8) full(yfs_task_q) */`

   Insert `yfs.<agent_criteria_id>.getjobs.hint.inner=/*+ NL_SJ */`

## A.3.32 Send Invoice

This transaction publishes invoice data that can be directed to an external accounts receivable system.

In environments that require an interface with accounts receivable systems, this transaction needs to be scheduled. This transaction raises

an event for an invoice based on the following configuration at the following times in the order lifecycle:

- Publish invoice at shipment creation - This implies that your accounts payable system takes care of payment collection. Invoices can be published as soon as they are created.
- Publish invoice after payment collection - This implies that the Console take care of the payment collection. When payment is in the AT_COLLECT status and the payment is not from an external system, an invoice is published only if the entire payment amount is collected. If the payment is in the AT_CREATE status or the payment is from an external system, the invoice is published unconditionally.

**Note:** Many of this transaction's elements and attributes are template driven. Refer to the XML for element level details.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–108 Send Invoice Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | SEND_INVOICE |
| Base Document Type | Order |
| Base Process Type | Order Fulfillment |
| Abstract Transaction | No |
| APIs Called | `getOrderInvoiceDetails()` |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–109 Send Invoice Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–110 Send Invoice Statistics***

| Statistic Name | Description |
|---|---|
| NumInvoicesSent | Number of invoices sent. |

## Pending Job Count

For this transaction the pending job count is the number of order invoices in created (“00”) status.

## Events Raised

The following events are raised by this time-triggered transaction:

***Table A–111 Events Raised by the Send Invoice Transaction***

| Transaction/Event | Key Data | Data Published | Template Support? |
|---|---|---|---|
| PUBLISH_INVOICE_DETAIL | modifyOrder_dbd.txt and sendInvoice_dbd.txt | YFS_getOrderInvoiceDetails_output.xml | Yes |

Additional events may be raised by the `getOrderInvoiceDetails()` API. For detailed information about the events, see the details provided under this API in the *Selling and Fulfillment Foundation: Javadocs*.

## A.3.33 Send Item Changes

In integrated environments, this transaction publishes item data changes that are directed to an external system.

When item changes occur in Selling and Fulfillment Foundation, they need to be communicated to the external system.

The business process may require the synchronization of items all at once in a batch. For example, at the end of each business day, the sendItemChanges agent can be configured to synchronize items based on the synchronization logic. This transaction retrieves all items that are not logical kit or dynamic physical kit items and whose SyncTS is null or MaxModifyTS is greater than the SyncTS.

> **Note:** The MaxModifyTS of an item is updated with the current timestamp whenever an item is modified. The transaction then retrieves detailed information about those items and raises the ON_SUCCESS event. This event should be configured to invoke the Send Item Changes action.

For more information about how this integration is implemented, see the *Selling and Fulfillment Foundation: Integration Guide*.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–112 Send Item Changes Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | SEND_ITEM_CHANGES |
| Base Document Type | None |
| Base Process Type | General |

*Table A–112 Send Item Changes Attributes*

| Attribute | Value |
|---|---|
| Abstract Transaction | No |
| APIs Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

*Table A–113 Send Item Changes Criteria Parameters*

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Organization Code | Optional. The organization from which items are synchronized. This field is blank by default. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

None.

## Pending Job Count

For this transaction the pending job count is the number of items requiring synchronization. This is determined for product items that are not logical kit or dynamic physical kit items and whose SyncTS is null or MaxModifyTS is greater than the SyncTS.

### Events Raised

The following events are raised by this time-triggered transaction:

***Table A–114 Events Raised by the Send Item Changes Transaction***

| Transaction/Event | Key Data | Data Published | Template Support? |
|---|---|---|---|
| ON_SUCCESS | None | YCM_SEND_ITEM_CHANGES_ON_SUCCESS.XML | Yes |

## A.3.34 Send Customer Changes

In integrated environments, this transaction publishes customer data changes that are directed to an external system.

When customer changes occur in Selling and Fulfillment Foundation, they need to be communicated to the external system.

The business process may require the synchronization of customers all at once in a batch. For example, at the end of each business day, the sendItemChanges agent can be configured to synchronize items based on the synchronization logic. This transaction retrieves all customers that are consumers, have a user ID present, and are required to synchronize. This transaction can also be used to complete the initial synchronization of users between the two systems. For example, if an external system is already in place, and Selling and Fulfillment Foundation is then added, the SendCustomerChanges agent synchronizes the users from the external system.

The sendCustomerChanges agent also serves as a backup mechanism. If a customer synchronization event fails, the agent automatically retries the synchronization after a specified amount of time.

**Note:** The MaxModifyTS of an customer is updated with the current timestamp whenever an customer is modified, whenever syncTS is less than MaxModifyTS, or when syncTS is null. The transaction then retrieves detailed information about those customers and raises the ON_SUCCESS event. This event should be configured to invoke the Send Customer Changes action.

For more information about how this integration is implemented, see the *Selling and Fulfillment Foundation: Integration Guide*.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–115 Send Customer Changes Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | SEND_CUSTOMER_CHANGES |
| Base Document Type | None |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–116 Send Customer Changes Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Organization Code | Optional. The organization from which customers are synchronized. This field is blank by default. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

None.

### Pending Job Count

For this transaction the pending job count is the number of customers requiring synchronization. This is determined for customers that are consumers, have a user ID present, and are required to synchronize.

### Events Raised

The following events are raised by this time-triggered transaction:

***Table A–117 Events Raised by the Send Customer Changes Transaction***

| Transaction/Event | Key Data | Data Published | Template Support? |
|---|---|---|---|
| SEND_CUSTOMER_CHANGES.ON_SUCCESS | None | YSC_SEND_CUSTOMER_CHANGES.ON_SUCCESS.XML | Yes |

## A.3.35 Send Order

This transaction tries to raise the ON_SUCCESS event for an order whose OrderHeaderKey is stored in the task queue object. The event is raised only if all of the order lines of the order reach particular status(es) completely. That is, the entire ORDERED_QTY of each line must be in the particular status(es). In addition to raising the event, the line statuses are also changed to the drop statuses, corresponding to the pickup statuses. The SendOrder transaction, derived from the abstract transaction SEND_ORDER, should have the event, pickup, and drop statuses configured. For more information, see the details provided under the `sendOrder()` API in the *Selling and Fulfillment Foundation: Javadocs*.

If an order needs to be communicated to a third party, use this transaction.

**Note:** The TransactionKey posted in the task object must be an instance of the Abstract Transaction SEND_ORDER for the ProcessType associated with the Order. Otherwise, an exception is thrown.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–118 Send Order Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | SEND_ORDER |
| Base Document Type | Order |
| Base Process Type | Order Fulfillment |
| Abstract Transaction | Yes |
| APIs Called | `sendOrder()` |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–119 Send Order Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Next Task Queue Interval | Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

None.

## Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE

value less than or equal to (<=) the current date value in the YFS_Task_Q table.

### Events Raised

This transaction raises events as specified under the `sendOrder()` API in the *Selling and Fulfillment Foundation: Javadocs*.

## A.3.36 Send Release

The Send Release Agent dispatches releases to ship nodes.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–120 Send Release Attributes***

| Attribute | Value |
|---|---|
| Transaction Name | Send Release |
| Transaction ID | SHIP_ADVICE |
| Base Process Type | Order Fulfillment |
| Abstract Transaction | No |
| APIs Called | com.yantra.yfs.agent.YFSWMSShipAdviceAgent |

### Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–121 Send Release Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |

*Table A–121 Send Release Criteria Parameters*

| Parameter | Description |
|---|---|
| Next Task Queue Interval | Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–122 Send Release Statistics*

| Statistic Name | Description |
|---|---|
| NumReleasesProcessed | Number of order releases processed. |
| NumReleasesSent | Number of order releases sent. |

## Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table.

## Events Raised

The following events are raised by this time-triggered transaction:

*Table A–123 Events Raised by the Send Release Transaction*

| Transaction/Event | Data Published |
|---|---|
| PUBLISH_SHIP_ADVICE | YFS_publishShipAdvice_output.xml |

## A.3.37 Start Order Negotiation

This transaction creates the negotiations for orders that are configured to go through the negotiation process.

Use this transaction in environments where an Order needs to go through a Negotiation phase before it is released.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–124 Start Order Negotiation Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | START_ORD_NEGOTIATION |
| Base Document Type | Order |
| Base Process Type | Order Fulfillment |
| Abstract Transaction | No |
| APIs Called | `createNegotiation()` |
| User Exits Called | YCPBeforeCreateNegotiationUE, YCPGetNegotiationNoUE |

### Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–125 Start Order Negotiation Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Next Task Queue Interval | Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours. |

*Table A–125 Start Order Negotiation Criteria Parameters*

| Parameter | Description |
|---|---|
| Node | Required. The warehouse management ship node for which records are being processed. |
| ColonyID | Required in a multischema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–126 Start Order Negotiation Statistics*

| Statistic Name | Description |
|---|---|
| NumOrdersProcessed | Number of orders processed. |
| NumNegotiationsCreated | Number of negotiations created. |

### Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table.

### Events Raised

This transaction raises events as specified under the `createNegotiation()` API in the *Selling and Fulfillment Foundation: Javadocs*.

## A.3.38 Synchronize Colony Map

The Colony Map Synchronizer agent inserts or updates colony mappings of organizations and users in the PLT_COLONY_MAP table. When you run the agent for the first time, it populates this table, which is a necessary step in upgrading to multischema mode after installing or upgrading Selling and Fulfillment Foundation.

For more information about upgrading to multischema mode, see the *Platform Enterprise Onboarding for Multi-Tenancy Guide*.

## Attributes

The following are attributes for this time-triggered transaction:

***Table A–127 Colony Map Synchronizer Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | COLONY_MAP_SYNC |
| Base Process Type | General |
| Abstract Transaction | No |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–128 Colony Map Synchronizer Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records to Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| ColonyID | The colony to be synchronized.<br>Initially, you must run the agent on the DEFAULT colony provided by the Selling and Fulfillment Foundation installation so that it populates the PLT_COLONY_MAP table. After this, you can run the agent on another ColonyID. |
| InsertDefaultMappings | If set to Y, users for which the colony cannot be determined will be mapped to the colony for which the Colony Map Synchronizer agent is run. |

## Statistics Tracked

None.

### Pending Job Count

None.

### Events Raised

None.

### Tables Purged

None.

## A.3.39 Update Best Match Region

The Update Best Match Region transaction manages the YFS_REGION_BEST_MATCH table, which is used by Data Warehouse Analytics to report best match region data. The best match region is defined by the following five address attributes in person info records:

- ADDRESS_LINE6
- CITY
- STATE
- SHORT_ZIP_CODE
- COUNTRY

The agent for the Update Best Match Region transaction runs in two modes that allow you to set up and update the YFS_REGION_BEST_MATCH table.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–129 Update Best Match Region Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | UPDATE_BEST_MATCH_REGION |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |

*Table A–129 Update Best Match Region Attributes*

| Attribute | Value |
|---|---|
| APIs Called | None |
| User Exits Called | YSCGetShortZipCode UE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

*Table A–130 Update Best Match Region Criteria Parameters*

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If UpdateOnly = N, only distinct records are returned per agent call. If left blank, it defaults to 1000. |
| TableType | Required in a multischema deployment when YFS_Person_Info table may exist in multiple schemas.<br>Valid Values: CONFIGURATION, TRANSACTION, MASTER.<br>If set to CONFIGURATION, the agent runs for the YFS_Person_Info records associated with tables that have TableType as CONFIGURATION; for example, YFS_Organization, YFS_Ship_Node, and so forth.<br>If set to TRANSACTION, the agent runs for the YFS_Person_Info records associated with tables that have TableType as TRANSACTION; for example, YFS_Order_Header, YFS_Shipment, and so forth.<br>Note that the agent would run for all TableTypes that exist in the same schema as the one passed. For example, if set to TRANSACTION, the agent would also run for YFS_Person_Info records associated with tables that have TableType as MASTER, since they reside in the same schema. |

*Table A–130 Update Best Match Region Criteria Parameters*

| Parameter | Description |
|---|---|
| ColonyID | Required in a multi schema deployment where the YFS_PERSON_INFO table may exist in multiple schemas. Runs the agent for the colony. |
| UpdateOnly | Mode in which to run. Valid values are:<br>• N - Default value. Adds records from the YFS_PERSON_INFO table to the YFS_REGION_BEST_MATCH table and populates the region key in the YFS_BEST_MATCH table. To perform the initial setup of Best Match Region for Analytics, set UpdateOnly to N.<br>• Y - Update mode. Updates region keys based on addresses in YFS_REGION_BEST_MATCH. After performing the initial setup of Best Match Region for Analytics, set this value to Y to specify update mode. |
| LastPersonInfoKey | Optional. If UpdateOnly is set to N, LastPersonInfoKey determines the first person info record to populate. If no key is specified, the value defaults to Null. |
| LastRegionBest MatchKey | Optional. If UpdateOnly is set to Y, LastRegionBestMatchKey determines the first region best match key to update. If no key is specified, the value defaults to Null. |

## Statistics Tracked

None.

## Pending Job Count

None.

## Events Raised

None.

### Tables Purged

None.

## A.3.40 PopulateOwnershipTransferSummary

This method updates the YFS_OWNERSHIP_TRANSFER_SUMMARY table.

This transaction updates the YFS_OWNERSHIP_TRANSFER_SUMMARY table by checking the records in YFS_INV_OWN_TRANSFER_RCD table.

It also updates the IS_STATISTICS_UPDATED to 'Y' in YFS_INV_OWN_TRANSFER_RCD table after the record has been used by the transaction.

### Attributes

Following are the attributes for this time-triggered transaction:

***Table A–131 YFSPopulateOwnershipTransfer Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | POPULATE_OWN_TRANS_SUMM |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |

### Criteria Parameters

Following are the criteria parameters for this transaction:

***Table A–132 YFSPopulateOwnershipTransfer Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, which is the only valid value. |

*Table A–132 YFSPopulateOwnershipTransfer Criteria Parameters*

| Parameter | Description |
|---|---|
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| ColonyID | Required in a multi schema deployment where the YFS_OWNERSHIP_TRANSFER_SUMMARY and YFS_INV_OWN_TRANSFER_RCD tables may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

None

### Pending Job Count

None

### Events Raised

None

## A.4 Time-Triggered Purge Transactions

There are several transactions that you can use to purge your database tables at specific time intervals.

Purge transactions determine when a table should be purged by determining the current date and subtracting the retention days specified by the purge. If the timestamp on the table is less than or equal to (current day - retention days) the table is purged.

**Note:** In some cases, a purge may look at another field other than the table's timestamp. These are pointed out in the documentation.

**Note:** When an entity is being purged, the related or dependent information that is present in other tables should be taken into consideration for purging along with it. For example, if a sales order with live shipments is being purged, any cross reference to that order is not accurate in the Order Shipment Console.

**Note:** Some of the statistics collected and tracked in Release 9.0 for time-triggered transactions, monitors, and integration and application servers may change with the next release of Selling and Fulfillment Foundation.

**Note:** All Time-Triggered Purge Transactions have a `CollectPendingJobs` criteria parameter. If this parameter is set to `N`, the agent does not collect information on the pending jobs for that time-triggered transaction. This pending job information is used for monitoring the monitor in the System Management Console.

By default, `CollectPendingJobs` is set to `Y`. It can be helpful to set it to `N` if one particular time-triggered transaction is performing a significant amount of `getPendingJobs` queries, and the overhead cost is too high.

## A.4.1 Purge Strategy

The following recommendations should be taken into consideration when planning a purge strategy for each purge transaction:

- Test purges by setting Live to 'N'.
- Turn on logging to test what is purged.
- Set up purge traces in the System Management Console and analyze the information.

## A.4.2 Configuring Purge Transaction Log Files

You can configure purges to write log files to a directory you specify. Each time you run a particular purge, new data is appended to this file. If no file exists, one is created.

To specify a purge log file directory:

1. Configure the `yfs.purge.path` property in the `<INSTALL_DIR>/properties/customer_overrides.properties` file. For example, on UNIX you might specify the log files to be written to the `/app/yfs/logs/purges` directory.

   For additional information about overriding properties using the `customer_overrides.properties` file, see the *Selling and Fulfillment Foundation: Properties Guide*.

2. Run the `<INSTALL_DIR>/bin/setupfiles.sh` script on UNIX, or the `<INSTALL_DIR>/bin/setupfiles.cmd` script on Windows.

## A.4.3 Available Purges

This section contains details of all purge transactions in alphabetical order. The time-triggered purge transactions are:

- Access Token Purge
- Capacity Purge
- Draft Order History Purge
- Draft Order Purge
- Delivery Plan Purge
- Export Table Purge
- Import Table Purge
- Inventory Audit Purge
- Inventory Purge
- Inventory Supply Temp Purge
- Item Audit Purge
- Load History Purge
- Load Purge

- Negotiation History Purge
- Negotiation Purge
- Opportunity History Purge
- Opportunity Purge
- Order History Purge
- Order Purge
- Order Release Status Purge
- Order Status Audit Purge
- Organization Audit Purge
- Person Info Purge
- Person Info History Purge
- Picklist Purge
- Price List Purge
- Purge Catalog Mass Audits
- Receipt History Purge
- Receipt Purge
- Reprocess Error Purge
- Reservation Purge
- Shipment History Purge
- Shipment Purge
- Shipment Statistics Purge
- User Activity Purge
- User Activity Audit Purge
- Work Order History Purge
- Work Order Purge
- YFS Audit Purge
- YFSInventoryOwnershipAudit Purge
- Password Reset Request Purge

- User Login Failure Purge

### A.4.3.1 Access Token Purge

This purge removes access tokens from the system. If all of the following conditions are met, the PLT_ACCESS_TOKEN table is picked up for purge:

- The access token is expired or is in inactive state.
- The last modified date is earlier than or equal to the current date minus the purge criteria's retention days.

#### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–133 Access Token Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | ACCESSTOKPRG |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | None |

#### Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–134 Access Token Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| CollectPendingJobs | If this parameter is set to N, the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the . |

*Table A–134 Access Token Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–135 Access Token Purge Statistics*

| Statistic Name | Description |
|---|---|
| NumAccessTokenPurged | Number of access token records purged. |

## Pending Job Count

For this transaction the pending job count is the number of records that can be purged from the PLT_ACCESS_TOKEN table.

## Events Raised

None.

## Tables Purged

PLT_ACCESS_TOKEN

### A.4.3.2 Capacity Purge

This purge removes capacity data from the system. This reduces the load on frequently accessed tables.

Any enterprise using the Console must schedule purge transactions.

You can use purge codes pseudo-logic to analyze purges. If the following conditions are met, a capacity data gets picked up for purge:

- All resource pool standard capacity periods with effective to date earlier than or equal to the current date minus the purge criteria's retention days.
- All resource pool overridden capacity with the capacity date earlier than or equal to the current date minus the purge criteria's retention days.
- All resource pool capacity consumption with consumption date less than or equal to the current date minus the purge criteria's retention days.
- All resource pool capacity consumption details where appointment date is earlier than the system date minus the purge criteria's retention days (or ManualReservationPurgeLeadDays for manually created reservations).
- All resource pool capacity consumption details where expiration date has passed and reservation Id is not blank.

#### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–136 Capacity Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | CAPACITYPRG |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |

***Table A–136 Capacity Purge Attributes***

| Attribute | Value |
|---|---|
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–137 Capacity Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–138 Capacity Purge Statistics***

| Statistic Name | Description |
|---|---|
| NumStdCapacityPeriodsPurged | Number of standard capacity periods purged. |
| NumCapacityOverridesPurged | Number of capacity overrides purged. |
| NumCapacityConsumptionsPurged | Number of capacity consumptions purged. |

## Pending Job Count

For this transaction the pending job count is the total number of records that can be purged from the YFS_RES_POOL_STD_CAPCTY_PERD, YFS_RES_POOL_CAPCTY_OVERRIDE, YFS_RES_POOL_CONSMPTN_DTLS and YFS_RES_POOL_CAPCTY_CONSMPTN tables.

## Events Raised

None.

## Tables Purged

The YFS_RES_POOL_STD_CAPCTY_PERD table is purged when EFFECTIVE_TO_DATE <= (CurrentDate - LeadDays)

The YFS_RES_POOL_CAPCTY_OVERRIDE table is purged when CAPACITY_DATE <= (CurrentDate - LeadDays)

The YFS_RES_POOL_CAPCTY_CONSMPTN table is purged when CONSUMPTION_DATE <= (CurrentDate - LeadDays), or if a manual reservation is taken, when CONSUMPTION_DATE <= (CurrentDate - Manual Reservation Retention Days). When this table is purged, YFS_RES_POOL_CONSMPTN_DTLS is also purged.

The YFS_RES_POOL_CONSMPTN_DTLS table is purged when RESERVATION_EXPIRATION_DATE <= (CurrentDate - LeadDays)

### A.4.3.3 Draft Order History Purge

This purge deletes data from history tables after a specified interval, which in turn, reduces the load on frequently accessed tables.

You can use purge codes' pseudo-logic to analyze the purges. If the following condition is met, a draft order is picked up for history purge:

- The last modified date of the draft order exceeds the retention day period.

All the enterprise using the Console must schedule purge transactions.

For more information about Additional Purge Criteria Based on Line Type, see the *Sterling Distributed Order Management: Configuration Guide*.

**Note:** The draft order must be purged and moved to the history tables before you purge the draft order history tables. See Section A.4.3.4, "Draft Order Purge".

**Note:** Selling and Fulfillment Foundation does not provide a transaction for draft order history purges. If you are defining a transaction that purges draft order history tables, refer to the following Criteria Parameters section for information about the transaction criteria.

If you do not want to define your own transaction to purge draft order history tables, you can use the Order Purge transaction and specify DRAFTORDERHISTPRG for the PurgeCode. To configure the Order Purge transaction for draft order history table purges, refer to Section A.4.3.19, "Order Purge" for more information.

## Criteria Parameters

The following are the criteria parameters for defining a draft order history transaction:

***Table A–139 Draft Order History Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| EnterpriseCode | Required. Enterprise for which the Draft Order History Purge has to be run. If not passed, all the enterprises are monitored. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Removes qualifying records from the history tables that are listed in Tables Purged.<br>• N - Test mode. Determines the rows that are removed without actually removing them. |
| PurgeCode | Required. Set to DRAFTORDERHISTPRG. Used for internal calculations, such as determining retention days. Corresponds to the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

None.

## Events Raised

None.

## Tables Purged

YFS_ANSWER_SET_TRAN_H

YFS_ANSWER_TRAN_H

YFS_CHARGE_TRAN_DIST_H

YFS_CHARGE_TRANSACTION_H

YFS_CREDIT_CARD_TRANSACTION_H

YFS_ENTITY_ADDRESS_H

YFS_HEADER_CHARGES_H

YFS_INSTRUCTION_DETAIL_H

YFS_INVOICE_COLLECTION_H

YFS_LINE_CHARGES_H

YFS_NOTES_H

YFS_ORDER_AUDIT_DETAIL_H

YFS_ORDER_AUDIT_H

YFS_ORDER_AUDIT_LEVEL_H

YFS_ORDER_DATE_H

YFS_ORDER_HEADER_H

YFS_ORDER_HOLD_TYPE_H

YFS_ORDER_HOLD_TYPE_LOG_H

YFS_ORDER_INVOICE_DETAIL_H

YFS_ORDER_INVOICE_H

YFS_ORDER_KIT_LINE_H

YFS_ORDER_KIT_LINE_SCHEDULE_H

YFS_ORDER_LINE_H

YFS_ORDER_LINE_OPTION_H

YFS_ORDER_LINE_REQ_TAG_H

YFS_ORDER_LINE_SCHEDULE_H

YFS_ORDER_PROD_SER_ASSOC_H

YFS_ORDER_RELEASE_H

YFS_ORDER_RELEASE_STATUS_H

YFS_ORDER_SER_PROD_ITEM_H

YFS_PAYMENT_H

YFS_PROMOTION_AWARD_H

YFS_PROMOTION_H

YFS_RECEIVING_DISCREPANCY_DTL_H

YFS_RECEIVING_DISCREPANCY_H

YFS_REFERENCE_TABLE_H

YFS_TAX_BREAKUP_H

### A.4.3.4 Draft Order Purge

This purge archives data into history tables after a specified interval, which in turn, reduces the load on frequently accessed tables. For information about purging draft orders from history tables, see Section A.4.3.3, "Draft Order History Purge".

> **NOTE:** Selling and Fulfillment Foundation does not provide a transaction for draft order purges. If you are defining a transaction that purges draft orders, refer to the following Criteria Parameters section for details about the transaction criteria.
>
> If you do not want to define your own transaction to purge draft orders, you can use the Order Purge transaction and specify DRAFTORDERPRG for the PurgeCode. To configure the Order Purge transaction for draft order purges, refer to Section A.4.3.19, "Order Purge" for more information.

All the enterprise using the Console must schedule purge transactions.

Draft orders are picked up by the agent for validation when the following conditions are met:

- Draft order flag is set to Y.
- Modifyts is set for the retention date.

After the draft orders are picked up, each draft order is validated for purging based on the following conditions:

- No eligible order release status records (records with a status larger than zero) exist for the order.
- All the open child orders (derived, chained, return, exchange, or refund fulfillment) for the order are already purged.

If a draft order meets the set of conditions for validation listed earlier, the agent continues to verify the draft orders against the following criteria:

- Contains the Draft Created (1000) status, and all the extended Draft Created statuses.
- Does not have an order release status record that does not meet the retention days.
- The order's last modification should be before the lead time (in days) setup.
- In the case when an exchange order is part of a return order, the exchange order should be purged from history tables before the return order is purged.
- In the case of an order line reservation, the draft order cannot be purged.
- If the Draft Order Payment Processing flag is set to N, the draft orders are purged.
- If the Draft Order Payment Processing flag is set to Y and a charge exists on a draft order, the draft order is not purged. However, authorizations are not considered when validating draft orders for purge.
- For order lines, except service order lines:
  - If the Seller inventory update is required, the Status Inventory Type has the Update Seller Supply option turned on, and the Seller Supply Type is Onhand, or blank. (The Seller Supply Type can also be a custom seller supply type, with the Onhand Supply check box enabled.)
  - If the Seller Demand Type is blank.

– If the Buyer inventory update is required, and the Buyer Supply Type is Onhand, or blank.

## Criteria Parameters

The following are the criteria parameters for defining a draft order purge transaction:

***Table A–140 Draft Order Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Next Task Queue Interval | Optional. Specifies (in hours) how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours. |
| EnterpriseCode | Required. Enterprise for which the Draft Order Purge has to be run. If not passed, all the enterprises are monitored.<br>**Note**: When the EnterpriseCode is blank, the purge criteria configured for the DEFAULT enterprise is used, and not the purge criteria configured for the draft order's enterprise. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged, to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |

*Table A–140 Draft Order Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| PurgeCode | Required. Set to DRAFTORDERPRG. Used for internal calculations, such as determining retention days. Corresponds to the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

None.

## Events Raised

None.

## Tables Purged

YFS_ACTIVITY_DEMAND

YFS_ANSWER_SET_TRAN

YFS_ANSWER_TRAN

YFS_CHARGE_TRANSACTION

YFS_CHARGE_TRAN_DIST

YFS_CREDIT_CARD_TRANSACTION

YFS_ENTITY_ADDRESS

YFS_HEADER_CHARGES

YFS_INSTRUCTION_DETAIL

YFS_INVOICE_COLLECTION

YFS_LINE_CHARGES

YFS_MONITOR_ALERT

YFS_NOTES

YFS_ORDER_AUDIT

YFS_ORDER_AUDIT_DETAIL

YFS_ORDER_AUDIT_LEVEL

YFS_ORDER_HEADER

YFS_ORDER_HOLD_TYPE

YFS_ORDER_HOLD_TYPE_LOG

YFS_ORDER_INVOICE

YFS_ORDER_INVOICE_DETAIL

YFS_ORDER_KIT_LINE

YFS_ORDER_KIT_LINE_SCHEDULE

YFS_ORDER_LINE

YFS_ORDER_LINE_OPTION

YFS_ORDER_LINE_REQ_TAG

YFS_ORDER_LINE_RESERVATION

YFS_ORDER_LINE_SCHEDULE

YFS_ORDER_LINE_SRC_CNTRL

YFS_ORDER_PROD_SER_ASSOC

YFS_ORDER_RELEASE

YFS_ORDER_RELEASE_STATUS

YFS_ORDER_SER_PROD_ITEM

YFS_ORDER_DATE

YFS_PAYMENT

YFS_PMNT_TRANS_ERROR

YFS_PROMOTION

YFS_PROMOTION_AWARD

YFS_RECEIVING_DISCREPANCY

YFS_RECEIVING_DISCREPANCY_DTL

YFS_REFERENCE_TABLE

YFS_TAX_BREAKUP

### A.4.3.5 Delivery Plan Purge

This purge deletes delivery plans after they have completed their typical life-cycle. It purges all the delivery plans that have been marked as ‘Closed’ for a period greater than the retention days specified in the criteria parameters and those that do not have any shipments or loads. The order should have been moved to history before the lead time (in days) setup.

Any enterprise using the Console must schedule purge transactions.

You can use purge codes pseudo-logic to analyze purges. If the following conditions are met, a delivery plan is picked up for purge:

- The delivery plan should be in the "Closed" status.
- The delivery plan should not be associated with any load or shipment.
- All orders associated with the delivery plan should be purged.
- The last modification performed on the delivery plan should fall before the lead time (in days) setup.

**Note:** All the loads and shipments that are associated with the delivery plans should have been purged before running this purge agent.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–141 Delivery Plan Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | DELIVERYPLANPRG |
| Base Document Type | Load |
| Base Process Type | Load Execution |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–142 Delivery Plan Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| EnterpriseCode | Optional. Enterprise for which the Delivery Plan Purge needs to be run. If not passed, then all enterprises are monitored. |

***Table A–142 Delivery Plan Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| BatchDelete | Required. The method by which all records are deleted from the table. Valid values are:<br>• Y - Default value. Records are deleted in batches.<br>• N - Records are deleted one by one. |
| ColonyID | Required in a multi schema deployment where the YFS_DELIVERY_PLAN table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–143 Delivery Plan Purge Statistics***

| Statistic Name | Description |
|---|---|
| NumDeliveryPlansPurged | Number of delivery plans purged. |

### Pending Job Count

For this transaction the pending job count is the number of records that can be purged from the YFS_DELIVERY_PLAN table.

### Events Raised

None.

### Tables Purged

YFS_DELIVERY_PLAN

## A.4.3.6 Export Table Purge

This purge removes export table data from the system. This reduces the load on frequently accessed tables.

You can use purge codes pseudo-logic to analyze purges. If the following conditions are met, the YFS_EXPORT table is picked up for purge:

- YFS_EXPORT records should be marked as processed (Status = 10).
- The last modified time should fall before the lead time (in days) setup.

> **Note:** This purge only reads the rules defined by the hub. Enterprise overridden rules are not considered. This purge should be single threaded when you run it in batch delete mode(BatchDelete=Y).

Any enterprise using the ConsoleConsole must schedule purge transactions.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–144 Export Table Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | EXPORTTBLPRG |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–145 Export Table Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| BatchDelete | Required. The method by which all records are deleted from the table. Valid values are:<br>• Y - Records are deleted in batches.<br>• N - Default value. Records are deleted one by one. |

*Table A–145 Export Table Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| CollectPendingJobs | If this parameter is set to "N", the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the System Management Console. |
| ColonyID | Required in a multi schema deployment where the YFS_EXPORT table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–146 Export Table Purge Statistics*

| Statistic Name | Description |
|---|---|
| NumExportsPurged | Number of exports purged. |

### Pending Job Count

For this transaction the pending job count is the number of records that can be purged from the YFS_Export table.

### Events Raised

None.

### Tables Purged

YFS_EXPORT

## A.4.3.7 Import Table Purge

This purge removes import table data from the system. This reduces the load on frequently accessed tables.

You can use purge codes pseudo-logic to analyze purges. If the following conditions are met, the YFS_IMPORT table is picked up for purge:

- YFS_IMPORT records should be marked as processed (Status = "10").
- The "last modified time" should fall before the lead time (in days) setup.

> **Note:** This purge only reads the rules defined by the hub. Enterprise overridden rules are not considered. This purge should be single threaded when you run it in batch delete mode(BatchDelete=Y).

Any enterprise using the Console must schedule purge transactions.

## Attributes

The following are the attributes for this time-triggered transaction:

Criteria Parameters

***Table A–147 Import Table Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | IMPORTTBLPRG |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

The following are the criteria parameters for this transaction:

***Table A–148 Import Table Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |

***Table A–148 Import Table Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| BatchDelete | Required. The method by which all records are deleted from the table. Valid values are:<br>• Y - Records are deleted in batches.<br>• N - Default value. Records are deleted one by one. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| CollectPendingJobs | If this parameter is set to "N", the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the System Management Console. |
| ColonyID | Required in a multi schema deployment where the YFS_IMPORT table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–149 Import Table Purge Statistics***

| Statistic Name | Description |
|---|---|
| NumImportsPurged | Number of import tables purged. |

### Pending Job Count

For this transaction the pending job count is the number of records that can be purged from the YFS_Import table.

### Events Raised

None.

### Tables Purged

YFS_IMPORT

## A.4.3.8 Inventory Audit Purge

This purge removes inventory audit data from the system. This reduces the load on frequently accessed tables.

Any enterprise using the Console must schedule purge transactions.

All inventory audits of the provided organization with modify timestamp earlier than the current date minus the purge criteria's retention days can be configured to be picked up by the Inventory Audit Purge.

You can use purge codes pseudo-logic to analyze purges. If the following condition is met, an inventory audit record is picked up for purge:

- The inventory audit record's last modification is earlier than the current timestamp minus the retention days.

**Note:** Number of threads for this purge's agent criteria details must be set to 1. For more information about agent criteria, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

**Important:** The Inventory Audit purge does not purge any records under 60 days old, even if configured to do so.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–150 Inventory Audit Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | INVENTORYAUDITPRG |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–151 Inventory Audit Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| EnterpriseCode | Optional. The inventory organization for which the Inventory Audit Purge needs to be run. If not passed, then all enterprises are monitored. |

*Table A–151 Inventory Audit Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Table Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–152 Inventory Audit Statistics*

| Statistic Name | Description |
|---|---|
| NumInventoryAuditsPurged | Number of inventory audits purged. |

## Pending Job Count

For this transaction the pending job count is the number of records that can be purged from the YFS_Inventory_Audit table.

## Events Raised

None.

## Table Purged

YFS_INVENTORY_AUDIT

### A.4.3.9 Inventory Purge

This purge removes inventory data from the system. This reduces the load on frequently accessed tables.This purge does not take retention days into account when purging.

You can use purge codes pseudo-logic to analyze purges.

For YFS_INVENTORY_SUPPLY, if the following conditions are met, an inventory supply is picked up for purge:

- Supply record has the same availability type as the node. For example, TRACK or INFINITE.
- Supply record has 0 quantity.
- Supply record does not contain the supply type “INFO”.

For YFS_INVENTORY_DEMAND, if the following conditions are met, an inventory demand is picked up for purge:

- Demand record has 0 quantity or lesser.
- Demand record does not have demand details as well as matching demand record in YFS_INVENTORY_DEMAND_ADDNL tables.

For YFS_INVENTORY_TAG, it is purged if the INVENTORY_TAG_KEY is not used by any of the existing supply and demand.

For YFS_INVENTORY_RESERVATION, an inventory reservation is picked up for purge if it meets the following conditions:

- Inventory reservation record has 0 quantity or ship date is earlier than the system date minus the purge criteria’s retention days.

For YFS_INVENTORY_NODE_CONTROL, it is purged if the INV_PIC_INCORRECT_TILL_DATE is earlier than the current time stamp minus the purge criteria’s retention days.

For YFS_IBA_TRIGGER, it is purged if IBA_REQUIRED = 'N', IBA_RUN_REQUIRED = 'N', and LAST_IBA_PROCESSED_TS is earlier than the current time stamp minus the purge criteria’s retention days.

Any enterprise using the Console must schedule purge transactions.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–153 Inventory Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | INVENTORYPRG |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–154 Inventory Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |

*Table A–154 Inventory Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–155 Inventory Purge Statistics*

| Statistic Name | Description |
|---|---|
| NumInventoryDemandsPurged | Number of inventory demands purged. |
| NumInventoryNodeControlsPurged | Number of inventory node controls purged. |
| NumInventoryReservationsPurged | Number of inventory reservations purged. |
| NumInventoryTagsPurged | Number of inventory tags purged. |
| NumItemBasedAllocationTriggersPurged | Number of item based allocation triggers purged. |

## Pending Job Count

For this transaction, the pending job count is the total number of records that can be purged from the YFS_Inventory_Supply, YFS_Inventory_Demand, YFS_Inventory_Tag, YFS_Inventory_Reservation, YFS_IBA_Trigger, and YFS_Inventory_Node_Control tables.

## Events Raised

None.

### Tables Purged

YFS_IBA_TRIGGER

YFS_INVENTORY_DEMAND

YFS_INVENTORY_TAG

YFS_INVENTORY_RESERVATION

YFS_INVENTORY_SUPPLY

YFS_INVENTORY_NODE_CONTROL

## A.4.3.10 Inventory Supply Temp Purge

The Inventory Supply Temp purge agent cleans up the contents in the temporary inventory tables generated by the process of synchronizing the Selling and Fulfillment Foundation inventory picture with the actual inventory picture at the nodes.

The node inventory picture is stored during the loading process into the YFS_INVENTORY_SUPPLY_TEMP table. Once the synchronization phase is complete and the YFS_INVENTORY_SUPPLY table has been updated, the YFS_INVENTORY_SUPPLY_TEMP table needs to be purged, which is done through this agent.

For more information about configuring the synchronization with node inventory, see the *Sterling Global Inventory Visibility: Configuration Guide*.

The Inventory Supply Temp purge agent is used to purge all records in the YFS_INVENTORY_SUPPLY_TEMP table whose modify timestamp is less then current time minus the purge criteria's retention days for a group of `YantraMessageGroupID`.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–156 Inventory Supply Temp Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | SUPPLYTEMPPRG |
| Base Document Type | General |
| Base Process Type | General |

*Table A–156 Inventory Supply Temp Purge Attributes*

| Attribute | Value |
|---|---|
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

*Table A–157 Inventory Supply Temp Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| EnterpriseCode | Optional. The inventory organization for which the Inventory Supply Temp Purge needs to be run. If not passed, then all enterprises are monitored.organization. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where the YFS_INVENTORY_SUPPLY_TEMP table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–158 Inventory Supply Temp Purge Statistics***

| Statistic Name | Description |
|---|---|
| NumInventorySupplyTempsPurged | Number of entries in the YFS_INVENTORY_SUPPLY_TEMP table purged. |

### Pending Job Count

Number of unique YantraMessageGroupIDs from YFS_INVENTORY_SUPPLY_TEMP table whose maximum modify timestamp is less than current timestamp minus purge criteria's lead day.

### Events Raised

None.

### Tables Purged

YFS_INVENTORY_SUPPLY_TEMP

## A.4.3.11 Item Audit Purge

This purge removes the YFS_AUDIT table data from the system, which reduces the load on frequently accessed tables. It purges records in the YFS_AUDIT and the YFS_AUDIT_HEADER tables that meet the following conditions:

- YFS_AUDIT records that have ‘modifyts’ greater than the retention days specified and the records have the table name as 'YFS_ITEM'.
- The last modified time is before the lead time (in days) setup.

When the enterprise modifies records in the YFS_ITEM table through the Applications Manager, the YFS_ITEM is audited and the audit records are inserted in the YFS_AUDIT table. In order to clean up the audit records, this purge transaction can be used.

Any enterprise using the Console must schedule purge transactions accordingly.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–159 Item Audit Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | YFS_ITEM_AUDIT_PURGE |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–160 Item Audit Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, the value defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), this value defaults to 5000. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Production mode. Deletes records from the regular tables.<br>• N - Test mode. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where the YFS_AUDIT and YFS_AUDIT_HEADER tables may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–161 Item Audit Purge Statistics***

| Statistic Name | Description |
|---|---|
| NumItemAuditRecordsPurged | Number of item audit records purged. |

### Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_AUDIT table that match the criteria values.

### Events Raised

None.

### Tables Purged

YFS_AUDIT, YFS_AUDIT_HEADER

## A.4.3.12 Load History Purge

This purge deletes the load data from history tables after it completes its typical lifecycle. This reduces the load on frequently accessed tables.

Any enterprise using the Console must schedule purge transactions.

You can use purge codes pseudo-logic to analyze purges. If the following condition is met, a load is picked up for purge:

- The last modification made to the load is before the lead time (in days) setup.

> **Note:** Before you run this transaction, ensure to purge loads and move them to history tables. For more information about purging loads, see Section A.4.3.13, "Load Purge".

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–162 Load History Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | LOADHISTPRG |
| Base Document Type | Load |
| Base Process Type | Load Execution |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–163 Load History Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |

*Table A–163 Load History Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| EnterpriseCode | Optional. Enterprise for which the Load Purge needs to be run. If not passed, all enterprises are monitored. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| Purge Code | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–164 Load History Purge Statistics*

| Statistic Name | Description |
|---|---|
| NumLoadHistoriesPurged | Number of load histories purged. |
| NumLoadShipmentHistoriesPurged | Number of load shipment histories purged. |

## Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_Load_H table.

## Events Raised

None.

### Tables Purged

YFS_LOAD_H

YFS_LOAD_STOP_H

YFS_LOAD_SHIPMENT_CHARGE_H

YFS_LOAD_STATUS_AUDIT_H

YFS_SHIPMENT_CONTAINER_H

YFS_CONTAINER_ACTIVITY_H

YFS_LOADED_CONTAINER_H

YFS_LOAD_SHIPMENT_H

YFS_ADDITIONAL_DATE_H

YFS_LOAD_HOLD_TYPE_H

YFS_LOAD_HOLD_TYPE_LOG_H

## A.4.3.13 Load Purge

This purge removes load data from the system. It picks up all loads that have been marked as ‘Closed’ and purges them. Empty Loads (for example, loads with no shipments) are not considered for purge. As a part of this purge, the associated child tables are also purged.

This is not a pipeline transaction. It also does not work from the task queue.

Any enterprise using the Console must schedule purge transactions.

You can use purge codes pseudo-logic to analyze purges. If the following condition is met, a load is picked up for purge:

- The Load’s last modification should fall before the lead time (in days) setup.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–165 Load Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | LOADPRG |
| Base Document Type | Load |
| Base Process Type | Load Execution |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–166 Load Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| EnterpriseCode | Optional. Enterprise for which the Load Purge needs to be run. If not passed, then all enterprises are monitored. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |

*Table A–166 Load Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–167 Load Purge Statistics*

| Statistic Name | Description |
|---|---|
| NumLoadShipmentsPurged | Number of load shipments purged. |
| NumLoadsPurged | Number of loads purged. |

## Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_Load table.

## Events Raised

None.

## Tables Purged

YFS_ADDITIONAL_DATE

YFS_LOAD

YFS_LOAD_HOLD_TYPE

YFS_LOAD_HOLD_TYPE_LOG

YFS_LOAD_STOP

YFS_LOAD_SHIPMENT

YFS_LOAD_SHIPMENT_CHARGES (charges that pertain to this load)

YFS_LOAD_STATUS_AUDIT

YFS_LOADED_CONTAINER

YFS_SHIPMENT_CONTAINER

YFS_CONTAINER_ACTIVITY

### A.4.3.14 Negotiation History Purge

This purge deletes negotiation history data from the system. This reduces the load on frequently accessed tables. It purges data from the order negotiation history tables.

You can use purge codes pseudo-logic to analyze purges. If the following condition is met, a negotiation is picked up for history purge:

- The last modified date of the negotiation exceeds the retention day period.

Any enterprise using the Console must schedule purge transactions.

#### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–168 Negotiation History Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | NEGOTIATIONHISTPRG |
| Base Document Type | Order |
| Base Process Type | Order Negotiation |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–169 Negotiation History Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| EnterpriseCode | Optional. Enterprise for which the Negotiation History Purge needs to be run. If not passed, then all enterprises are monitored. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–170 Negotiation History Purge Statistics***

| Statistic Name | Description |
|---|---|
| NumNegotiationHistoriesPurged | Number of negotiation histories purged. |

### Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_Negotiation_Hdr_H table.

### Events Raised

None.

### Tables Purged

YFS_AUDIT

YFS_NEGOTIATION_HDR_H

YFS_NEGOTIATION_LINE_H

YFS_RESPONSE_H

YFS_RESPONSE_HDR_H

YFS_RESPONSE_LINE_H

YFS_RESPONSE_LINE_DTL_H

## A.4.3.15 Negotiation Purge

This purge archives data into history tables after it completes its typical lifecycle. This reduces the load on frequently accessed tables. It works from the task queue (YFS_TASK_Q) table.

You can use purge codes pseudo-logic to analyze purges. If the following condition is met, a negotiation is picked up for purge:

- The last modification performed on the negotiation falls before the lead time (in days) setup.
- The negotiation is in pickable status.

Any enterprise using the Console must schedule purge transactions.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–171 Negotiation Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | ORD_NEGOTIATION_PURGE |
| Base Document Type | Order |
| Base Process Type | Order Negotiation |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–172 Negotiation Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| EnterpriseCode | Optional. Enterprise for which the Negotiation Purge needs to be run. If not passed, then all enterprises are monitored. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |

*Table A–172 Negotiation Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| Next Task Queue Interval | Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–173 Negotiation Purge Statistics*

| Statistic Name | Description |
|---|---|
| NumOrderNegotiationsPurged | Number of order negotiations purged. |

## Pending Job Count

For this transaction, the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table.

## Events Raised

None

## Tables Purged

YFS_AUDIT

YFS_NEGOTIATION_HDR

YFS_NEGOTIATION_LINE

YFS_RESPONSE

YFS_RESPONSE_HDR

YFS_RESPONSE_LINE

YFS_RESPONSE_LINE_DTL

### A.4.3.16 Opportunity History Purge

This transaction deletes tasks previously archived by the Opportunity Purge. See Section A.4.3.17, "Opportunity Purge".

You can use purge codes pseudo-logic to analyze purges. If the following conditions are met, an opportunity that is previously purged by the opportunity purge agent is picked up for history purge:

- The last modified date of the opportunity should exceed the retention day period.
- The quote history is purged.

#### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–174 Opportunity History Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | OPPORTUNITYHISTPRG |
| Base Document Type | Opportunity |
| Base Process Type | Opportunity Fulfillment |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–175 Opportunity History Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| Live | Optional. Mode in which to run. Defaults to N.<br>• Y - Default value. Removes qualifying records from the history tables listed under Tables Purged.<br>• N- Test mode. Determines the rows that are removed without actually removing them. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| EnterpriseCode | Optional. Enterprise for which the Opportunity History Purge needs to be run. If not passed, then all enterprises are monitored.<br>**Note**: When the EnterpriseCode is blank, the purge criteria configured for the DEFAULT enterprise is used; not the purge criteria configured for the opportunity's enterprise. |
| CollectPendingJobs | If this parameter is set to "N", the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the System Management Console. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–176 Opportunity History Purge Statistics***

| Statistic Name | Description |
|---|---|
| NumOpportunityHistoryPurged | Number of opportunity histories purged. |

### Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_OPPORTUNITY_H table.

### Events Raised

None.

### Tables Purged

YFS_OPPORTUNITY_H

## A.4.3.17 Opportunity Purge

This time-triggered transaction purges all the opportunities for a period greater than the retention days specified in the Opportunity Purge criteria, and those which are either in the status of cancelled or completed.

You can use purge codes pseudo-logic to analyze purges. If the following conditions are met, an opportunity is picked up for purge:

- The last modified date of the opportunity should exceed the retention day period.
- The quote associated with the opportunity should be purged.
- The opportunity should be in pickable status by the purge transaction.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–177 Opportunity Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | OPPORTUNITYPRG |
| Base Document Type | Opportunity |
| Base Process Type | Opportunity Fulfillment |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–178 Opportunity Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| Live | Optional. Mode in which to run. Defaults to Y.<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |

*Table A–178 Opportunity Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| EnterpriseCode | Optional. Enterprise for which the Opportunity Purge needs to be run. If not passed, then all enterprises are monitored.<br>**Note**: When the EnterpriseCode is blank, the purge criteria configured for the DEFAULT enterprise is used; not the purge criteria configured for the opportunity's enterprise. |
| CollectPendingJobs | If this parameter is set to "N", the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the System Management Console. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–179 Opportunity Purge Statistics*

| Statistic Name | Description |
|---|---|
| NumOpportunityPurged | Number of opportunities purged. |

## Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_OPPORTUNITY table.

## Events Raised

None.

## Tables Purged

YFS_OPPORTUNITY

### A.4.3.18 Order History Purge

This purge deletes data from history tables after it completes its typical lifecycle. This reduces the load on frequently accessed tables.

You can use purge codes pseudo-logic to analyze purges. If the following condition is met, an order is picked up for history purge:

- The last modified date of the order exceeds the retention day period.

Any enterprise using the Console must schedule purge transactions.

For more information about Additional Purge Criteria Based on Line Type, see the *Sterling Distributed Order Management: Configuration Guide*.

> **Note:** The order should have been purged and moved into the history tables before you can run this transaction. See Section A.4.3.19, "Order Purge".

#### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–180 Order History Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | ORDERHISTPRG |
| Base Document Type | Order |
| Base Process Type | Order Fulfillment |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–181 Order History Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| EnterpriseCode | Optional. Enterprise for which the Order History Purge needs to be run. If not passed, then all enterprises are monitored. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Removes qualifying records from the history tables listed under Tables Purged.<br>• N- Test mode. Determines the rows that are removed without actually removing them. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–182 Order History Purge Statistics***

| Statistic Name | Description |
|---|---|
| NumOrderHistoriesPurged | Number of order histories purged. |

## Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_Order_HEADER_H table.

## Events Raised

None.

## Tables Purged

YFS_ANSWER_SET_TRAN_H

YFS_ANSWER_TRAN_H

YFS_CHARGE_TRAN_DIST_H

YFS_CHARGE_TRAN_REQUEST_H

YFS_CHARGE_TRAN_RQ_MAP_H

YFS_CHARGE_TRANSACTION_H

YFS_CREDIT_CARD_TRANSACTION_H

YFS_ENTITY_ADDRESS_H

YFS_HEADER_CHARGES_H

YFS_INSTRUCTION_DETAIL_H

YFS_INVOICE_COLLECTION_H

YFS_LINE_CHARGES_H

YFS_NOTES_H

YFS_ORDER_AUDIT_DETAIL_H

YFS_ORDER_AUDIT_H

YFS_ORDER_AUDIT_LEVEL_H

YFS_ORDER_DATE_H

YFS_ORDER_HEADER_H

YFS_ORDER_HOLD_TYPE_H

YFS_ORDER_HOLD_TYPE_LOG_H

YFS_ORDER_INVOICE_DETAIL_H

YFS_ORDER_INVOICE_H

YFS_ORDER_KIT_LINE_H

YFS_ORDER_KIT_LINE_SCHEDULE_H

YFS_ORDER_LINE_H

YFS_ORDER_LINE_OPTION_H

YFS_ORDER_LINE_REQ_TAG_H

YFS_ORDER_LINE_SCHEDULE_H

YFS_ORDER_PROD_SER_ASSOC_H

YFS_ORDER_RELEASE_H

YFS_ORDER_RELEASE_STATUS_H

YFS_ORDER_SER_PROD_ITEM_H

YFS_PAYMENT_H

YFS_PROMOTION_AWARD_H

YFS_PROMOTION_H

YFS_RECEIVING_DISCREPANCY_DTL_H

YFS_RECEIVING_DISCREPANCY_H

YFS_REFERENCE_TABLE_H

YFS_TAX_BREAKUP_H

YIC_BOM_HEADER_H

YIC_BOM_LINE_H

YIC_BOM_MESSAGE_H

YIC_BOM_PROP_H

### A.4.3.19 Order Purge

This purge archives data into history tables after it completes its typical lifecycle. To purge orders from history tables, see Section A.4.3.18, "Order History Purge". This reduces the load on frequently accessed tables. It works on a task queue. It picks up the orders from YFS_TASK_Q table that are available for the transaction PURGE.

**Note:** This transaction depends on all lines of an order being in a status pickable by the Purge transaction.

**Note:** If purge criteria are not met, AVAILABLE_DATE is calculated based on the modify time stamp of the order in YFS_ORDER_HEADER table as well as the YFS_TASK_Q table, whichever is maximum. To this value, retention days is added to the new AVAILABLE_DATE.

The following statuses are available for configuration to be picked up by Order Purge:

- Draft Created (1000) and all extended Draft Created Statuses.
- Created (1100) and all extended Created statuses. These statuses are available only for document types Sales Order, Purchase Order and Transfer Order.
- Released (3200) and all extended Released statuses.
- Shipped (3700) and all extended Shipped statuses.
- Completed (3700) and all extended Completed statuses. These statuses are available only for the document type Master Order.
- Received (3900) and all extended Received statuses.
- Cancelled (9000) and all extended Cancelled statuses.
- Shorted (9020) and all extended Shorted statuses.

You can use purge codes pseudo-logic to analyze purges. If the following conditions are met, an order is picked up for purge:

- All open child orders (derived, chained, return, exchange, procurement, or refund fulfillment) for the order must already be purged.
- No pending transfer-out charges to another order exceeding the transfer-ins.
- No pending adjustment invoices.

An order is purged immediately if it meets the above three criteria and is completely cancelled with payment collection complete.

> **Note:** In order for the purge agent to pick up a cancelled order, the payment status of the order must be one of the following:
>
> - Paid
> - Not Applicable

If an order does not meet any of the above criteria, continue checking for the criteria given below:

- No order release status record that does not meet the retention days.
- It should be in the correct status for purge. For example,
  - All service requests for the order should have Shipped or extended Shipped status.
  - The payment status for the order should be Paid Cancelled or Not Applicable.
  - It must not have any unpurged negotiations.
- For all order lines other than service request lines:
  - If the Seller inventory update is required, the Status Inventory Type has the “Update Seller Supply” option turned on, and the Seller Supply Type is “Onhand”, or blank. (The Seller Supply Type can also be a custom seller supply type with the “Onhand Supply” checkbox enabled.)
  - If the Seller Demand Type is blank.
  - If the Buyer inventory update is required and the Buyer Supply Type is “Onhand”, or blank.
- The order's last modification should fall before the lead time (in days) setup.
- Any enterprise using the Console must schedule purge transactions.
- The order must not have a undelivered service line.

- In the case of an exchange order for processing a return order, the exchange order should be purged from history before the return order can be purged.

> **Note:** With no change to status inventory type, a sales order in Shipped (3700) status or its extended status is purged if the Buyer is not passed.
>
> An order in Shipped status or extended Shipped status in the default pipeline is not purged if the Buyer passed on the sales order is tracking inventory. This prevents the purging of the order relating to the pending supply for the Buyer tracking inventory.
>
> To purge such orders, the status inventory type for the Shipped or extended Shipped status should be configured such that the Buyer Supply Type is ONHAND for the status inventory type.
>
> When the purge agent is run, the draft order without lines are purged to the order history table. Once the purge history agent is run, the draft orders without lines gets deleted permanently.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–183 Order Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | PURGE |
| Base Document Type | Order |
| Base Process Type | Order Fulfillment |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–184 Order Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Next Task Queue Interval | Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours. |
| EnterpriseCode | Optional. Enterprise for which the Order Purge needs to be run. If not passed, then all enterprises are monitored.<br>**Note**: When the EnterpriseCode is blank, the purge criteria configured for the DEFAULT enterprise is used; not the purge criteria configured for the order's enterprise. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |

*Table A–184 Order Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| PurgeCode | Required. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. You can set this parameter to the following values:<br>• DRAFTORDERHISTPRG to purge draft order information from the order history tables.<br>• DRAFTORDERNOLINEHISTPRG to purge draft orders without order lines from the order history tables.<br>• DRAFTORDERNOLINEPRG to purge draft orders that have no order lines.<br>• DRAFTORDERPRG to purge draft order information and archive it in the order history tables.<br>PurgeCode cannot be set to the value ORDER_RELEASE_STATUS_PURGE. |
| AdditionalPurgeCode | Optional. To purge order release status records, set this parameter to ORDER_RELEASE_STATUS_PURGE.<br>For more information, see Section A.4.3.20, "Order Release Status Purge". |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–185 Order Purge Statistics*

| Statistic Name | Description |
|---|---|
| NumOrdersProcessed | Number of order processed. |
| NumOrdersPurged | Number of orders purged. |

### Pending Job Count

For this transaction, the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table.

### Events Raised

None.

### Tables Purged

YFS_ACTIVITY_DEMAND

YFS_ANSWER_SET_TRAN

YFS_ANSWER_TRAN

YFS_CHARGE_TRANSACTION

YFS_CHARGE_TRAN_DIST

YFS_CHARGE_TRAN_REQUEST

YFS_CHARGE_TRAN_RQ_MAP

YFS_CREDIT_CARD_TRANSACTION

YFS_ENTITY_ADDRESS

YFS_HEADER_CHARGES

YFS_INSTRUCTION_DETAIL

YFS_INVOICE_COLLECTION

YFS_LINE_CHARGES

YFS_MONITOR_ALERT

YFS_NOTES

YFS_ORDER_AUDIT

YFS_ORDER_AUDIT_DETAIL

YFS_ORDER_AUDIT_LEVEL

YFS_ORDER_HEADER

YFS_ORDER_HOLD_TYPE

YFS_ORDER_HOLD_TYPE_LOG

YFS_ORDER_INVOICE

YFS_ORDER_INVOICE_DETAIL

YFS_ORDER_KIT_LINE

YFS_ORDER_KIT_LINE_SCHEDULE

YFS_ORDER_LINE

YFS_ORDER_LINE_OPTION

YFS_ORDER_LINE_REQ_TAG

YFS_ORDER_LINE_RESERVATION

YFS_ORDER_LINE_SCHEDULE

YFS_ORDER_LINE_SRC_CNTRL

YFS_ORDER_PROD_SER_ASSOC

YFS_ORDER_RELEASE

YFS_ORDER_RELEASE_STATUS

YFS_ORDER_SER_PROD_ITEM

YFS_ORDER_DATE

YFS_PAYMENT

YFS_PMNT_TRANS_ERROR

YFS_PROMOTION

YFS_PROMOTION_AWARD

YFS_RECEIVING_DISCREPANCY

YFS_RECEIVING_DISCREPANCY_DTL

YFS_REFERENCE_TABLE

YFS_TAX_BREAKUP

YIC_BOM_HEADER

YIC_BOM_LINE

YIC_BOM_MESSAGE

YIC_BOM_PROP

### A.4.3.20 Order Release Status Purge

The Order Release Status Purge agent extends the Order Purge agent's capabilities by purging order release status records before the Order Purge agent completely purges data to history tables.

If an order meets the criteria for purging, the order release status records with quantities of 0 are deleted from the YFS_ORDER_RELEASE_STATUS table and are not put into the history table.

When the Order Release Status Purge agent has completed, the task queue's AVAILABLE_DATE is reset to the date specified by the purge criteria for Order Purge. This enables the Order Purge agent to pick up and process an order as necessary. Order Purge will continue to purge order release status records as usual.

If the following conditions are met, the Order Purge agent purges order release status records:

- All conditions for Order Purge have been met. See Section A.4.3.19, "Order Purge" for information about conditions for Order Purge.
- Order release records have 0 quantity.
- AdditionalPurgeCode in the Order Purge criteria is set to ORDER_RELEASE_STATUS_PURGE.
- The order has been modified within the Order Purge lead days AdditionalPurgeCode.

#### Criteria Parameters

The following are the criteria parameters for Order Release Status Purge:

***Table A–186 Order Release Status Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Next Task Queue Interval | Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours. |

*Table A–186 Order Release Status Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| EnterpriseCode | Optional. Enterprise for which the Order Purge needs to be run. If not passed, then all enterprises are monitored.<br>**Note**: When the EnterpriseCode is blank, the purge criteria configured for the DEFAULT enterprise is used; not the purge criteria configured for the order's enterprise. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| PurgeCode | Required. To extend the Order Purge agent to purge order release status records, set to ORDERPRG. Used for internal calculations, such as determining retention days. You must also set AddtionalPurgeCode. |
| AdditionalPurgeCode | Required. To purge order release status records, set this parameter to ORDER_RELEASE_STATUS_PURGE. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

None.

## Pending Job Count

The pending job count is the number of records available to be processed by Order Purge with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table.

### Events Raised

None.

### Tables Purged

YFS_ORDER_RELEASE_STATUS

## A.4.3.21 Order Status Audit Purge

This purge removes order status audit data from the system. This reduces the load on frequently accessed tables.

You can use purge codes pseudo-logic to analyze purges. If the following condition is met, an order status audit is picked up for history purge:

- The last modified time falls before the lead time (in days) setup.

Any enterprise using the Console must schedule purge transactions.

**Note:** This transaction needs to be run after negotiation is completed.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–187 Order Status Audit Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | STATUSAUDITPRG |
| Base Document Type | Order |
| Base Process Type | Order Fulfillment |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–188 Order Status Audit Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| EnterpriseCode | Optional. Enterprise for which the Order Status Audit Purge needs to be run. If not passed, then all enterprises are monitored. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where the YFS_STATUS_AUDIT Table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–189 Order Status Audit Purge Statistics***

| Statistic Name | Description |
|---|---|
| NumStatusAuditsPurged | Number of status audits purged. |

### Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_Status_Audit table.

### Events Raised

None.

### Tables Purged

YFS_STATUS_AUDIT

## A.4.3.22 Organization Audit Purge

This purge removes the YFS_AUDIT table data from the system, which reduces the load on frequently accessed tables. It purges records in the YFS_AUDIT and the YFS_AUDIT_HEADER tables that meet the following conditions:

- The YFS_AUDIT records that have ‘modifyts’ greater than the retention days specified and the records have the table name as 'YFS_ORGANIZATION'.
- The last modified time is before the lead time (in days) setup.

When the enterprise modifies records in the YFS_ORGANIZATION table through the Applications Manager, the YFS_ ORGANIZATION is audited and the audit records are inserted in the YFS_AUDIT table. In order to clean up the audit records, this purge transaction can be used.

Any enterprise using the Console must schedule purge transactions.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–190 Organization Audit Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | YFS_ORGANIZATION_AUDIT_PURGE |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–191 Organization Audit Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, the value defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), this value defaults to 5000. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Production mode. Deletes records from the regular tables.<br>• N - Test mode. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds to the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where the YFS_AUDIT and YFS_AUDIT_HEADER tables may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–192 Organization Audit Purge Statistics***

| Statistic Name | Description |
|---|---|
| NumOrganizationAuditRecordsPurged | Number of organization audit records purged. |

### Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_AUDIT table that match the criteria values.

### Events Raised

None.

### Tables Purged

YFS_AUDIT

YFS_AUDIT_HEADER

## A.4.3.23 Person Info Purge

This purge gets a list of dates with the person info record count and sorts them by date in ascending order. Then, based on the specified number of records to buffer and the modify timestamp, it purges the applicable records and places them in the YFS_PERSON_INFO_H table.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–193 PersonInfo Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | PERSONINFOPRG |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |

*Table A–193 PersonInfo Purge Attributes*

| Attribute | Value |
|---|---|
| APIs Called | None |
| User Exits Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

*Table A–194 PersonInfo Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time.<br>• If left blank or the number specified is less than 10000, it defaults to 10000.<br>• If the number specified is greater than 10000, then that value is used. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| CollectPendingJobs | If this parameter is set to "N", the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the System Management Console. |

***Table A–194 PersonInfo Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| EnterpriseCode | Optional. Enterprise for which the PersonInfo Purge needs to be run. If not passed, then all enterprises are monitored. |
| TableType | Required in a multi schema deployment when YFS_Person_Info table may exist in multiple schemas.<br>Valid Values: CONFIGURATION, TRANSACTION, MASTER.<br>If set to CONFIGURATION, purge runs for the YFS_Person_Info records associated with tables that have TableType as CONFIGURATION; for example, YFS_Organization, YFS_Ship_Node, and so forth.<br>If set to TRANSACTION, purge runs for the YFS_Person_Info records associated with tables that have TableType as TRANSACTION; for example, YFS_Order_Header, YFS_Shipment, and so forth.<br>Note that purge would run for all TableTypes that exist in the same schema as the one passed. For example, if set to TRANSACTION, purge would also run for YFS_Person_Info records associated with tables that have TableType as MASTER, since they reside in the same schema. |
| ColonyID | Required in a multi schema deployment where the YFS_PERSON_INFO table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

If it is left blank or any number less than 10,000 is specified, then it defaults to 10,000. But if any number > 10,000 is specified, then that value would be used.

*Table A–195 PersonInfo Purge Statistics*

| Statistic Name | Description |
|---|---|
| NumPersonInfoPurged | Number of person info records purged. |

### Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_PERSON_INFO table.

### Events Raised

None.

### Tables Purged

YFS_PERSON_INFO

## A.4.3.24 Person Info History Purge

This purge deletes records from the YFS_PERSON_INFO_H table based on the purge criteria.

### Attributes

The following are the attributes for this time-triggered transaction:

*Table A–196 PersonInfo History Purge Attributes*

| Attribute | Value |
|---|---|
| Base Transaction ID | PERSONINFOHISTPRG |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–197 PersonInfo History Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time.<br>• If left blank or the number specified is less than 10000, it defaults to 10000.<br>• If the number specified is greater than 10000, then that value is used. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| CollectPendingJobs | If this parameter is set to "N", the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the System Management Console. |
| EnterpriseCode | Optional. Enterprise for which the PersonInfo Purge needs to be run. If not passed, then all enterprises are monitored. |

*Table A–197 PersonInfo History Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| TableType | Required in a multi schema deployment when YFS_Person_Info table may exist in multiple schemas.<br>Valid Values: CONFIGURATION, TRANSACTION, MASTER.<br>If set to CONFIGURATION, purge runs for the YFS_Person_Info records associated with tables that have TableType as CONFIGURATION; for example, YFS_Organization, YFS_Ship_Node, and so forth.<br>If set to TRANSACTION, purge runs for the YFS_Person_Info records associated with tables that have TableType as TRANSACTION; for example, YFS_Order_Header, YFS_Shipment, and so forth.<br>Note that purge would run for all TableTypes that exist in the same schema as the one passed. For example, if set to TRANSACTION, purge would also run for YFS_Person_Info records associated with tables that have TableType as MASTER, since they reside in the same schema. |
| ColonyID | Required in a multi schema deployment where the YFS_PERSON_INFO_H table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–198 PersonInfo History Purge Statistics*

| Statistic Name | Description |
|---|---|
| NumPersonInfoHIstoryRecordsPurged | Number of person info history records purged. |

## Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_PERSON_INFO_H table.

### Events Raised

None.

### Tables Purged

YFS_PERSON_INFO_H

## A.4.3.25 Picklist Purge

This purge picks up all picklists that have been existing for a period greater than the retention days specified in the criteria parameters and those that do not have any shipments.

Any enterprise using the Console must schedule purge transactions.

You can use purge codes pseudo-logic to analyze purges. If the following conditions are met, a picklist is picked up for purge:

- The picklist should exist for more than the specified retention period.
- The picklist should not be associated with any shipment.

**Note:** All shipments associated with the picklists should have been purged before running this purge agent.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–199 Picklist Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | PICKLISTPRG |
| Base Document Type | Order |
| Base Process Type | Order Delivery |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–200 Picklist Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where the YFS_PICK_LIST table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–201 Picklist Purge Statistics***

| Statistic Name | Description |
|---|---|
| NumPickListsPurged | Number of picklists purged. |

### Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_PICK_LIST table.

### Events Raised

None.

### Tables Purged

YFS_PICK_LIST

## A.4.3.26 Price List Purge

This purge removes price list data from the system. This reduces the load on frequently accessed tables.

Any enterprise using the Console must schedule purge transactions.

You can use purge codes pseudo-logic to analyze purges. If the following condition is met, a price list is picked up for purge:

- The price list has valid date less than the current date minus the purge criteria's retention days.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–202 Price List Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | PRICELISTPRG |
| Base Document Type | General |
| Base Process Type | General |

*Table A–202 Price List Purge Attributes*

| Attribute | Value |
|---|---|
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

*Table A–203 Price List Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–204 Price List Purge Statistics***

| Statistic Name | Description |
|---|---|
| NumPriceSetsPurged | Number of price sets purged. |

### Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_Price_Set table.

### Events Raised

None.

### Tables Purged

YFS_PRICE_SET table with VALID_TILL_DATE less than or equal to (CurrentDate - LeadDays)

YFS_PRICE_PROGRAM_DEFN

YFS_ITEM_PRICE_SET

YFS_ITEM_PRICE_SET_DTL

## A.4.3.27 Purge Catalog Mass Audits

This purge removes old audit records from the YFS_CATALOG_MASS_AUDIT table. This table contains data about changes to the catalog due to assignment of attributes and attribute values to categories and items. It also contains information about inherited attributes and attribute values. The purge transaction finds mass audit records that have not been modified in a specified number of days and removes those records from the database.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–205 Purge Catalog Mass Audits Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | CATALOG_MASS_AUDIT_PURGE |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–206 Purge Catalog Mass Audits Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |

*Table A–206 Purge Catalog Mass Audits Criteria Parameters*

| Parameter | Description |
|---|---|
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where the YFS_CATALOG_MASS_AUDIT table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–207 Purge Catalog Mass Audits Statistics*

| Statistic Name | Description |
|---|---|
| NumCatalogMassAuditsPurged | Number of mass audit records purged. |

### Pending Job Count

For this transaction the pending job count is the total number of records that can be purged from the YFS_CATALOG_MASS_AUDIT table.

### Events Raised

None.

### Tables Purged

The YFS_CATALOG_MASS_AUDIT table is purged when MODIFYTS < (CurrentDate - LeadDays)

## A.4.3.28 Receipt History Purge

This transaction deletes receipts previously archived by the Receipt Purge. See Section A.4.3.29, "Receipt Purge".

Any enterprise using the Console must schedule purge transactions.

You can use purge codes pseudo-logic to analyze purges. If the following conditions are met, a receipt that is previously purged by the receipt purge agent is picked up for history purge:

- The last modified date of the receipt should exceed the retention day period.
- The shipment associated with the receipt should be purged from the history table.

**Note:** To purge a receipt history, ensure that the Receipts are closed and Shipments are purged.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–208 Receipt History Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | RECEIPTHISTPRG |
| Base Document Type | Order |
| Base Process Type | Order Fulfillment |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–209 Receipt History Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |

*Table A–209 Receipt History Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| EnterpriseCode | Optional. Enterprise for which the Receipt History Purge needs to be run. If not passed, then all enterprises are monitored. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Removes qualifying records from the history tables listed under Tables Purged.<br>• N- Test mode. Determines the rows that are removed without actually removing them. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–210 Receipt History Purge Statistics*

| Statistic Name | Description |
|---|---|
| NumReceiptLineHistoriesPurged | Number of receipt line histories purged. |
| NumReceiptHistoriesPurged | Number of receipt histories purged. |

## Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_Receipt_Header_H table.

## Events Raised

None.

### Tables Purged

YFS_RECEIPT_HEADER_H

YFS_RECEIPT_LINE_H

YFS_RECEIPT_STATUS_AUDIT_H

YFS_INSTRUCTION_DETAIL_H

## A.4.3.29 Receipt Purge

This purge removes receipt data from the system. This reduces the load on frequently accessed tables. This transaction picks up all receipts that are not open and not pending inspection and archives them into their history tables. See Section A.4.3.28, "Receipt History Purge". It also archives and purges the receipt's child tables.

This is a pipeline transaction and works from a task queue.

Any enterprise using the Console must schedule purge transactions.

You can use purge codes pseudo-logic to analyze purges. If the following conditions are met, a receipt is picked up for purge:

- The last modified date of the receipt should exceed the retention day period.
- The shipment associated with the receipt should be purged.
- The receipt should be in pickable status for the purge transaction.
- The value of the OpenReceiptFlag field should be set to "N".
- The receipt should not have pending inspections.
- There is no inventory in the warehouse for the receipt.

> **Note:** To purge a receipt, ensure that the receipts are closed and Shipments are purged.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–211 Receipt Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | RECEIPTPRG |
| Base Document Type | Order |
| Base Process Type | Order Fulfillment |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | `YFSBeforePurgeUE` |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–212 Receipt Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| EnterpriseCode | Optional. Enterprise for which the Receipt Purge needs to be run. If not passed, then all enterprises are monitored. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |

*Table A–212 Receipt Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–213 Receipt Purge Statistics*

| Statistic Name | Description |
|---|---|
| NumReceiptLinesPurged | Number of Receipt Lines purged. |
| NumReceiptsPurged | Number of receipts purged. |

## Pending Job Count

For this transaction, the pending job count is the number of records available to be processed by the transaction with the AVAILABLE_DATE value less than or equal to (<=) the current date value in the YFS_Task_Q table.

## Events Raised

None.

## Tables Purged

YFS_RECEIPT_HEADER

YFS_RECEIPT_LINE

YFS_RECEIPT_STATUS_AUDIT

YFS_INSTRUCTION_DETAIL

### A.4.3.30 Reprocess Error Purge

This purge deletes reprocess errors from the system. This reduces the load on frequently accessed tables.

You can use purge codes pseudo-logic to analyze purges. If the following conditions are met, a YFS_REPROCESS_ERROR table is picked up for purge:

- YFS_REPROCESS_ERROR records with State = Fixed or Ignored is processed.
- The last modified time is earlier than the lead time (in days) setup.

> **Note:** This purge only reads the rules defined by the hub. Enterprise overridden rules are not considered.

Any enterprise using the ConsoleConsole must schedule purge transactions.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–214 Reprocess Error Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | REPROCESSPRG |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–215 Reprocess Error Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |

*Table A–215 Reprocess Error Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where the YFS_REPROCESS_ERROR table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–216 Reprocess Error Purge Statistics*

| Statistic Name | Description |
|---|---|
| NumReprocessErrorsPurged | Number of reprocess errors purged. |

### Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_REPROCESS_ERROR table.

### Events Raised

None.

### Tables Purged

YFS_REPROCESS_ERROR

## A.4.3.31 Reservation Purge

This purge deletes expired inventory reservations from the system. This reduces the load on frequently accessed tables as well as free up demands that are consumed by expired reservations.

You can use purge codes pseudo-logic to analyze purges. If the following condition is met, all records in the YFS_INVENTORY_RESERVATION tables are picked up for purge:

- EXPIRATION_DATE is earlier than the current date or quantity is less than or equal to 0

Any enterprise using the Console must schedule purge transactions.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–217 Reservation Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | RESERVATIONPRG |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–218 Reservation Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |

*Table A–218 Reservation Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where the YFS_INVENTORY_RESERVATION table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–219 Reservation Purge Statistics*

| Statistic Name | Description |
|---|---|
| NumReservationsPurged | Number of reservations purged. |

## Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_INVENTORY_RESERVATION table.

## Events Raised

None.

## Tables Purged

YFS_INVENTORY_RESERVATION

### A.4.3.32 Shipment History Purge

This transaction deletes shipments previously archived by the Shipment Purge. See Section A.4.3.33, "Shipment Purge".

Any enterprise using the Console must schedule purge transactions.

You can use purge codes pseudo-logic to analyze purges. If the following condition is met, all records archived in the history table are picked up for purge:

- The last modification performed on the shipment falls before the lead time (in days) setup.

> **Note:** Orders related to the shipments should have been purged by order purge. Shipments should have been closed by the Close Shipment transaction. See Section A.3.10, "Close Shipment".

#### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–220 Shipment History Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | SHIPMENTHISTPRG |
| Base Document Type | Order |
| Base Process Type | Order Delivery |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–221 Shipment History Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| EnterpriseCode | Optional. Enterprise for which the Shipment History Purge needs to be run. If not passed, then all enterprises are monitored. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Removes qualifying records from the history tables listed under Tables Purged.<br>• N- Test mode. Determines the rows that are removed without actually removing them. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–222 Shipment History Purge Statistics***

| Statistic Name | Description |
|---|---|
| NumShipmentHistoriesPurged | Number of shipment histories purged. |
| NumShipmentLineHistoriesPurged | Number of shipment line histories purged. |

### Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_Shipment_H table.

### Events Raised

None.

### Tables Purged

YFS_ADDITIONAL_ATTRIBUTE_H

YFS_ADDITIONAL_DATE_H

YFS_AUDIT

YFS_CONTAINER_DETAILS_H

YFS_CONTAINER_STS_AUDIT_H

YFS_INSTRUCTION_DETAIL_H

YFS_SHIPMENT_CONTAINER_H

YFS_SHIPMENT_H

YFS_SHIPMENT_LINE_H

YFS_SHIPMENT_LINE_REQ_TAG_H

YFS_SHIPMENT_STATUS_AUDIT_H

YFS_SHIPMENT_TAG_SERIAL_H

YFS_CONTAINER_ACTIVITY_H

## A.4.3.33 Shipment Purge

This purge removes shipment data from the system. This reduces the load on frequently accessed tables. This transaction picks up all shipments that have been marked as ‘Closed’ and archives them into their history tables. See Section A.4.3.32, "Shipment History Purge". It also archives and purges the shipment's child tables.

This is not a pipeline transaction. It also does not work from the task queue.

Any enterprise using the Console must schedule purge transactions.

**Note:** Orders related to the shipments should have been purged by order purge. Shipments should have been closed by the Close Shipment transaction. See Section A.3.10, "Close Shipment".

You can use purge codes pseudo-logic to analyze purges. If the following conditions are met, a shipment is picked up for purge:

- The last modification performed on the shipment should fall before the lead time (in days) setup.
- The value of the ShipmentClosedFlag field should be set to "Y".
- The order record should already be purged for all shipment lines.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–223 Shipment Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | SHIPMENTPRG |
| Base Document Type | Order |
| Base Process Type | Order Delivery |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–224 Shipment Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Number of Days To Execute | Optional. Maximum number of days before the lead days the agent will look for shipment records to purge. |
| EnterpriseCode | Optional. Enterprise for which the Shipment Purge needs to be run. If not passed, then all enterprises are monitored. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–225 Shipment Purge Statistics***

| Statistic Name | Description |
|---|---|
| NumShipmentsPurged | Number of Shipments purged. |
| NumShipmentLinesPurged | Number of Shipment Lines purged. |

## Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_Shipment table.

## Events Raised

None.

## Tables Purged

YFS_ADDITIONAL_ATTRIBUTES

YFS_ADDITIONAL_DATE

YFS_AUDIT

YFS_CONTAINER_DETAILS

YFS_LOAD_SHIPMENT_CHARGE

YFS_MONITOR_ALERT

YFS_SHIPMENT_CONTAINER

YFS_SHIPMENT_STATUS_AUDIT

YFS_SHIPMENT

YFS_INSTRUCTION_DETAIL

YFS_SHIPMENT_MONITOR_ALERT

YFS_HEADER_CHARGES

YFS_LINE_CHARGES

YFS_TAX_BREAKUP

YFS_SHIPMENT_HOLD_TYPE

YFS_SHIPMENT_HOLD_TYPE_LOG

YFS_SHIPMENT_TAG_SERIALS

YFS_SHIPMENT_LINE

YFS_SHIPMENT_LINE_REQ_TAG

YFS_ACTIVITY_DEMAND

YFS_CONTAINER_STS_AUDIT

YFS_CONTAINER_ACTIVITY

### A.4.3.34 Shipment Statistics Purge

This transaction deletes the shipment statistics from the table older than the specified retention days.

This agent should be used whenever shipment statistics records need to be removed, such as after application server restart.

You can use purge codes pseudo-logic to analyze purges. If the following condition is met, the shipment statistics are picked up for purge:

- The last modification performed on the shipment statistics should fall before the lead time (in days) setup.

#### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–226 Shipment Statistics Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | PRG_SHIP_STATS |
| Base Document Type | Order |
| Base Process Type | Order Delivery |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–227 Shipment Statistics Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| EnterpriseCode | Optional. Enterprise for which the Shipment Statistics Purge needs to be run. If not passed, then all enterprises are monitored. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where the YFS_SHIPMENT_STATISTICS table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Parameters

The following are the statistics parameters for this transaction:

***Table A–228 Shipment Statistics Purge Statistics***

| Parameter | Description |
|---|---|
| NumShipmentStatisticsPurged | Number of shipment statistics purged. |

### Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_SHIPMENT_STATISTICS table.

### Events Raised

None.

### Tables Purged

YFS_SHIPMENT_STATISTICS

## A.4.3.35 User Activity Purge

This purge deletes the user activity data from the system. It purges all records older than the specified retention days, and those records which have a logged out status. This purge must be single threaded when you run it in batch delete mode (BatchDelete=Y).

The following limitation is assumed when purging records:

This purge do not purge any record if the Application server goes down abruptly because the audit records of users connected to the application server at the time when the server went down cannot be updated. As a result, the last activity time or the logout time is not populated. The purge does not know whether the user has logged out or still logged in. Therefore, you need to manually delete these records.

The following are the attributes for this time-triggered transaction:

***Table A–229 User Activity Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | USERACTIVITYPRG |
| Base Document Type | None |
| Base Process Type | None |
| APIs Called | None |
| User Exits Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–230 User Activity Purge Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under  to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| CollectPendingJobs | If this parameter is set to "N", the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the System Management Console. |
| Number of Records To Buffer | Required. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 100. |

*Table A–230 User Activity Purge Parameters*

| Parameter | Description |
|---|---|
| BatchDelete | Required. The method by which all records are deleted from the table. Valid values are:<br>• Y - Default value. Records are deleted in batches.<br>• N - Records are deleted one by one. |
| ColonyID | Required in a multi schema deployment where the YFS_USER_ACTIVITY table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–231 Statistics Purge Statistics*

| Statistic Name | Description |
|---|---|
| NumStatisticsPurged | Number of statistics purged |

### Pending Job Count

None.

### Events Raised

None.

### Tables Purged

YFS_USER_ACTIVITY

## A.4.3.36 User Activity Audit Purge

This purge removes user activity audit data from the system. It purges all records older than the specified retention days. It purges only those records which have a logged out status (records with a Login_Type of ‘T’ or ‘N’). This purge should be single threaded when you run it in batch delete mode(BatchDelete=Y).

The following limitation is assumed when purging records:

- This purge does not purge any records if the Application server goes down abruptly because the audit records of users connected to application servers at the time the server went down cannot be updated. As a result, the last activity time or the logout time does not get populated and the purge does not know whether the user was logged out or was still logged in. These records have to be deleted manually.

The following are the attributes for this time-triggered transaction:

***Table A–232 User Activity Audit Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | USERACTAUDPURGE |
| Base Document Type | None |
| Base Process Type | None |
| APIs Called | None |
| User Exits Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–233 User Activity Audit Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |

*Table A–233 User Activity Audit Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| CollectPendingJobs | If this parameter is set to "N", the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the System Management Console. |
| Number of Records To Buffer | Required. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 100. |
| BatchDelete | Required. The method by which all records are deleted from the table. Valid values are:<br>• Y - Default value. Records are deleted in batches.<br>• N - Records are deleted one by one. |
| ColonyID | Required in a multi schema deployment where the YFS_USER_ACT_AUDIT table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–234 Statistics Purge Statistics*

| Statistic Name | Description |
|---|---|
| NumStatisticsPurged | Number of statistics purged |

## Pending Job Count

None.

### Events Raised

None.

### Tables Purged

YFS_USR_ACT_AUDIT

## A.4.3.37 Work Order History Purge

This transaction deletes tasks previously archived by the Work Order Purge. See Section A.4.3.38, "Work Order Purge".

You can use purge codes pseudo-logic to analyze purges. If the following condition is met, a work order that is previously purged by the work order purge agent is picked up for history purge:

- The last modified date of the work order should exceed the retention day period.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–235 Work Order History Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | WORK_ORDER_HISTORY_PURGE |
| Base Document Type | Work Order |
| Base Process Type | VAS |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | `YFSBeforePurgeUE` |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–236 Work Order History Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| Live | Optional. Mode in which to run. Defaults to N.<br>• Y - Default value. Removes qualifying records from the history tables listed under Tables Purged.<br>• N- Test mode. Determines the rows that are removed without actually removing them. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Node | Optional. Node for which the Work Order History Purge needs to be run. If not passed, then all nodes are monitored. |
| AgentCriteriaGroup | Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that only perform their tasks on the nodes with a matching node transactional velocity value.<br>Valid values are: LOW, HIGH, and any additional values defined by the Hub from Application Platform > System Administration > Agent Criteria Groups. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–237 Work Order History Purge Statistics***

| Statistic Name | Description |
|---|---|
| NumWorkOrderHistoriesPurged | Number of work order histories purged. |

## Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_WORK_ORDER_H table.

## Events Raised

None.

## Tables Purged

YFS_AUDIT

YFS_WO_APPT_USER_H

YFS_WORK_ORDER_H

YFS_WORK_ORDER_APPT_H

YFS_WORK_ORDER_ACTIVITY_H

YFS_WORK_ORDER_ACTY_DTL_H

YFS_WORK_ORDER_AUDT_DTL_H

YFS_WORK_ORDER_COMPONENT_H

YFS_WORK_ORDER_COMP_TAG_H

YFS_WORK_ORDER_HOLD_TYPE_H

YFS_WORK_ORDER_HOLD_TYPE_LOG_H

YFS_WORK_ORDER_PROD_DEL_H

YFS_WORK_ORDER_SERVICE_LINE_H

YFS_WORK_ORDER_STS_AUDIT_H

YFS_WORK_ORDER_TAG_H

### A.4.3.38 Work Order Purge

This time-triggered transaction purges all the work orders for a period greater than the retention days specified in the Work Order Purge criteria and those, which are either in the status of cancelled or completed.

You can use purge codes pseudo-logic to analyze purges. If the following conditions are met, a work order is picked up for purge:

- The last modified date of the work order should exceed the retention day period.
- The order associated with the work order should be purged.
- The work order should be in pickable status by the purge transaction.

#### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–238 Work Order Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | WORK_ORDER_PURGE |
| Base Document Type | Work Order |
| Base Process Type | VAS |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | `YFSBeforePurgeUE` |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–239 Work Order Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| Live | Optional. Mode in which to run. Defaults to Y.<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Node | Optional. Node for which the Work Order Purge needs to be run. If not passed, then all nodes are monitored. |
| AgentCriteriaGroup | Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that only perform their tasks on the nodes with a matching node transactional velocity value.<br>Valid values are: LOW, HIGH, and any additional values defined by the Hub from Application Platform > System Administration > Agent Criteria Groups. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–240 Work Order Purge Statistics***

| Statistic Name | Description |
|---|---|
| NumWorkOrdersPurged | Number of work orders purged. |

## Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_WORK_ORDER table.

## Events Raised

None.

## Tables Purged

YFS_AUDIT

YFS_WO_APPT_USER

YFS_WORK_ORDER

YFS_WORK_ORDER_ACTIVITY

YFS_WORK_ORDER_ACTY_DTL

YFS_WORK_ORDER_HOLD_TYPE

YFS_WORK_ORDER_HOLD_TYPE_LOG

YFS_WORK_ORDER_APPT

YFS_WORK_ORDER_AUDT_DTL

YFS_WORK_ORDER_COMPONENT

YFS_WORK_ORDER_COMP_TAG

YFS_WORK_ORDER_PROD_DEL

YFS_WORK_ORDER_SERVICE_LINE

YFS_WORK_ORDER_STS_AUDIT

YFS_WORK_ORDER_TAG

### A.4.3.39 YFS Audit Purge

This purge removes the YFS_AUDIT table data from the system, which reduces the load on frequently accessed tables. It purges records in the YFS_AUDIT and the YFS_AUDIT_HEADER tables that meet the following conditions:

- YFS_AUDIT records that have 'modifyts' greater than the retention days specified and the value of table name matches in the YFS_ AUDIT table.
- The last modified time is before the lead time (in days) setup.

> **Note:** The way you configure the YFS Audit Purge may have some effect on the functioning of the Configuration Data Versioning Tool. For more information about configuration of the Data Versioning Tool, see the *Selling and Fulfillment Foundation: Configuration Deployment Tool Guide*.

When the enterprise extends the entities and sets the extended entities attribute AuditTable="Y", the extended tables are audited and the audit records are inserted in the YFS_AUDIT table. In order to clean up the audit records, this purge transaction can be used.

Any enterprise using the Console must schedule purge transactions.

#### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–241 YFS Audit Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | YFS_AUDIT_PURGE |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | YFSBeforePurgeUE |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–242 YFS Audit Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, this value defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), this value defaults to 5000. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Production mode. Deletes records from the regular tables.<br>• N - Test mode. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| Table Name | Required. The table name for which the audit records need to be purged. |

*Table A–242 YFS Audit Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| TableType | Required in a multischema deployment when YFS_AUDIT table may exist in multiple schemas.<br>Valid Values: CONFIGURATION, TRANSACTION, MASTER.<br>If set to CONFIGURATION, the agent runs for the YFS_AUDIT records associated with tables that have TableType as CONFIGURATION; for example, YFS_Organization, YFS_Ship_Node, and so forth.<br>If set to TRANSACTION, the agent runs for the YFS_AUDIT records associated with tables that have TableType as TRANSACTION; for example, YFS_Order_Header, YFS_Shipment, and so forth.<br>Note that the agent would run for all TableTypes that exist in the same schema as the one passed. For example, if set to TRANSACTION, the agent would also run for YFS_AUDIT records associated with tables that have TableType as MASTER, since they reside in the same schema. |
| ColonyID | Required in a multi schema deployment where the YFS_AUDIT and YFS_AUDIT_HEADER tables may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–243 YFS Audit Purge Statistics*

| Statistic Name | Description |
|---|---|
| NumAuditRecordsPurged | Number of audit records purged. |

## Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the YFS_AUDIT table that match the criteria values.

### Events Raised

None.

### Tables Purged

YFS_AUDIT, YFS_AUDIT_HEADER

## A.4.3.40 YFSInventoryOwnershipAudit Purge

This transaction purges all the records from YFS_INV_OWN_TRANSFER_RCD prior to the lead days specified in criteria parameters.

### Attributes

Following are the attributes for this time-triggered transaction:

***Table A–244 YFSInventoryOwnership Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | PURGE_INV_TRANSFR_RECORD |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | None |

### Criteria Parameters

Following are the criteria parameters for this transaction:

***Table A–245 YFSInventoryOwnership Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, this value defaults to Get, which is the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), this value defaults to 5000. |

*Table A–245 YFSInventoryOwnership Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| EnterpriseCode | Optional. The inventory organization for which the YFSInventoryOwnership Audit Purge needs to run. If not passed, all the enterprises are monitored. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Production mode. Deletes records from the regular tables.<br>• N - Test mode. |
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds to the PurgeCode used in the Business Rules Purge Criteria. |
| Lead Days | Number of days before the present date, the agent will purge the records. |
| ColonyID | Required in a multi schema deployment where the YFS_INV_OWN_TRANSFER_RCD table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

None.

### Pending Job Count

None.

### Tables Purged

YFS_INV_OWN_TRANSFER_RCD

## A.4.3.41 Password Reset Request Purge

This purge deletes password reset request data from the system.

You can use purge codes pseudo-logic to analyze purges.

Any enterprise using the Console must schedule purge transactions.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–246 Password Reset Request Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | None |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–247 Password Reset Request Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |

*Table A–247 Password Reset Request Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where the PLT_PWD_REQ table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–248 Password Reset Request Purge Statistics*

| Statistic Name | Description |
|---|---|
| NumPasswordRequestPurged | Number of password requests purged. |

### Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the PLT_PWD_REQ table.

### Events Raised

None.

### Tables Purged

PLT_PWD_REQ

## A.4.3.42 User Login Failure Purge

This purge deletes data on number of failed login attempts of users from the system.

You can use purge codes pseudo-logic to analyze purges.

Any enterprise using the Console must schedule purge transactions.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–249 User Login Failure Purge Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | None |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |
| User Exits Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–250 User Login Failure Purge Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| Live | Optional. Mode in which to run. Valid values are:<br>• Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables.<br>• N - Test mode. Determines the rows that are moved to history tables without actually moving them. |

*Table A–250 User Login Failure Purge Criteria Parameters*

| Parameter | Description |
|---|---|
| PurgeCode | Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria. |
| ColonyID | Required in a multi schema deployment where the PLT_USER_LOGIN_FAILED table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

*Table A–251 User Login Failure Purge Statistics*

| Statistic Name | Description |
|---|---|
| NumUserLoginFailPurged | Number of failed login attempts purged. |

### Pending Job Count

For this transaction, the pending job count is the number of records that can be purged from the PLT_USER_LOGIN_FAILED table.

### Events Raised

None.

### Tables Purged

PLT_USER_LOGIN_FAILED

## A.5 Task Queue Syncher Time-Triggered Transactions

Many transactions use the task queue as their work repository. The workflow manager automatically creates tasks for transactions to handle the next processing step, as configured in your pipeline.

In some situations, the task queue repository may become out of date. For example, when reconfiguring the processing pipeline while the pipeline is active, the queue may go out of synch with the new pipeline configuration.

Alerts that indicate a halt in the lifecycle of a business document may indicate an out-dated task queue repository.

The task queue syncher transactions are designed to update the task queue repository with the latest list of open tasks to be performed by each transaction, based on the latest pipeline configuration.

The available task queue synchers are:

- Load Execution Task Queue Syncher
- Order Delivery Task Queue Syncher
- Order Fulfillment Task Queue Syncher
- Order Negotiation Task Queue Syncher
- Quote Fulfillment Task Queue Syncher

**Note:** Some of the statistics collected and tracked in Release 9.0 for time-triggered transactions, monitors, and integration and application servers may change with the next release.

## A.5.1 Load Execution Task Queue Syncher

This transaction synchronizes the task queue for the load execution process type.

You can use the following pseudo-logic to analyze this time-triggered transaction. If the following conditions are met, a task queue for the load execution process type is synchronized:

- LOAD_CLOSED_FLAG of Load should not be 'Y'.
- Load should be in a status that is pickable by a transaction in the pipeline.
- There should not be any Task Q record for the load, transaction combination in the Task Q table. In this case, the system inserts one Task Q record for this load, transaction combination with the current database time as the available date.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–252 Load Execution Task Queue Syncher Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | TASK_QUEUE_SYNCHER_L_D |
| Base Document Type | Load |
| Base Process Type | Load Execution |
| Abstract Transaction | No |
| APIs Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–253 Load Execution Task Queue Syncher Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–254 Load Execution Task Queue Syncher Statistics***

| Statistic Name | Description |
|---|---|
| NumTasksCreated | Number of tasks created. |

## Pending Job Count

None.

### Events Raised

None.

## A.5.2 Order Delivery Task Queue Syncher

This transaction synchronizes the order delivery process type.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–255 Order Delivery Task Queue Syncher Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | TASK_QUEUE_SYNCHER_O_D |
| Base Document Type | Order |
| Base Process Type | Order Delivery |
| Abstract Transaction | No |
| APIs Called | None |

### Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–256 Order Delivery Task Queue Syncher Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–257 Order Delivery Task Queue Syncher Statistics***

| Statistic Name | Description |
|---|---|
| NumTasksCreated | Number of tasks created. |

### Pending Job Count

None.

### Events Raised

None.

## A.5.3 Order Fulfillment Task Queue Syncher

This transaction synchronizes the order fulfillment process type.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–258 Order Fulfillment Task Queue Syncher Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | TASK_QUEUE_SYNCHER_O_F |
| Base Document Type | Order |
| Base Process Type | Order Fulfillment |
| Abstract Transaction | No |
| APIs Called | None |

## Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–259 Order Fulfillment Task Queue Syncher Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–260 Order Fulfillment Task Queue Syncher Statistics***

| Statistic Name | Description |
|---|---|
| NumTasksCreated | Number of tasks created. |

## Pending Job Count

None.

## Events Raised

None.

## A.5.4 Order Negotiation Task Queue Syncher

This transaction synchronizes the order negotiation process type.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–261 Order Negotiation Task Queue Syncher Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | TASK_QUEUE_SYNCHER_O_N |
| Base Document Type | Order |
| Base Process Type | Order Negotiation |
| Abstract Transaction | No |
| APIs Called | None |

### Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–262 Order Negotiation Task Queue Syncher Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–263 Order Negotiation Task Queue Syncher Statistics***

| Statistic Name | Description |
|---|---|
| NumTasksCreated | Number of tasks created. |

### Pending Job Count

None.

### Events Raised

None.

## A.5.5 Quote Fulfillment Task Queue Syncher

This transaction synchronizes the quote fulfillment process type.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–264 Quote Fulfillment Task Queue Syncher Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | TASK_QUEUE_SYNCHER_Q_F |
| Base Document Type | Order |
| Base Process Type | Quote Fulfillment |
| Abstract Transaction | No |
| APIs Called | None |

### Criteria Parameters

The following are the criteria parameters for this transaction:

***Table A–265 Quote Fulfillment Task Queue Syncher Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–266 Quote Fulfillment Task Queue Syncher Statistics***

| Statistic Name | Description |
|---|---|
| NumTasksCreated | Number of tasks created. |

### Pending Job Count

None.

### Events Raised

None.

## A.6 Monitors

Monitors are transactions that watch for processes or circumstances that are out of bounds and then raise alerts.

> **Note:** Some of the statistics collected and tracked in Release 9.0 for time-triggered transactions, monitors, and integration and application servers may change with the next release of Selling and Fulfillment Foundation.

**Note:** All Monitors have a CollectPendingJobs criteria parameter. If this parameter is set to N, the agent does not collect information on the pending jobs for that monitor. This pending job information is used for monitoring the monitor in the System Management Console. By default, CollectPendingJobs is set to Y. It can be helpful to set it to N if one monitor is performing a significant amount of getPendingJobs queries and the overhead cost is too high.

## A.6.1 Availability Monitor

This time-triggered transaction monitors inventory availability. The Availability Monitor raises global alerts when the available inventory falls below the configured quantities on the current day, on subsequent days within the ATP time frame, and on subsequent days outside of the ATP time frame. The quantities for the days outside of the ATP time frame are determined by the maximum monitoring days. Unlike the schedule and release transactions, the Availability Monitor calculates the actual availability beyond the ATP horizon and does not assume infinite inventory.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–267 Availability Monitor Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | ATP_MONITOR |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |

## Criteria Parameters

The following are the criteria parameters for this monitor:

***Table A–268 Availability Monitor Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| MonitorOption | Optional. Specifies how to monitor inventory. Valid values are:<br>• 1 - current inventory<br>• 0 - inventory within and outside of the ATP time frame. This is the default value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| InventoryOrganizationCode | Optional. Valid owner inventory organization. Organization to process in this run. If not passed, all inventory organizations are processed. |
| CollectPendingJobs | If this parameter is set to N, the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the System Management Console. |
| Status | The negotiation status you are monitoring. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

None.

### Pending Job Count

None.

### Events Raised

No events are raised. Individual actions associated with the monitoring rule are run.

Data published to the actions is `AVAILABILITY_MONITOR_dbd.txt`.

## A.6.2 Exception Monitor

This time-triggered transaction monitors exceptions in your system as noted below. It monitors the exceptions logged in the system and escalates these exceptions:

- If an exception has not been assigned to a user by a certain time
- If an exception has not been resolved by a certain time
- If the active size of the queue is more than a certain maximum size

In order to prevent re-alerts on exceptions during every run of the Exception Monitor, specify a re-alert interval through Alert Management in the Applications Manager. This attribute is associated with a queue and can be configured for each queue.

### Attributes

The following are the attributes for this time-triggered transaction:

***Table A–269 Exception Monitor Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | EXCEPTION_MONITOR |
| Base Document Type | General |
| Base Process Type | General |
| Abstract Transaction | No |
| APIs Called | None |

## Criteria Parameters

The following are the criteria parameters for this monitor:

***Table A–270 Exception Monitor Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| QueueID | Optional. Defines the Alert Queue into which exceptions from this monitor are stored. |
| OrganizationCode | Optional. Organization to process in this run. If not passed, all inventory organizations are processed. |
| CollectPendingJobs | If this parameter is set to N, the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the System Management Console. |
| QueueGroup | Optional. Defines the set of Queues for which the exceptions will be monitored. If both QueueId and QueueGroup are supplied, QueueId is ignored. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–271 Exception Monitor Statistics***

| Statistic Name | Description |
|---|---|
| NumInboxProcessed | Number of alerts processed. |
| NumExceededQueueSizeAlerts | Number of actions raised when the number of unresolved alerts exceeds the queue's maximum active size. |

*Table A–271 Exception Monitor Statistics*

| Statistic Name | Description |
|---|---|
| NumUnResolvedAlerts | Number of actions raised when the unresolved alert time of an alert exceeds the queue's resolution time. |
| NumUnAssignedAlerts | Number of actions raised when the unassigned alert time of an alert exceeds the queue's assignment time. |

### Pending Job Count

None.

### Events Raised

No events are raised. Individual actions associated with the monitoring rule are run.

## A.6.3 Inventory Monitor

This time-triggered transaction monitors inventory availability at ship node level. It raises alerts at the ship node level when the available inventory exceeds or drops below the configured quantities.

This monitor uses the OPEN_ORDER demand type to calculate available inventory at a given node. All supplies assigned to a supply type that is considered by the OPEN_ORDER demand type are considered. For more information about configuring inventory supply and demand considerations, refer to the *Sterling Global Inventory Visibility: Configuration Guide*.

### Attributes

The following are the attributes for this time-triggered transaction:

*Table A–272 Inventory Monitor Attributes*

| Attribute | Value |
|---|---|
| Base Transaction ID | INVENTORY_MONITOR |
| Base Document Type | General |
| Base Process Type | General |

*Table A–272 Inventory Monitor Attributes*

| Attribute | Value |
|---|---|
| Abstract Transaction | No |
| APIs Called | `checkAvailability()` |

## Criteria Parameters

The following are the criteria parameters for this monitor:

*Table A–273 Inventory Monitor Criteria Parameters*

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| InventoryOrganizationCode | Optional. Valid inventory owner organization. Organization to process in this run. If not passed, all inventory organizations are processed. |
| CollectPendingJobs | If this parameter is set to N, the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the System Management Console. |
| AllowedOverriddenCriteria | If this parameter is set to Y, the overriding value for the agent criteria parameters can be provided in the command line in the following format when triggering the agent:<br>`<AgentCriteriaAttribute>`<br>`<OverriddenValue>`<br>For more information about passing these attributes, see the *Selling and Fulfillment Foundation: Installation Guide* |

*Table A–273 Inventory Monitor Criteria Parameters*

| Parameter | Description |
|---|---|
| ShipNodes | Optional. Comma-separated list of valid ship nodes that should be processed in this run. If not passed, all the ship nodes are processed. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

None.

### Pending Job Count

None.

### Events Raised

No events are raised. Individual actions associated with the monitoring rule are run.

Data published to the actions is `<INSTALL_DIR>/xapidocs/api_javadocs/dbd/INVENTORY_MONITOR_dbd.txt`.

## A.6.4 Negotiation Monitor

This time-triggered transaction alerts the Enterprise when a negotiation remains in a particular status for a specific amount of time. This also monitors the negotiation expiration date. This time-triggered transaction invokes the actions configured against the negotiation statuses. Configure status Expired (2000) to monitor negotiation expiration date.

Use this monitor in environments where Order or order release has to go through a negotiation phase and you want to monitor the negotiation.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–274 Negotiation Monitor Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | ORD_NEGOTIATION_MONITOR |
| Base Document Type | Order |
| Base Process Type | Order Negotiation |
| Abstract Transaction | No |
| APIs Called | None |

## Criteria Parameters

The following are the criteria parameters for this monitor:

***Table A–275 Negotiation Monitor Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| EnterpriseCode | Optional. Enterprise for which the Negotiation Monitor needs to be run. If not passed, then all enterprises are monitored. |
| CollectPendingJobs | If this parameter is set to N, the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the System Management Console. |
| Status | The negotiation status you are monitoring. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

### Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–276 Negotiation Monitor Statistics***

| Statistic Name | Description |
|---|---|
| NumNegotiationsProcessed | Number of negotiations processed. |
| NumNegotiationsRequiringAlert | Number of negotiations which have at least one alert raised. |

### Pending Job Count

None.

### Events Raised

This invokes the actions configured against the negotiation statuses.

Key Data - Not Applicable.

Data Published - `YCP_getNegotiationDetails_output.xml`

## A.6.5 Enhanced Order Monitor

The enhanced order monitor enables you to monitor the following situations:

- Milestone x has not been reached y hours before a given date type.
- Milestone x has not been reached within y hours of a given date type.
- Milestone x has not been reached within y hours of milestone z.
- Milestone x has been reached y hours before a given date type.
- Milestone x has been reached within y hours of a given date type.
- Milestone x has been reached within y hours after milestone z.
- The order has been in status x for y hours.
- Date type x is y hours before date type z.
- Date type x is y hours after date type z.
- The order has been in hold type x for y hours.
- The order has been in hold type x for y hours before date type z.

The order monitor can be configured to monitor the following system date types for Sales Order and Purchase Order document types:

- Actual Order Date - Read from the ORDER_DATE column of the YFS_ORDER_HEADER table.
- Actual Next Iteration Date - Read from the NEXT_ITER_DATE column of the YFS_ORDER_HEADER table.
- Requested Ship Date - If there is an order release, read from the REQ_SHIP_DATE column of the YFS_ORDER_RELEASE table. Otherwise, read from the REQ_SHIP_DATE of the YFS_ORDER_LINE table.
- Expected Ship Date - Read from the EXPECTED_SHIPMENT_DATE column of the YFS_ORDER_LINE_SCHEDULE table. If it is null, uses the same logic as Requested Ship Date.
- Actual Ship Date - If the date is before 01/01/2500, read from he EXPECTED_SHIPMENT_DATE column of the YFS_ORDER_LINE_SCHEDULE table. If the date is on or after 01/01/2500, this date type is returned as null.
- Requested Delivery Date - If there is a release, read from the REQ_DELIVERY_DATE column of the YFS_ORDER_RELEASE table.
- Expected Delivery Date - Read from the EXPECTED_DELIVERY_DATE column of the YFS_ORDER_LINE_SCHEDULE table. If it is null, uses the same logic as Requested Delivery Date.
- Actual Delivery Date - If the date is before 01/01/2500, read from he EXPECTED_DELIVERY_DATE column of the YFS_ORDER_LINE_SCHEDULE table. If the date is on or after 01/01/2500, this date type is returned as null.

**Note:** For Order Fulfillment, Planned Order Execution, Reverse Logistics, and Purchase Order Execution pipelines, the system defined dates such as Shipment and Delivery are stored without a time component. Therefore when you configure a rule using these dates, all time computations are carried out assuming they are always 12:00:00 AM.

For more information about milestones, date types, and monitoring rules, refer to the *Sterling Supply Collaboration: Configuration Guide*, the

appropriate section in this guide, and the *Sterling Reverse Logistics: Configuration Guide*.

**Important:** If you run the Enhanced Order Monitor, you must configure and run the Close Order time-triggered transaction in all applicable pipelines. For more information about the Close Order time-triggered transaction, see Section A.3.8, "Close Order".

**Note:** The same relog interval is used for all document types.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–277 Enhanced Order Monitor Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | ORDER_MONITOR_EX |
| Base Document Type | Order |
| Base Process Type | Order Fulfillment |
| Abstract Transaction | No |
| APIs Called | None |

## Criteria Parameters

The following are the criteria parameters for this monitor:

***Table A–278 Enhanced Order Monitor Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |

*Table A–278 Enhanced Order Monitor Criteria Parameters*

| Parameter | Description |
|---|---|
| EnterpriseCode | Optional. Enterprise for which the Order Monitor needs to be run. If not passed, then all enterprises are monitored. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this monitor:

*Table A–279 Enhanced Order Monitor Statistics*

| Statistic Name | Description |
|---|---|
| NumOrdersProcessed | Number of orders processed. |
| NumAlertsRaised | Number of alerts raised. |

## Pending Job Count

For this transaction the pending job count is the number of open orders with the value of NEXT_ALERT_TS less than or equal to (<=) the current date.

## Events Raised

*Table A–280 Events Raised by the Enhanced Order Monitor Transaction*

| Transaction/Event | Key Data | Data Published* | Template Support? |
|---|---|---|---|
| ON_AUTO_CANCEL | ORDER_MONITOR_dbd.txt | YFS_ORDER_MONITOR_EX.ON_AUTO_CANCEL.html | Yes |
| * These files are located in the following directory: <INSTALL_DIR>/xapidocs/api_javadocs/XSD/HTML | | | |

**Note:** The Enhance Order Monitor transaction raises the ON_AUTO_CANCEL event, but does not cancel the order. A service on this event should be configured to cancel the order.

### Monitor Rule's Condition Template

If a monitor rule contains a condition, the `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/ORDER_MONITOR_EX_CONDITION.xml` template file is used to obtain both the order details and the evaluating monitor rule details. See the provided `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/ORDER_MONITOR_EX_CONDITION.xml.sample` file for more details.

If the `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/ORDER_MONITOR_EX_CONDITION.xml` template file does not exist, the MonitorConsolidation->Order element of the default monitor template, the `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/ORDER_MONITOR_EX.xml` file, is used.

**Note:** Note: If the default monitor template is used, the MonitorConsolidation-> Order->OrderStatuses-> OrderStatus->MonitorRule element is ignored and is not passed into the condition.

## A.6.6 Enhanced Quote Monitor

The enhanced quote monitor enables you to monitor the following situations:

- Milestone x has not been reached y hours before a given date type.
- Milestone x has not been reached within y hours of a given date type.
- Milestone x has not been reached within y hours of milestone z.
- Milestone x has been reached y hours before a given date type.
- Milestone x has been reached within y hours of a given date type.

- Milestone x has been reached within y hours after milestone z.
- The order has been in status x for y hours.
- Date type x is y hours before date type z.
- Date type x is y hours after date type z.

The quote monitor can be configured to monitor the following system date types:

- Actual Expiration Date - Read frm the EXPIRATION_DATE column of the YFS_ORDER_HEADER table.

For more information about milestones, date types, and monitoring rules, refer to the appropriate section in this guide.

**Important:** If you run the Enhanced Quote Monitor, you must configure and run the Close Order time-triggered transaction in all applicable pipelines. For more information about the Close Order time-triggered transaction, see Section A.3.8, "Close Order".

**Note:** The same relog interval is used for all document types.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–281 Enhanced Quote Monitor Attributes***

| Attribute | Value |
|---|---|
| Transaction ID | ORDER_MONITOR_EX.0015 |
| Document Type | Quote |
| Process Type | Quote Fulfillment |
| Abstract Transaction | No |
| APIs Called | None |

## Criteria Parameters

The following are the criteria parameters for this monitor:

***Table A–282 Enhanced Quote Monitor Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| EnterpriseCode | Optional. Enterprise for which the Quote Monitor needs to be run. If not passed, then all enterprises are monitored. |
| CollectPendingJobs | If this parameter is set to N, the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the System Management Console. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this monitor:

***Table A–283 Enhanced Quote Monitor Statistics***

| Statistic Name | Description |
|---|---|
| NumOrdersProcessed | Number of quotes processed. |
| NumAlertsRaised | Number of alerts raised. |

## Pending Job Count

For this transaction the pending job count is the number of open orders with the value of NEXT_ALERT_TS less than or equal to (<=) the current date.

### Events Raised

No events are raised. Individual actions associated with the monitoring rule are run.

The data published is ORDER_MONITOR_EX.0015.xml.

### Monitor Rule's Condition Template

If a monitor rule contains a condition, the `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/ORDER_MONITOR_EX_CONDITION.xml` template file is used to obtain both the order details and the evaluating monitor rule details. See the provided `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/ORDER_MONITOR_EX_CONDITION.xml.sample` file for more details.

If the `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/ORDER_MONITOR_EX_CONDITION.xml` template file does not exist, the MonitorConsolidation->Order element of the default monitor template, the `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/ORDER_MONITOR_EX.xml` file, is used.

**Note:** Note: If the default monitor template is used, the MonitorConsolidation-> Order->OrderStatuses-> OrderStatus->MonitorRule element is ignored and is not passed into the condition.

## A.6.7 Enhanced Return Monitor

The enhanced return monitor allows you to monitor the following situations:

- Milestone x has not been reached y hours before a given date type.
- Milestone x has not been reached within y hours of a given date type.
- Milestone x has not been reached within y hours of milestone z.
- Milestone x has been reached y hours before a given date type.
- Milestone x has been reached within y hours of a given date type.
- Milestone x has been reached within y hours after milestone z.

- The order has been in status x for y hours.
- Date type x is y hours before date type z.
- Date type x is y hours after date type z.

The enhanced return monitor can be configured to monitor the following system date types:

- Actual Order Date - Read from the ORDER_DATE column of the YFS_ORDER_HEADER table
- Requested Ship Date - If there is an order release, read from the REQ_SHIP_DATE column of the YFS_ORDER_RELEASE table. Otherwise, read from the REQ_SHIP_DATE of the YFS_ORDER_LINE table.
- Expected Ship Date - Read from the EXPECTED_SHIPMENT_DATE column of the YFS_ORDER_LINE_SCHEDULE table. If it is null, uses the same logic as Requested Ship Date.
- Actual Ship Date - If the date is before 01/01/2500, read from he EXPECTED_SHIPMENT_DATE column of the YFS_ORDER_LINE_SCHEDULE table. If the date is on or after 01/01/2500, this date type is returned as null.
- Requested Delivery Date - If there is a release, read from the REQ_DELIVERY_DATE column of the YFS_ORDER_RELEASE table. Otherwise, read from the REQ_DELIVERY_DATE of the YFS_ORDER_LINE table.
- Expected Delivery Date - Read from the EXPECTED_DELIVERY_DATE column of the YFS_ORDER_LINE_SCHEDULE table. If it is null, uses the same logic as Requested Delivery Date.
- Actual Delivery Date - If the date is before 01/01/2500, read from he EXPECTED_DELIVERY_DATE column of the YFS_ORDER_LINE_SCHEDULE table. If the date is on or after 01/01/2500, this date type is returned as null.

**Note:** For Order Fulfillment, Planned Order Execution, Reverse Logistics, and Purchase Order Execution pipelines, the system defined dates such as Shipment and Delivery are stored without a time component. Therefore when you configure a rule using these dates, all time computations are carried out assuming they are always 12:00:00 AM.

For more information about milestones, date types, and monitoring rules, refer to the *Sterling Supply Collaboration: Configuration Guide*, the appropriate section in this guide, and the *Sterling Reverse Logistics: Configuration Guide*.

**Important:** If you run the Enhanced Return Monitor, you must configure and run the Close Order time-triggered transaction in all applicable pipelines. For more information about the Close Order time-triggered transaction, see Section A.3.8, "Close Order".

**Note:** The same relog interval is used for all document types.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–284 Enhanced Order Monitor Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | RETURN_MONITOR_EX |
| Base Document Type | Return Order |
| Base Process Type | Reverse Logistics |
| Abstract Transaction | No |
| APIs Called | None |

## Criteria Parameters

The following are the criteria parameters for this monitor:

***Table A–285 Enhanced Order Monitor Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| EnterpriseCode | Optional. Enterprise for which the Order Monitor needs to be run. If not passed, then all enterprises are monitored. |
| FromStatus | Optional. Statuses to monitor that are greater than or equal to the passed status. |
| ToStatus | Optional. Statuses to monitor that are less than or equal to the passed status. |
| CollectPendingJobs | If this parameter is set to N, the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the System Management Console. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this monitor:

***Table A–286 Enhanced Order Monitor Statistics***

| Statistic Name | Description |
|---|---|
| NumOrdersProcessed | Number of orders processed. |
| NumAlertsRaised | Number of alerts raised. |

### Pending Job Count

For this transaction the pending job count is the number of open orders with the value of NEXT_ALERT_TS less than or equal to (<=) the current date.

### Events Raised

No events are raised. Individual actions associated with the monitoring rule are run.

The data published is RETURN_MONITOR_EX.xml.

### Monitor Rule's Condition Template

If a monitor rule contains a condition, the `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/ORDER_MONITOR_EX_CONDITION.xml` template file is used to obtain both the order details and the evaluating monitor rule details. See the provided `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/ORDER_MONITOR_EX_CONDITION.xml.sample` file for more details.

If the `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/ORDER_MONITOR_EX_CONDITION.xml` template file does not exist, the MonitorConsolidation->Order element of the default monitor template, the `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/ORDER_MONITOR_EX.xml` file, is used.

> **Note:** If the default monitor template is used, the MonitorConsolidation-> Order->OrderStatuses-> OrderStatus->MonitorRule element is ignored and is not passed into the condition.

## A.6.8 Real-time Availability Monitor

The Real-time Availability Monitor time-triggered transaction monitors the inventory availability of inventory items. It can be configured to raise the `REALTIME_AVAILABILITY_CHANGE` event when the inventory level for a given item changes between the thresholds defined in the Applications Manager in the Global Inventory Visibility module.

It can be run in three modes:

- Activity Based: Raises the event in real time every time an item goes above or below one of the thresholds.
- Quick Sync: Re-sends the most recently published inventory availability information.
- Full Sync: Monitors all of the items regardless of activity and publishes the inventory information for all of the items.

In all cases, the percentage of future inventory availability is used for considering inventory availability at retrieval time. For more information about future inventory availability, see the *Sterling Global Inventory Visibility: Configuration Guide*.

Inventory available at the current date is considered as on-hand. The processing time in the ATP rules must be set to at least 1 day, or else past due supply is included as part of on-hand inventory. For more information about configuring ATP Rules, see the *Sterling Global Inventory Visibility: Configuration Guide*.

Demand of type OPEN_ORDER is used in getting the inventory availability picture.

If sourcing is maintained, the Real-time Availability Monitor can either monitor the total availability across nodes or the availability at individual nodes.

When monitoring the total availability across nodes, the Real-time Availability Monitor monitors all nodes in the default distribution group of the inventory organization.

When monitoring the availability at individual nodes, the Real-time Availability Monitor monitors all nodes in a specified distribution group. For more information about configuring distribution groups and node-level inventory monitoring, see the *Sterling Global Inventory Visibility: Configuration Guide*.

Inventory items without an Availability Monitor rule, or with a rule that is disabled, is unable to be processed by this time-triggered transaction.

If configured, the Real-time Availability Monitor also considers the onhand and future inventory availability safety factor during monitoring. For more information about the inventory availability safety factors and the `findInventory()` API, see the *Sterling Global Inventory Visibility: Configuration Guide* and the *Selling and Fulfillment Foundation: Javadocs*.

When the onhand quantity is greater than the configured low threshold, the `REALTIME_ONHAND` alert type is raised, and the alert level is based on the onhand quantity.

When the onhand quantity falls below the configured low threshold, the `REALTIME_FUTURE_MAX` alert type is raised, and the alert level is based on the total future supply (`FutureAvailableQuantity`) with `FirstFutureAvailableDate` set to the date on which the first future supply is available, and `FutureAvailableDate` set to the date on which the maximum future supply is available.

**Note:** When the Real-time Availability Monitor is run in activity based mode, changing one of the thresholds of an inventory item does not cause the agent to monitor it unless there is a change in activity. For example, if item I with available quantity 700 is being monitored with a low threshold of 600, and the low threshold is then changed to 1000, no event is published unless there is change in I's activity. In order to ensure that in such a scenario I is not left unmonitored, call the `createInventoryActivity` API when changing a monitoring rule for an item.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–287 Real-time Availability Monitor Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | REALTIME_ATP_MONITOR |
| Base Document Type | General |
| Base Process Type | General |

*Table A–287 Real-time Availability Monitor Attributes*

| Attribute | Value |
|---|---|
| Abstract Transaction | No |
| APIs Called | `FindInventory` |

## Criteria Parameters

The following are the criteria parameters for this monitor:

*Table A–288 Real-time Availability Monitor Criteria Parameters*

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to `Get`, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as `0` (zero), it defaults to `5000`. |
| InventoryOrganizationCode | Inventory organization code to use when `MonitorOption` is passed as `3`. The inventory organization has to be an enterprise.<br>If this is not passed, the monitor runs for all inventory organizations. |
| MonitorOption | `1` - Activity Based (Monitor based on distinct inventory items in `YFS_INVENTORY_ACTIVITY` table).<br>`2` – Quick Sync (Re-raise event to publish information from the `YFS_INVENTORY_ALERT` table).<br>`3` – Full Sync (Monitor based on all inventory items maintained by the inventory organization provided. If no InventoryOrganizationCode is provided, all inventory item is monitored).<br>If not provided, default value is `1`. |

***Table A–288 Real-time Availability Monitor Criteria Parameters***

| Parameter | Description |
|---|---|
| ItemStatuses | List of valid statuses of items to be processed. Statuses must be separated by a `,` for example `3000,2000`. This is only used when `MonitorOption` is passed as 2 or 3. If provided, only items with the matching statuses is monitored. |
| FromAlertTimestamp | This is only used when `MonitorOption` is passed as 2. If provided, the agent raises the REALTIME_AVAILABILITY_CHANGE event to re-publish inventory availability information which was published between the time that the agent started and FromAlertTimestamp.<br>If not provided, all inventory availability information published before the time that the agent started is re-published. |
| AllowedOverriddenCriteria | If set to Y, the overridden value for the agent criteria parameters can be provided at the command line while triggering the agent in the following format:<br>`<AgentCriteriaAttribute> <OverriddenValue>`<br>For more information about passing these attributes, see the *Selling and Fulfillment Foundation: Installation Guide*. |
| FromLastNumberOfHours | This is only used when MonitorOption is passed as 2 to calculate the FromAlertTimestamp parameter, if necessary.<br>If the FromAlertTimestamp parameter is not provided, it is calculated as current timestamp minus FromLastNumberOfHours. |

*Table A–288 Real-time Availability Monitor Criteria Parameters*

| Parameter | Description |
|---|---|
| CollectPendingJobs | If this parameter is set to N, the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the System Management Console. |
| RaiseEventsOnAllAvailability Changes | When set to Y, REALTIME_AVAILABILITY_CHANGE event is raised on all availability changes regardless of whether availability exceeds or falls below specified thresholds. This is only used when MonitorOption is passed as 1. Valid values: Y or N. Default value: N. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

None.

## Pending Job Count

None.

### Events Raised

The following events are raised by this time-triggered transaction:

***Table A–289 Events Raised by the Realtime Availability Monitor Transaction***

| Transaction / Event | Key Data | Data Published* | Template Support? |
|---|---|---|---|
| REALTIME_ AVAILABILITY_ CHANGE | None | YFS_REALTIME_ATP_ MONITOR.REALTIME_ AVAILABILITY_ CHANGE.html | Yes |
| * These files are located in the following directory: <INSTALL_DIR>/xapidocs/api_javadocs/XSD/HTML | | | |

**Note:** Although described as 'real-time', availability changes may not be triggered immediately as inventory changes occur if the agent has a backlog of messages to process. Furthermore, this monitor exists as a time-triggered transaction, and thus monitors availability of inventory items only when the monitor is triggered based on the configured runtime properties.

## A.6.9 Shipment Monitor

This time-triggered transaction reports the states of a shipment, based on rules in the YFS_MONITOR_RULE table. This transaction enables you to monitor the following situations:

- If the Shipment has been in a status for more than a specified amount of time.
- If a specified date that is associated with the shipment is:
  - n hours before another specified date
  - n hours after another specified date
  - n hours not before another specified date
  - n hours not after another specified date

- If the Shipment has been in a hold type for a specified amount of time.
- If the Shipment has been in a hold type for n hours before a specified date.

Monitoring rules can be configured for shipment's origin and destination points.

Monitoring rules cannot be configured for a shipment's intermediate pickup and drop off points. A shipment has intermediate pickup or drop off only if it has multiple pickup or drop off points. For example, a shipment has more than one loads carrying it. The shipment status on first load deposit, second load deposit, and so forth cannot be monitored. Once the last load deposits the shipment at its destination, then the shipment status can be marked and monitored.

This is not a pipeline transaction. It also does not work from the task queue.

For more information about milestones, date types, and monitoring rules, see the *Sterling Supply Collaboration: Configuration Guide*, the appropriate section in this guide, and the *Sterling Reverse Logistics: Configuration Guide*.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–290 Shipment Monitor Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | SHIPMENT_MONITOR |
| Base Document Type | Order |
| Base Process Type | Order Delivery |
| Abstract Transaction | No |
| APIs Called | None |

## Criteria Parameters

The following are the criteria parameters for this monitor:

***Table A–291 Shipment Monitor Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| EnterpriseCode | Optional. Enterprise for which the Shipment Monitor needs to be run. If not passed, then all enterprises are monitored. |
| CollectPendingJobs | If this parameter is set to N, the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the System Management Console. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–292 Shipment Monitor Statistics***

| Statistic Name | Description |
|---|---|
| NumShipmentsMonitored | Number of shipments monitored. |

## Pending Job Count

For this transaction the pending job count is the number of open shipments with the value of NEXT_ALERT_TS less than or equal to (<=) the current date.

### Events Raised

This invokes the actions configured against shipment statuses.

Key Data - Not Applicable.

Data Published - `SHIPMENT_MONITOR.xml`

### Monitor Rule's Condition Template

If a monitor rule contains a condition, the `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/SHIPMENT_MONITOR_CONDITION.xml` template file is used to obtain the shipment details and the evaluating monitor rule details. See the provided `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/SHIPMENT_MONITOR_CONDITION.xml.sample` file for more details.

If the `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/SHIPMENT_MONITOR_CONDITION.xml` template file does not exist, the MonitorConsolidation->Shipment element of the default monitor template, the `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/SHIPMENT_MONITOR.xml` file, is used.

> **Note:** If the default monitor template is used, the MonitorConsolidation->Shipment->MonitorRule element is ignored and is not passed into the condition.

## A.6.10 Work Order Monitor

This time-triggered transaction alerts the enterprise when a work order remains in a particular state or hold type for a specific amount of time.

Use this monitor to track how long work orders stay in a particular state or hold type.

## Attributes

The following are the attributes for this time-triggered transaction:

***Table A–293 Work Order Monitor Attributes***

| Attribute | Value |
|---|---|
| Base Transaction ID | WORK_ORDER_MONITOR |
| Base Document Type | Work Order |
| Base Process Type | VAS Process |
| Abstract Transaction | No |

## Criteria Parameters

The following are the criteria parameters for this monitor:

***Table A–294 Work Order Monitor Criteria Parameters***

| Parameter | Description |
|---|---|
| Action | Required. Triggers the transaction. If left blank it defaults to Get, the only valid value. |
| Number of Records To Buffer | Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000. |
| EnterpriseCode | Optional. Enterprise for which the Work Order Monitor needs to be run. If not passed, then all enterprises are monitored. |
| Node | Optional. Node for which the Work Order Monitor needs to be run. If not passed, then all nodes are monitored. |
| CollectPendingJobs | If this parameter is set to N, the agent does not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in the System Management Console. |
| ColonyID | Required in a multi schema deployment where a table may exist in multiple schemas. Runs the agent for the colony. |

## Statistics Tracked

The following statistics are tracked for this transaction:

***Table A–295 Work Order Monitor Statistics***

| Statistic Name | Description |
|---|---|
| NumWorkOrdersMonitored | Number of work orders monitored. |

## Pending Job Count

For this transaction the pending job count is the number of Work Orders that are monitored, where NEXT_ALERT_TS less than or equal to (<=) current date.

## Events Raised

No events are raised. Individual actions associated with the monitoring rule are run. Data published to the actions is workOrder_dbd.txt.

## Monitor Rule's Condition Template

If a monitor rule contains a condition, the `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/monitor/WORK_ORDER_MONITOR_CONDITION.xml` template file is used to obtain the work order details and the evaluating monitor rule details. See the provided `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/WORK_ORDER_MONITOR_CONDITION.xml.sample` file for more details.

If the `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/WORK_ORDER_MONITOR_CONDITION.xml` template file does not exist, the MonitorConsolidation->WorkOrder element of the default monitor template, the `<INSTALL_DIR>/repository/xapi/template/source/smcfs/monitor/WORK_ORDER_MONITOR.xml` file, is used.

**Note:** If the default monitor template is used, the MonitorConsolidation->WorkOrder->->MonitorRule element is ignored and is not passed into the condition.

# B

# Order Modification Types

The following are the default order modification types and their associated modification levels:

***Table B–1 Order Document Modification Types***

| Modification Types | Description | Modification Levels |
|---|---|---|
| Ad | An instruction can be added to an order document's header, line, or shipment.<br>For example, you may want to add an instruction stating that a line item needs to be gift wrapped. | Header<br>Line<br>Shipment<br>Receipt |
| Add Line | A line can be added to an order document's header, release, negotiation, or shipment.<br>**Important:** When adding a line to an order, the Add Line modification type does not get audited, if the prices are not configured. | Header<br>Release<br>Negotiation<br>Shipment |
| Add Note | A note can be added to an order document's header or release. | Header<br>Release |
| Add Option | An option can be added to a provided service or delivery service order line. | Line |

*Table B–1 Order Document Modification Types*

| Modification Types | Description | Modification Levels |
|---|---|---|
| Add Quantity | Additional quantity can be added to an order document's line or release line. | Line<br>Release Line |
| Add/Remove Additional Date | A date type used for shipment monitoring (such as, Ship Date) can either be added to or removed from an order document's shipment.<br>For example, you may want to add an additional delivery date used by your organization to monitor shipments. | Shipment |
| Add/Remove Charge | A charge can either be added to or removed from an order document's shipment.<br>For example, if a shipment contains hazardous materials and your organization has an extra shipping charge for shipment of hazardous materials, you can add an extra charge to the shipment. | Shipment |
| Add/Remove Container | A container can either be added to or removed from an order document's shipment. | Shipment |
| Associate Delivery Line With Product Line | When the delivery method of a product order line is delivery, the product line can be associated to a delivery line to indicate how the product line is delivered. | Line |

***Table B–1 Order Document Modification Types***

| Modification Types | Description | Modification Levels |
|---|---|---|
| Associate Product Line With Delivery Line | When the delivery method of a product order line is delivery, the product line can be associated to a delivery line to indicate how the product line is delivered. | Line |
| Associate Product Line With Service Line | A provided service can be associated to a product line to indicate that the service is somehow dependent on the product line. | Line |
| Associate Service Line With Product Line | A provided service can be associated to a product line to indicate that the service is somehow dependent on the product line. | Line |
| Attribute Modification | A receipts attributes can be modified. For a list of attributes that can be modified, see the changeReceipt API in the *Selling and Fulfillment Foundation: Javadocs*. | Receipt |
| Backorder | An order document's line, release, or release line can be backordered.<br>For example, if an order is released to a node and the node does not have enough quantity to fulfill the order, they can backorder the release. | Line<br>Release<br>Release Line |
| Cancel | An order document's header, line, release, or release line can be manually cancelled from the Application Consoles. | Header<br>Line<br>Release<br>Release Line |

*Table B–1 Order Document Modification Types*

| Modification Types | Description | Modification Levels |
|---|---|---|
| Change Additional Address | A modification can be made to the fields of any additional addresses that may have been configured for an order document's header or line. | Header<br>Line |
| Change Appointment | Appointments can be taken and changed for delivery and provided service order lines. | Line |
| Change Bill To | A modification can be made to any bill to address field associated with an order document's header or release. | Header<br>Release |

*Table B–1 Order Document Modification Types*

| Modification Types | Description | Modification Levels |
|---|---|---|
| Change Bundle Definition | The existing bundle definition can be replaced with the new bundle definition.<br><br>For example, you can change an existing bundle definition by passing the 'REPLACE_BUNDLE' action to the bundle parent. All the components passed remain with order and as well as with bundle. All remaining components are deleted.<br><br>Important: In addition to this, the modification type DELETE is executed on all the components getting removed and modification type ADD_LINE is executed on components getting added. This modification is applied to bundle parent's immediate components. | Line |
| Change Buyer Organization | The buyer organization associated with an order document’s header can be changed. This modification can only be made in the Order Detail screen. | Header |

***Table B–1 Order Document Modification Types***

| Modification Types | Description | Modification Levels |
|---|---|---|
| Change Carrier | A modification can be made to the Carrier/Service or Carrier field associated with an order document's header, line, or release.<br>For example, you can change the carrier and service from UPS Next Day Air to FedEx Express Saver Pack.<br>**Important:** If you want this modification type to be allowed, Change Carrier Service Code must also be allowed. | Header<br>Line<br>Release |
| Change Carrier Account No | A modification can be made to the Carrier Account # field associated with an order document's header, line, or release. | Header<br>Line<br>Release |
| Change Carrier Service Code | A modification can be made to the Carrier/Service field associated with an order document's header, line, or release.<br>For example, you can change the carrier and service from UPS Next Day Air to FedEx Express Saver Pack.<br>**Important:** If you want this modification type to be allowed, Change Carrier must also be allowed. | Header<br>Line<br>Release |
| Change Contact Info | A modification can be made the fields for the Buyer/Seller contact information associated with an order document's header. | Header |

***Table B–1 Order Document Modification Types***

| Modification Types | Description | Modification Levels |
|---|---|---|
| Change Cost | A adjustment can be made to the Unit Cost field associated with an order document's release or release line. | Release<br>Release Line |
| Change Currency | The currency associated with an order document's header can be changed. Upon a change to the currency, Selling and Fulfillment Foundation automatically re-prices the order. However, pre-existing charges and taxes have to be converted manually. | Header |
| Change Custom Date | A modification can be made to the date type fields used for order monitoring associated with an order document's header, line, or release.<br>The following custom date fields can be modified when this modification type is allowed:<br>• Requested<br>• Expected<br>• Actual<br>For example, if there is a delay in a release's processing, you can change the expected delivery date. | Header<br>Line<br>Release |

***Table B–1 Order Document Modification Types***

| Modification Types | Description | Modification Levels |
|---|---|---|
| Change Delivery Code | A modification can be made to the Delivery Code field associated with an order document's header, line, or release.<br><br>For example, if you want to indicate that an order's freight charges are paid by the Enterprise, you can choose the ENTERPRISE delivery code. | Header<br>Line<br>Release |
| Change Delivery Method | A product order line indicates how the product id sent to its final destination. It can be changed to SHIP, DELIVER, or PICKUP. | Line |
| Change Expiration Date | A modification can be made to the expiration date associated with an order document's negotiation. | Negotiation |
| Change Freight Terms | A modification can be made to the Freight Terms field associated with an order document's header, line, or release.<br><br>For example, you can change an order line's freight term from CIF (Cost Insurance and Freight) to CFR (Cost and Freight). | Header<br>Line<br>Release |

***Table B–1 Order Document Modification Types***

| Modification Types | Description | Modification Levels |
|---|---|---|
| Change Instruction | A modification can be made to an instruction associated with an order document's header, line, or shipment.<br>The following instruction fields can be modified when this modification type is allowed:<br>• Instruction Type<br>• Text<br>• URL | Header<br>Line<br>Shipment<br>Receipt |
| Change Item Description | A modification can be made to the Description field of an item associated with an order document's line. | Line |
| Change Iteration | A modification can be made to the iteration fields associated with an order document's header or line.<br>For example, you can change the next iteration date of a master order to a time in the future. | Header<br>Line |
| Change Mark For | A modification can be made to the fields of the mark for address associated with an order document's header, line, or release. | Header<br>Line<br>Release |
| Change Order Name | A modification can be made to the Order Name field associated with an order document's header. | Header |

*Table B–1 Order Document Modification Types*

| Modification Types | Description | Modification Levels |
|---|---|---|
| Change Other Attributes | A modification can be made to fields that do not have system or user-defined modification types associated with them. | Header<br>Line<br>Release<br>Negotiation<br>Negotiation Line<br>Shipment |
| Change Other Relationships | Not used in this version. | Shipment |
| Change Payment Method | A modification can be made to the Payment Type field associated with an order document's header or release.<br>For example, you can change an order's payment type from Check to Credit Card. | Header<br>Release |
| Change Payment Rule ID | The Payment Rule field associated with an order document's header can be changed.<br>For example, you can change the payment rule from the default rule to a custom rule that pertains to the order. | Header |
| Change Payment Status | The Payment Status field associated with an order document's header can be changed.<br>For example, you can change an order's payment status from Await Authorization to Authorized. | Header |
| Change Price | Charges can be added to an order document's header or line. | Header<br>Line |

***Table B–1 Order Document Modification Types***

| Modification Types | Description | Modification Levels |
|---|---|---|
| Change Receiving Node | The Receiving Node field associated with an order document's line can be changed.<br>For example, if for some reason it has been determined that an order line's original receiving node cannot receive the line, you can change it to another receiving node. | Line |
| Change References | A modification can be made to the name/value pair in the YFS_REFERENCE_TABLE using APIs. | Header<br>Line |
| Change Requested Ship Date | A modification can be made to the Requested Ship Date associated with an order document's header, line, or release.<br>For example, if the customer decides they want an order to be shipped on a date later than what they originally requested, you can change the requested shipment date. | Header<br>Line<br>Release |
| Change Schedule | A modification can be made to schedule attributes, such as expected ship date, expected delivery date, and lot number, associated with an order document's header, line, release, or release line. | Header<br>Line<br>Release<br>Release Line |

*Table B–1 Order Document Modification Types*

| Modification Types | Description | Modification Levels |
|---|---|---|
| Change Schedule Rule ID | A modification can be made to the schedule rule associated with an order document's header. This allows the user to select the scheduling rule they want to use for the order from the Scheduling Rule drop-down list on the Schedule Order popup window. | Header |
| Change Ship Node | The Ship Node field associated with an order document's header or line can be changed.<br>For example, if for some reason it has been determined that an order line's original ship node cannot handle the order line, you can change it to another node. | Header<br>Line |
| Change Ship To | A modification can be made to the fields of a ship to address associated with an order document's header, line, or release. | Header<br>Line<br>Release |
| Change Status | The order status (such as, Created) associated with an order document's header, line, release, release line, or negotiation can be changed.<br>**Note:** Only order statuses existing in process type repositories are affected by this modification type. Actions performed against order documents, such as putting an order on hold or canceling an order, are not impacted. | Header<br>Line<br>Release<br>Release Line<br>Negotiation |

*Table B–1 Order Document Modification Types*

| Modification Types | Description | Modification Levels |
|---|---|---|
| Change Tax | A modification can be made to the Tax Amount associated with an order document's header or line. | Header<br>Line |
| Delete Shipment | An order document's shipment can be deleted. | Shipment |
| Hold | An order document's header or release can be manually put on hold.<br>For example, you may want to perform a security check on a particular Buyer, you can then place the order on hold until you clear the necessary information before the order is scheduled. | Header<br>Release |
| Include In Load | An order document's shipment can be included in a load document. | Shipment |
| Include Shipment in Delivery Plan | An order document's shipment can be included in a delivery plan. | Shipment |
| Pack Shipment | An order document's shipment can be packed. | Shipment |
| Price Program | The price program associated with an order document's header can be changed. | Header |
| Receipt Complete | An order document's receipt can be marked as complete. | Receipt |
| Release from Hold | An order document's header can be released from hold. | Header |
| Remove Delivery Line From Product Line Association | Delivery lines can be removed from product order lines. | Line |

*Table B–1 Order Document Modification Types*

| Modification Types | Description | Modification Levels |
|---|---|---|
| Remove Line | A line can be removed from an order document's header, line, and shipment. | Header<br>Line<br>Shipment |
| Remove Option | Options can be removed from delivery and provided services. | Line |
| Remove Product Line From Delivery Line Association | Product lines can be removed from delivery lines. | Line |
| Remove Product Line From Service Line Association | Product lines can be removed from provided service order lines. | Line |
| Remove Service Line From Product Line Association | Provided service lines can be removed from product order lines. | Line |
| Remove Shipment From Delivery Plan | An order document's shipment can be removed from a delivery plan. | Shipment |
| Short | An order document's header, line, release, release line, and receipt can be shorted. This occurs when there is a shortage in the expected quantity. | Header<br>Line<br>Release<br>Release Line<br>Receipt |
| Split Line | An order document's line or release line can be split into multiple lines. | Line<br>Release Line |
| Unpack Shipment | An order document's shipment can be unpacked. | Shipment |

*Table B–1 Order Document Modification Types*

| Modification Types | Description | Modification Levels |
|---|---|---|
| Unreceive | An order document's receipt can be fully or partially unreceived. This moves the quantity you are identifying as unreceived back to Shipped status. | Receipt |
| Unschedule | An order document's header or line can be unscheduled from a scheduled node. This cancels any inventory that has been reserved for the order at the scheduled node. | Header<br>Line |

# C

# Condition Builder Attributes

Statements in the condition builder are built using attributes that are defined throughout the Applications Manager. This appendix describes all of those attributes for each process type.

Click one of the links below to be taken to the appropriate condition builder attributes description.

### Sales Order

- Order Fulfillment
- Order Negotiation
- Outbound Shipment
- Sales Order Receipt

### Planned Order

- Planned Order Execution
- Planned Order Negotiation

### Return Order

- Reverse Logistics
- Return Shipment
- Return Receipt

### Template Order

- Template Order

### Purchase Order

- Purchase Order Execution
- Purchase Order Negotiation
- Inbound Shipment
- Purchase Order Receipt

### Transfer Order

- Transfer Order Execution
- Transfer Order Delivery
- Transfer Order Receipt

### Master Order

- Master Order Fulfillment

### Quote

- Quote Fulfillment

### Load

- Load Execution

### General

- General
- WMS Putaway
- WMS Layout Definition
- WMS Inventory
- Trailer Loading
- Task Execution
- Move Request Execution
- Manifesting
- Over Pack Build

**Count**

- Count Execution

**Container**

- Pack Process

**Wave**

- Outbound Picking

**Work Order**

- VAS Process

**Opportunity**

- Opportunity Fulfillment

**Item-Based Allocation (IBA)**

- Item-Based Allocation (IBA) Order

# C.1 Sales Order

## C.1.1 Order Fulfillment

***Table C–1 Order Fulfillment Condition Builder Attributes***

| Attribute | Description |
|---|---|
| **Order Attributes** | |
| Condition Variable 1 | A variable that can be used for condition building. This is an existing field in the YFS_ ORDER_LINE database table, and can be used to create conditions without extending the database. |
| Condition Variable 2 | A variable that can be used for condition building. This is an existing field in the YFS_ ORDER_LINE database table, and can be used to create conditions without extending the database. |

*Table C–1 Order Fulfillment Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Delivery Method | The delivery method of the order (shipment, pickup or delivery). |
| Disposition Code | The disposition code of the item. This field is only applicable for Reverse Logistics and Supply Collaboration. |
| Line Type | The type of the order line. Selling and Fulfillment Foundation has no application logic associated with the order line type. This field can be set up as per your business practices. |
| Order Type | The type of the order. Selling and Fulfillment Foundation has no application logic associated with the order type. This field can be set up as per your business practices. |
| Payment Status | The payment status of the order. |
| Sale Voided | The flag indicating whether the order is voided. |
| Transaction ID | The ID of the last transaction that was run on the order. |
| **Participant Attributes** | |
| Bill To ID | The ID of the bill to address for the order. |
| Buyer Organization Code | The code of the organization that is buying the goods or services. |
| Enterprise Code | The code of the enterprise on the order. |
| Receiving Node | The node that receives the shipment for the order. |
| Seller Organization Code | The code of the organization that is selling the goods or services. |
| Ship Node | The node that ships the shipment for the order. |
| Ship Node Interface Type | The interface type of the ship node on the order (External Application, Console, Sterling WMS, or WMS 6.2). |
| Ship To ID | The ID of the ship to address for the order. |

*Table C–1 Order Fulfillment Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Supplier Code | The code of the supplier for the order. |
| **Item Attributes** | |
| Item ID | The ID of the item on the order line. |
| Item Group Code | The group code of the service item. For example, if the service is a provided service item, then the item group code is PS. |
| Product Line | The product line of the item on the order line. |
| **Sourcing Attributes** | |
| Fulfillment Type | The fulfillment type of the order. |
| Intentional Backorder | The flag indicating whether the order was intentionally dropped into backordered status at order creation. |
| Is Firm Predefined Node | The flag indicating whether the node on the order is a firm predefined node. |
| Order Sourcing Classification | The order sourcing classification of the order. |
| Reservation Mandatory | The flag indicating whether the reservation is mandatory. |
| **Related Order Attributes** | |
| Chain Type | The chain type of the order. |
| Is Chained Line | The flag indicating whether the order line is chained with another order line. |
| Is Derived Line | The flag indicating whether the order line is derived from another order line. |

*Table C–1 Order Fulfillment Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Order Purpose | The purpose of the order. If this is an exchange order, this field is set to EXCHANGE. |
| {Enter Your Own Attribute} | A customizable condition builder attribute. For more information about customizing this field, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br>**Note:** This field is limited only to unexposed key attributes that are pre-defined by Selling and Fulfillment Foundation as opposed to any XML attribute that you can enter. |

## C.1.2 Order Negotiation

*Table C–2 Order Negotiation Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Enterprise Code | The code of the enterprise on the order. |
| Initiator Organization Code | The code of the organization that initiates the negotiation. |
| Negotiator Organization Code | The code of the organization that can accept, counter-offer, or reject the initiator's offer. |
| Negotiation Pipeline Key | The key of the negotiation pipeline this order is going through. |
| Negotiation Number | The negotiation number of this order. |
| Negotiation Rule Key | The key of the negotiation rule for this order. |
| Header Entity | The entity for which the negotiation was initiated. Currently, the only applicable entity is Order. |
| Negotiation Status | The status of the negotiation for this order. |
| Document Type | The document type for this order. Typical value is Sales Order. |
| Freight Terms | The freight terms for this order. |

*Table C–2 Order Negotiation Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Payment Terms | The payment terms for this order. |
| {Enter Your Own Attribute} | A customizable condition builder attribute. For more information about customizing this field, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br>**Note:** This field is limited only to unexposed key attributes that are pre-defined by Selling and Fulfillment Foundation as opposed to any XML attribute that you can enter. |

## C.1.3 Outbound Shipment

*Table C–3 Outbound Shipment Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Enterprise Code | The code of the enterprise on the outbound shipment. |
| Buyer Organization Code | The code of the organization that is buying the goods or services. |
| Seller Organization Code | The code of the organization that is selling the goods or services. |
| Ship Node | The node that ships this shipment. |
| Ship Node Interface Type | The interface type of the ship node on the order (External Application, Console, Sterling WMS, or WMS 6.2). |
| Receiving Node | The node that receives this shipment. |
| Ship Mode | The shipment mode that is used for the shipment. For example, Parcel, Truck Load, Less-Than Truck Load. |
| Freight Terms | The freight terms for this shipment. |
| Carrier Type | The shipment's carrier type for this shipment. |
| Hazardous Materials Flag | The flag indicating whether these materials are hazardous. |

*Table C–3 Outbound Shipment Condition Builder Attributes*

| Attribute | Description |
|---|---|
| ESP Check Required | The flag indicating whether an Economic Shipping Parameters check is required at shipment consolidation time. |
| Is Appointment Required | The flag indicating whether an appointment is required for a service execution. |
| Routing Guide Maintained | The flag indicating whether a routing guide is maintained for this shipment. |
| Carrier | The carrier for the shipment. |
| Real-time Integration with WMS 6.2 | The flag indicating whether the node this shipment is shipping from is integrating with the Sterling WMS. Setting this field to N means that you are integrating with WMS 6.2, or any other warehouse management system. |
| Manually Entered | The flag indicating whether or not the shipment was entered through the Console. |
| Delivery Code | The code of the entity that pays for the transportation costs. |
| Country | The country that the shipment is being shipped to. |
| Delivery Method | The delivery method of the shipment (shipment, pickup or delivery). |
| Is Serial Requested | The flag indicating whether the shipment has any line with a specific serial number passed. If that is the case, a different outbound shipment process can be selected in the pipeline. |
| Is Provided Service | The flag indicating whether the shipment has an associated provided service item. |

*Table C–3 Outbound Shipment Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Shipment Type | Indicates a set of shipments that are of the same nature. |
| {Enter Your Own Attribute} | A customizable condition builder attribute. For more information about customizing this field, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br>**Note:** This field is limited only to unexposed key attributes that are pre-defined by Selling and Fulfillment Foundation as opposed to any XML attribute that you can enter. |

### C.1.4 Sales Order Receipt

The Sales Order Receipt condition builder attributes are identical to the Return Receipt attributes.

## C.2 Planned Order

### C.2.1 Planned Order Execution

The Planned Order Execution condition builder attributes are identical to the Order Fulfillment attributes.

### C.2.2 Planned Order Negotiation

The Planned Order Negotiation condition builder attributes are identical to the Order Negotiation attributes.

# C.3 Return Order

## C.3.1 Reverse Logistics

*Table C–4 Return Fulfillment Condition Builder Attributes*

| Attribute | Description |
|---|---|
| **Order Attributes** | |
| Condition Variable 1 | A variable that can be used for condition building. This is an existing field in the YFS_ ORDER_LINE database table, and can be used to create conditions without extending the database. |
| Condition Variable 2 | A variable that can be used for condition building. This is an existing field in the YFS_ ORDER_LINE database table, and can be used to create conditions without extending the database. |
| Delivery Method | The delivery method of the return (shipment, pickup or delivery). |
| Disposition Code | The disposition code of the item. |
| Line Type | The type of the return line. Selling and Fulfillment Foundation has no application logic associated with the return line type. This field can be set up as per your business practices. |
| Order Type | The type of the return. Selling and Fulfillment Foundation has no application logic associated with the return type. This field can be set up as per your business practices. |
| Payment Status | The payment status of the return. |
| Sale Voided | The flag indicating whether the return is voided. |
| Transaction ID | The ID of the last transaction that was run on the return. |
| **Participant Attributes** | |
| Bill To ID | The ID of the bill to address for the return. |

*Table C–4 Return Fulfillment Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Buyer Organization Code | The code of the organization that is buying the goods or services. |
| Enterprise Code | The code of the enterprise on the return. |
| Receiving Node | The node that receives the shipment for the return. |
| Seller Organization Code | The code of the organization that is selling the goods or services. |
| Ship Node | The node that be ships the shipment for the return. |
| Ship Node Interface Type | The interface type of the ship node on the return (External Application, Console, Sterling WMS, or WMS 6.2). |
| Ship To ID | The ID of the ship to address for the return. |
| Supplier Code | The code of the supplier for the return. |
| **Item Attributes** | |
| Item ID | The ID of the item on the return line. |
| Item Group Code | The group code of the service item. For example, if the service is a provided service item, then the item group code is PS. |
| Product Line | The product line of the item on the return line. |
| **Sourcing Attributes** | |
| Fulfillment Type | The fulfillment type of the return. |
| Intentional Backorder | The flag indicating whether the return was intentionally dropped into backordered status at return creation. |
| Is Firm Predefined Node | The flag indicating whether the node on the return is a firm predefined node. |
| Order Sourcing Classification | The order sourcing classification of the return. |
| Reservation Mandatory | The flag indicating whether the reservation is mandatory. |

*Table C–4 Return Fulfillment Condition Builder Attributes*

| Attribute | Description |
|---|---|
| **Related Order Attributes** | |
| Chain Type | The chain type of the return. |
| Is Chained Line | The flag indicating whether the return line is chained with another return line. |
| Is Derived Line | The flag indicating whether the return line is derived from another return line. |
| Order Purpose | This field is only applicable to sales orders. |
| {Enter Your Own Attribute} | A customizable condition builder attribute. For more information about customizing this field, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br>**Note:** This field is limited only to unexposed key attributes that are pre-defined by Selling and Fulfillment Foundation as opposed to any XML attribute that you can enter. |

## C.3.2 Return Shipment

The Return Shipment condition builder attributes are identical to the Outbound Shipment attributes.

## C.3.3 Return Receipt

*Table C–5 Return Receipt Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Document Type | The document type on the receipt. Typical value is Return Order. |
| Enterprise Code | The code of the enterprise that owns the receipt. |
| Seller Organization Code | The code of the organization that is selling the goods or services. |
| Ship Node | The node where the shipment was shipped out of. |

*Table C–5 Return Receipt Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Buyer Organization Code | The code of the organization that is buying the goods or services. |
| Receiving Node | The node where the shipment was received. |
| Receiving Node Interface Type | The interface type of the receiving node on the order (External Application, Console, Sterling WMS, or WMS 6.2). |
| Ship Mode | The shipment mode that is used for the shipment. For example, Parcel, Truck Load, Less-Than Truck Load. |
| Freight Terms | The freight terms on the receipt. |
| Carrier Type | The carrier type on the receipt. |
| Is Hazardous Material | The flag indicating whether there are hazardous materials that are being received. |
| Is Inspection Pending | The flag indicating whether there is an inspection pending on this return. |
| Is Receiving Node Integrated Real Time | The flag indicating whether the receiving node is integrating with WMS 6.2, or with another WMS system. |
| {Enter Your Own Attribute} | A customizable condition builder attribute. For more information about customizing this field, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br>**Note:** This field is limited only to unexposed key attributes that are pre-defined by Selling and Fulfillment Foundation as opposed to any XML attribute that you can enter. |

## C.4 Template Order

The Template Order condition builder attributes are identical to the Order Fulfillment attributes.

# C.5 Purchase Order

## C.5.1 Purchase Order Execution

*Table C–6 Purchase Order Execution Condition Builder Attributes*

| Attribute | Description |
|---|---|
| **Order Attributes** | |
| Condition Variable 1 | A variable that can be used for condition building. This is an existing field in the YFS_ ORDER_LINE database table, and can be used to create conditions without extending the database. |
| Condition Variable 2 | A variable that can be used for condition building. This is an existing field in the YFS_ ORDER_LINE database table, and can be used to create conditions without extending the database. |
| Delivery Method | The delivery method of the inbound order (shipment, pickup or delivery). |
| Disposition Code | The disposition code of the item. |
| Line Type | The type of the inbound order line. Selling and Fulfillment Foundation has no application logic associated with the inbound order line type. This field can be set up as per your business practices. |
| Order Type | The type of the inbound order. Selling and Fulfillment Foundation has no application logic associated with the inbound order type. This field can be set up as per your business practices. |
| Payment Status | The payment status of the inbound order. |
| Sale Voided | The flag indicating whether the inbound order is voided. |
| Transaction ID | The ID of the last transaction that was run on the inbound order. |
| **Participant Attributes** | |

*Table C–6 Purchase Order Execution Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Bill To ID | The ID of the bill to address for the inbound order. |
| Buyer Organization Code | The code of the organization that is buying the goods or services. |
| Enterprise Code | The code of the enterprise on the inbound order. |
| Receiving Node | The node that receives the shipment for the inbound order. |
| Seller Organization Code | The code of the organization that is selling the goods or services. |
| Ship Node | The node that ships the shipment for the inbound order. |
| Ship Node Interface Type | The interface type of the ship node on the inbound order (External Application, Console, Sterling WMS, or WMS 6.2). |
| Ship To ID | The ID of the ship to address for the inbound order. |
| Supplier Code | The code of the supplier for the inbound order. |
| **Item Attributes** | |
| Item ID | The ID of the item on the inbound order line. |
| Item Group Code | The group code of the service item. For example, if the service is a provided service item, then the item group code is PS. |
| Product Line | The product line of the item on the inbound order line. |
| **Sourcing Attributes** | |
| Fulfillment Type | The fulfillment type of the inbound order. |
| Intentional Backorder | The flag indicating whether the inbound order was intentionally dropped into backordered status at inbound order creation. |
| Is Firm Predefined Node | The flag indicating whether the node on the inbound order is a firm predefined node. |

*Table C–6 Purchase Order Execution Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Order Sourcing Classification | The order sourcing classification of the inbound order. |
| Reservation Mandatory | The flag indicating whether the reservation is mandatory. |
| **Related Order Attributes** | |
| Chain Type | The chain type of the inbound order. |
| Is Chained Line | The flag indicating whether the inbound order line is chained with another inbound order line. |
| Is Derived Line | The flag indicating whether the inbound order line is derived from another inbound order line. |
| Order Purpose | This field is only applicable to sales orders. |
| {Enter Your Own Attribute} | A customizable condition builder attribute. For more information about customizing this field, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br>**Note:** This field is limited only to unexposed key attributes that are pre-defined by Selling and Fulfillment Foundation as opposed to any XML attribute that you can enter. |

## C.5.2 Purchase Order Negotiation

*Table C–7 Purchase Order Negotiation Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Enterprise Code | The code of the enterprise on the inbound order. |
| Initiator Organization Code | The code of the organization that initiates the negotiation. |
| Negotiator Organization Code | The code of the organization that can accept, counter-offer, or reject the initiator's offer. |
| Negotiation Pipeline Key | The key of the negotiation pipeline this inbound order is going through. |

*Table C–7 Purchase Order Negotiation Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Negotiation Number | The negotiation number of this inbound order. |
| Negotiation Rule Key | The key of the negotiation rule for this inbound order. |
| Header Entity | The entity for which the negotiation was initiated. Currently, the only applicable entity is Order. |
| Negotiation Status | The status of the negotiation for this inbound order. |
| Document Type | The document type for this inbound order. Typical value is Purchase Order. |
| Freight Terms | The freight terms for this inbound order. |
| Payment Terms | The payment terms for this inbound order. |
| {Enter Your Own Attribute} | A customizable condition builder attribute. For more information about customizing this field, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br>**Note:** This field is limited only to unexposed key attributes that are pre-defined by Selling and Fulfillment Foundation as opposed to any XML attribute that you can enter. |

## C.5.3 Inbound Shipment

The Inbound Shipment condition builder attributes are identical to the Outbound Shipment attributes.

## C.5.4 Purchase Order Receipt

The Purchase Order Receipt condition builder attributes are identical to the Return Receipt attributes.

# C.6 Transfer Order

## C.6.1 Transfer Order Execution

The Transfer Order Execution condition builder attributes are identical to the Order Fulfillment attributes.

## C.6.2 Transfer Order Delivery

The Transfer Order Delivery condition builder attributes are identical to the Outbound Shipment attributes.

## C.6.3 Transfer Order Receipt

The Transfer Order Receipt condition builder attributes are identical to the Return Receipt attributes.

# C.7 Master Order

## C.7.1 Master Order Fulfillment

***Table C–8 Master Order Fulfillment Condition Builder Attributes***

| Attribute | Description |
|---|---|
| **Master Order Attributes** | |
| Condition Variable 1 | A variable that can be used for condition building. This is an existing field in the YFS_ ORDER_LINE database table, and can be used to create conditions without extending the database. |
| Condition Variable 2 | A variable that can be used for condition building. This is an existing field in the YFS_ ORDER_LINE database table, and can be used to create conditions without extending the database. |
| Delivery Method | The delivery method of the order (shipment, pickup or delivery). |

*Table C–8 Master Order Fulfillment Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Disposition Code | The disposition code of the item. This field is only applicable for Reverse Logistics and Supply Collaboration. |
| Line Type | The type of the order line. Selling and Fulfillment Foundation has no application logic associated with the order line type. This field can be set up as per your business practices. |
| Order Type | The type of the order. Selling and Fulfillment Foundation has no application logic associated with the order type. This field can be set up as per your business practices. |
| Payment Status | The payment status of the order. |
| Sale Voided | The flag indicating whether the order is voided. |
| Transaction ID | The ID of the last transaction that was run on the order. |
| **Participant Attributes** | |
| Bill To ID | The ID of the bill to address for the order. |
| Buyer Organization Code | The code of the organization that is buying the goods or services. |
| Enterprise Code | The code of the enterprise on the order. |
| Receiving Node | The node that receives the shipment for the order. |
| Seller Organization Code | The code of the organization that is selling the goods or services. |
| Ship Node | The node that ships the shipment for the order. |
| Ship Node Interface Type | The interface type of the ship node on the order (External Application, Console, Sterling WMS, or WMS 6.2). |
| Ship To ID | The ID of the ship to address for the order. |
| Supplier Code | The code of the supplier for the order. |
| **Item Attributes** | |

*Table C–8 Master Order Fulfillment Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Item ID | The ID of the item on the order line. |
| Item Group Code | The group code of the service item. For example, if the service is a provided service item, then the item group code is PS. |
| Product Line | The product line of the item on the order line. |
| **Sourcing Attributes** | |
| Fulfillment Type | The fulfillment type of the order. |
| Intentional Backorder | The flag indicating whether the order was intentionally dropped into backordered status at order creation. |
| Is Firm Predefined Node | The flag indicating whether the node on the order is a firm predefined node. |
| Order Sourcing Classification | The order sourcing classification of the order. |
| Reservation Mandatory | The flag indicating whether the reservation is mandatory. |
| **Related Master Order Attributes** | |
| Chain Type | The chain type of the order. |
| Is Chained Line | The flag indicating whether the order line is chained with another order line. |
| Is Derived Line | The flag indicating whether the order line is derived from another order line. |
| Order Purpose | The purpose of the order. If this is an exchange order, this field is set to EXCHANGE. |
| {Enter Your Own Attribute} | A customizable condition builder attribute. For more information about customizing this field, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br>**Note:** This field is limited only to unexposed key attributes that are pre-defined by Selling and Fulfillment Foundation as opposed to any XML attribute that you can enter. |

# C.8 Quote

## C.8.1 Quote Fulfillment

The Quote Fulfillment condition builder attributes are identical to the Order Fulfillment condition builder attributes.

# C.9 Load Execution

***Table C–9 Load Execution Condition Builder Attributes***

| Attribute | Description |
|---|---|
| Load Type | The type of the load document. |
| Enterprise Code | The code of the enterprise on the load document. |
| Owner Organization Code | The code of the organization that owns the load document. |
| Carrier | The carrier used to carry the load. |
| Carrier Service Code | The code of the carrier service used to carry the load. |
| Ship Mode | The shipment mode that is used for the shipment. For example, Parcel, Truck Load, Less-Than Truck Load. |
| Hazardous Material | The flag indicating whether hazardous materials are being carried in this load. |
| Origin Node | The node where the load originated from. |
| Destination Node | The node where the load is being shipped to. |

*Table C–9 Load Execution Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Multiple Load Stop | The flag indicating whether or not a shipment goes through multiple stops to load or unload additional shipments. |
| {Enter Your Own Attribute} | A customizable condition builder attribute. For more information about customizing this field, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br>**Note:** This field is limited only to unexposed key attributes that are pre-defined by Selling and Fulfillment Foundation as opposed to any XML attribute that you can enter. |

# C.10 General

*Table C–10 General Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Enterprise Code | The code of the enterprise. |
| Organization Code | The code of the organization. |
| Provider Organization Code | The code of the organization that provides the service. |
| Ship Node | The node that ships this shipment. |
| Supply Type | The supply type associated with the inventory status. Typical values are Onhand, Held, etc. |
| Item ID | The ID of the item on the order line. |
| Unit Of Measure | The unit of measure of the item. |
| Product Class | The inventory classification of an item based on the product's characteristics. Typical values are FQ - First Quality, SQ - Second Quality, etc. |

***Table C–10 General Condition Builder Attributes***

| Attribute | Description |
|---|---|
| Inventory Status | The inventory sub classification of the product, based on the results of the inventory control processes within the warehouse. Typical values are Good - Good Inventory, Damaged - Damaged inventory, Qlty-Hold - Quality Hold, etc. |
| Adjustment Type | The type of inventory adjustment. Typical values are Cycle Count, Receipt, Picking, Packing, Shipping, etc. |
| Alert Type | The type of alert raised when an exception occurs. |
| Carrier | The carrier used to carry the shipment. |
| Task Type | The Task Type applicable to a task. Typical values are Receipt, QC, Count, Replenishment, Retrieval, Putaway, VAS, Pack, Shipping, and Picking. |
| Assigned To User ID | The ID of the user to whom the task is assigned. |
| Task Status | The Task Status within the pipeline that the task travels through. Typical values are Open, Suggested, In Progress, Held, Completed, Canceled, etc. |
| Document Type | The document type for this order. Typical values are Sales Order, Purchase Order, Transfer Order, and Return Order. |
| SC UI Client Version | The Rich Client Platform application version number. |
| Activity Group ID | The identifier for the activity group. |
| {Enter Your Own Attribute} | A customizable condition builder attribute. For more information about customizing this field, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br>**Note:** This field is limited only to unexposed key attributes that are pre-defined by Selling and Fulfillment Foundation as opposed to any XML attribute that you can enter. |

## C.11 WMS Putaway

The WMS Putaway condition builder attributes are identical to the General attributes.

## C.12 WMS Layout Definition

The WMS Layout Definition condition builder attributes are identical to the General attributes.

## C.13 WMS Inventory

The WMS Layout Inventory condition builder attributes are identical to the General attributes.

## C.14 Trailer Loading

The Trailer Loading condition builder attributes are identical to the General attributes.

## C.15 Task Execution

The Task Execution condition builder attributes are identical to the General attributes.

## C.16 Move Request Execution

The Move Request Execution condition builder attributes are identical to the General attributes.

## C.17 Manifesting

The Manifesting condition builder attributes are identical to the General attributes.

## C.18 Over Pack Build

The Over Pack Build condition builder attributes are identical to the General attributes.

# C.19 Count Execution

***Table C–11 Count Execution Condition Builder Attributes***

| Attribute | Description |
|---|---|
| Enterprise Code | The code of the enterprise for which the count request is created. |
| Request Type | The type of count requested. |
| Count Program Name | The name of the count program for which the count request is created. |
| Node Key | The node where the count request is processed. |
| Zone ID | The zone where the count must be performed. |
| Location Size Code | The capacity of the location where the count must be performed. |
| Is LPN Level | The flag indicating whether the count tasks are be performed at the LPN level. |
| Is Case Level | The flag indicating whether the count tasks are be performed at the case level. |
| Is Pallet Level | The flag indicating whether the count tasks are be performed at the pallet level. |
| Is Item Level | The flag indicating whether the count tasks are be performed at the item level. |
| Is Resolvable | The flag indicating whether variance can be resolved for this count result. |
| Product Class | The inventory classification of an item based on the product's characteristics. Typical values are FQ - First Quality, SQ - Second Quality, etc. |
| Unit Of Measure | The unit of measure of the item that was counted. |
| Item Classification 1 | The first item classification attribute for determining the Count Strategy. |
| Item Classification 2 | The second item classification attribute for determining the Count Strategy. |

*Table C–11 Count Execution Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Item Classification 3 | The third item classification attribute for determining the Count Strategy. |
| Has Variance | The flag indicating whether the count request has a variance. |
| Has Absolute Variance | The flag indicating whether the count request has an absolute variance. |
| Variance Quantity | The difference in quantity (+/-) between the count result and system quantity. |
| Absolute Variance Quantity | The absolute difference between the count result and system quantity. |
| Variance Value | The difference in cost/value (+/-) between the count result and system quantity. |
| Absolute Variance Value | The absolute difference in cost/value between the count result and system quantity. |
| Has Variance With Previous Count | The flag indicating whether the variance between the current count result and previous count results displays. |
| {Enter Your Own Attribute} | A customizable condition builder attribute. For more information about customizing this field, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br>**Note:** This field is limited only to unexposed key attributes that are pre-defined by Selling and Fulfillment Foundation as opposed to any XML attribute that you can enter. |

# C.20 Pack Process

*Table C–12 Pack Process Condition Builder Attributes*

| Attribute | Description |
|---|---|
| **Node Attributes** | |
| Ship Node | The node that ships this shipment. |

*Table C–12 Pack Process Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Receiving Node | The node that receives this shipment. |
| Ship from Ship Node Interface Type | The interface type of the ship node from which the shipment is shipped (External Application, Console, Sterling WMS, or WMS 6.2). |
| Ship from Supplier Code | The code of the supplier that is shipping the shipment. |
| Ship from DCM Integration Real Time | The flag indicating whether the node from which the shipment is shipped uses WMS 6.2. |
| Ship from Country | The code of the country from which the shipment is being shipped. |
| Ship to Ship Node Interface Type | The interface type of the ship node to which the shipment is shipped (External Application, Console, Sterling WMS, or WMS 6.2). |
| Ship to Supplier Code | The code of the supplier to whom the shipment is being shipped. |
| Ship to DCM Integration Real Time | The flag indicating whether the node to which the shipment is shipped uses WMS 6.2. |
| Ship to Country | The code of the country to which the shipment is being shipped. |
| **Organization Attributes** | |
| Enterprise Code | The code of the enterprise that owns the shipment. |
| Buyer Organization Code | The code of the organization that is buying the goods or services. |
| Seller Organization Code | The code of the organization that is selling the goods or services. |
| **Shipment Attributes** | |
| Ship Mode | The shipment mode that is used for the shipment. For example, Parcel, Truck Load, Less-Than Truck Load. |

*Table C–12 Pack Process Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Carrier | The carrier used to carry the shipment. |
| Freight Terms | The freight terms of the shipment. |
| Delivery Code | The code of the entity that pays for the transportation costs. |
| Pack And Hold | The flag indicating whether the shipment needs to be packed and put away for retrieval at a later date. |
| Shipment Container Count | The number of containers in the shipment. |
| Shipment Containerized Flag | The flag indicating the containerization state of the shipment. The values are: 01 - not containerized, 02 - containerization in progress and 03 - containerization completed. |
| **Container Attributes** | |
| Is Shipment Container | The flag indicating whether the container belongs to a shipment. |
| Is Load Container | The flag indicating whether the container is part of a load. |
| Is Inventory Pallet | The flag indicating whether the container is an inventory pallet. |
| Is Converted From LPN | The flag indicating whether the inventory container has been converted to a shipment container. |
| Is Serial Capture Pending | The flag indicating whether the serial capture is pending for the container. |
| Is Pack Process Complete | The flag indicating whether any more pack activities are pending for the container. |
| Is Product Placing Complete | The flag indicating whether placing the product into the container according to the system's suggestion has been completed. |
| Requires VAS | The flag indicating whether the container requires value added services. |

*Table C–12 Pack Process Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Has Child Containers | The flag indicating whether a container is a parent container having other containers. |
| Number of Items | The number of items contained in the container. |
| Container Type | The attribute that specifies whether a shipment container is a case or pallet. |
| {Enter Your Own Attribute} | A customizable condition builder attribute. For more information about customizing this field, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br>**Note:** This field is limited only to unexposed key attributes that are pre-defined by Selling and Fulfillment Foundation as opposed to any XML attribute that you can enter. |

## C.21 Outbound Picking

*Table C–13 Outbound Picking Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Activity Group ID | The identifier for the activity group. |
| Shipment Group ID | The identifier for the shipment group. |
| {Enter Your Own Attribute} | A customizable condition builder attribute. For more information about customizing this field, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br>**Note:** This field is limited only to unexposed key attributes that are pre-defined by Selling and Fulfillment Foundation as opposed to any XML attribute that you can enter. |

# C.22 VAS Process

*Table C–14 VAS Process Condition Builder Attributes*

| Attribute | Description |
|---|---|
| Enterprise Code | The code of the enterprise that owns the item or license plate. |
| Provider Organization Code | The code of the organization that provides the service. |
| Node Key | The node, where the work orders are run. |
| Purpose | The purpose for the work order (ORDER / STOCK / SHIP) |
| Service Item Group Code | The code of the service item group (KIT/DKIT/COMPL/INVC/PS) |
| Service Item ID | The identifier for the service Item. |
| Segment Type | The type of segment. This may be MTO (made to order) or MTC (made to customer). |
| Segment | The segment to which the inventory involved in the work order belongs. |
| Has Components | The flag indicating whether the work order has component items. |
| Status | The status of the work order. |
| Pre Call Status | The flag indicating the status of the pre-call process. |
| Appt Status | The status of the appointment. This is in sync with the service order line. The appointment status is used in case of provided service work order. |
| Number Of Attempts | The number of attempts made to run the work order. |
| Number Of Hours until Appointment | The number of hours left before the appointment for the service item. |
| Number Of Hours After Appointment | The number of hours after the last appointment for the service item. |

***Table C–14 VAS Process Condition Builder Attributes***

| Attribute | Description |
|---|---|
| Number Of Hours After Last Execution | The number of hours after the last attempt to run the service. |
| Last Execution Success | The flag indicating whether the last attempt to run the service was successful or not. |
| Open Work Order Flag | The flag indicating whether the execution of the work order has ended or not. |
| {Enter Your Own Attribute} | A customizable condition builder attribute. For more information about customizing this field, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br><br>**Note:** This field is limited only to unexposed key attributes that are pre-defined by Selling and Fulfillment Foundation as opposed to any XML attribute that you can enter. |

# C.23 Opportunity

## C.23.1 Opportunity Fulfillment

***Table C–15 Opportunity Fulfillment Condition Builder Attributes***

| Attribute | Description |
|---|---|
| **Opportunity Attributes** | |
| Opportunity ID | The ID of the opportunity. |
| Opportunity Name | The name of the opportunity. |
| Status | The status of the opportunity. |
| Currency Value | The currency value of the opportunity. |
| Probable Success Rate | The likelihood of whether an order will be created from the opportunity. |
| **Participant Attributes** | |
| Bill To ID | The ID of the bill to address for the opportunity. |
| Buyer Organization Code | The code of the organization that may buy the goods or services. |
| Enterprise Code | The code of the enterprise for the opportunity. |
| Owner User ID | The user ID of the opportunity owner. |
| Co-Owner User ID | The user ID of the opportunity co-owner. |
| Customer Contact ID | The ID of the customer contact for the opportunity. |
| Team Code | The code of the team that manages the opportunity. |
| {Enter Your Own Attribute} | A customizable condition builder attribute. For more information about customizing this field, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br>**Note:** This field is limited only to unexposed key attributes that are pre-defined by Selling and Fulfillment Foundation as opposed to any XML attribute that you can enter. |

# C.24 Item-Based Allocation (IBA) Order

***Table C–16 IBA Attributes***

| Attribute | Description |
|---|---|
| **Order Attributes** | |
| Exchange Type | The exchange type of the order. |
| Priority Code | Customizable priority code of the order. |
| Priority Number | The numeric priority code of the order. |
| Document Type | The document type for this order. Typical value is 0001 (Sales Order). |
| Order Type | The order classification attribute. This field can be used for reporting purposes or to build conditions for modeling your business process. Selling and Fulfillment Foundation has no default logic based on this field. |
| Entry Type | The channel through which this order was created. |
| Department Code | Department code to which the order was placed. |
| Search Criteria 1 | Customizable field for allowing searches. |
| Search Criteria 2 | Customizable field for allowing searches. |
| **Order Line** | |
| Line Type | The line type can be used in process modeling for pipeline determination or conditional processing. |
| Condition Variable 1 | A user-defined variable that can be used for condition building in process modeling. |
| Condition Variable 2 | A user-defined variable that can be used for condition building in process modeling. |
| **Shipping Attributes** | |
| Level of Service | The order or the line's level of service. |

*Table C–16 IBA Attributes*

| Attribute | Description |
|---|---|
| Ship To ID | The ship-to identifier. If a customer definition representing the buyer organization exists within Selling and Fulfillment Foundation, the ship-to ID can represent the Customer ID. Otherwise, the ship-to ID can represent the PersonID of the ship-to address or the receiving node of the order. |
| Carrier Service Code | The code of the carrier service used to carry the load. |
| **Participant Attributes** | |
| Enterprise Code | The code of the enterprise on the order. |
| Buyer Organization Code | The code of the organization that is buying the goods or services. |
| Seller Organization Code | The code of the organization that is selling the goods or services. |
| Bill To ID | The identifier of the customer to whom the order is being billed. |
| {Enter Your Own Attribute} | A customizable condition builder attribute. For more information about customizing this field, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* .<br>**Note:** This field is limited only to unexposed key attributes that are pre-defined by Selling and Fulfillment Foundation as opposed to any XML attribute that you can enter. |

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