Sterling Commerce
An AT&T Company

Sterling Logistics Management: Configuration Guide

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Preface

This manual describes how to use the Applications Manager.

Intended Audience

This manual is intended for use by system administrators and managers who need to configure the rules and business processes of Selling and Fulfillment Foundation as they pertain to their logistics 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, actions you can perform throughout the application, and important concepts you should be aware of before using the application.

Chapter 3, "Configuring Cross Application Carrier Services"

This chapter explains how you can configure codes to identify the different carrier services a Carrier uses to ship orders.

Chapter 4, "Configuring Cross Application Carrier Special Services"

This chapter explains how you can configure codes to identify the different carrier special services a Carrier uses to ship and deliver orders.

Chapter 5, "Configuring Cross Application Logistics Rules"

This chapter explains how you can configure logistics rules so that unique attributes of a shipment can be added to a load even without an existing shipment.

Chapter 6, "Configuring Transportation"

This chapter explains how you can record transportation or in-transit updates for a container.

Chapter 7, "Configuring a Document's Modification Reasons"

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

Chapter 8, "Configuring a Load Document's Hold Types"

This chapter explains how you can configure hold types applied on a load document. A load can be put on hold either manually or automatically by applying a particular hold type to it.

Chapter 9, "Configuring a Load Document's Pipeline"

This chapter explains how you can configure a load document's pipeline using process types.

Chapter 10, "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 11, "Configuring a Load Document's Charge Categories"

This chapter explains how you can define charge definitions that you can associate with orders and invoices through charge categories. These categories contain a group of related charge names that can be used when the particular category is used.

Chapter 12, "Configuring a Load 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 13, "Configuring a Load Document's Load Types"

This chapter explains how you can define codes for load types that appear on a load document.

Chapter 14, "Configuring a Shipment Document's Hold Types"

This chapter explains how you can configure hold types applied to a shipment document. A shipment can be put on hold either manually or automatically by applying a specific hold type on it.

Chapter 15, "Configuring a Load Document's Stop Types"

This chapter explains how you can modify codes for stop types that appear on a load document.

Chapter 16, "Configuring a Load Document's Modification Rules"

This chapter explains how you can configure a load document's modification rules.

Chapter 17, "Configuring an Order Document's Shipment Specific Components"

This chapter explains how you can configure rules and components specific to an order document's shipment process type.

Chapter 18, "Configuring Logistics Components"

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

Appendix A, "Time-Triggered Transaction Reference"

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

Appendix B, "Condition Builder Attributes"

This appendix 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.

Convention	Meaning
/ 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.
<INSTALL_DIR_OLD>	User-supplied location of the Selling and Fulfillment Foundation installation directory (for Release 8.0 and later). **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. 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). **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. For Releases 7.7, 7.9, and 7.11, this is the user-supplied location of the <YANTRA_HOME>/Runtime directory. 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. **Note:** This is only applicable for users upgrading from Releases 7.7, 7.9, or 7.11.

Convention	Meaning
<ANALYTICS_HOME>	User-supplied location of the Sterling Analytics installation directory. **Note:** This convention is used only in the *Selling and Fulfillment Foundation: Business Intelligence Guide*.
<COGNOS_HOME>	User-supplied location of the IBM Cognos 8 Business Intelligence installation directory. **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. **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 Logistics 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 should refer to the *Selling and Fulfillment Foundation: Customization Basics Guide* for information about extending Selling and Fulfillment Foundation. System Integrators should refer to the *Selling and Fulfillment Foundation: Integration Guide* for information about 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 all 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 outsourced 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 an 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 Logistics Management Configuration

The Sterling Logistics Management application is a collection of common components used for creating delivery plans in the Application Console.

A delivery plan is a complete sequence of movements needed to deliver one or more orders from one or multiple origins to one or multiple destinations. A delivery plan is comprised of shipments, loads, origins, stops, and destinations.

Shipment

A shipment is a delivery of one or more orders and order lines from a single shipper to a single consignee. A shipment can be carried through multiple loads and by multiple carriers.

Load

A load carries one or more complete shipments (never a partial shipment) between two points. A load has one origin and one destination, but it can have multiple intermediate stops. Shipments can be added to a load at its origin or any intermediate stop and can be dropped off at the load destination or any intermediate stop.

Origin

An origin is the node the load originally ships from.

Stop

A stop is any location where a shipment is picked up or dropped off. A load has a stop sequence that determines its travel route.

Destination

A destination is the last node or address in the load's travel route where all remaining shipments in a load are dropped off.

In the Applications Manager you can use the Logistics Management configuration grouping to establish the following aspects of Selling and Fulfillment Foundation for your business applications:

- Carrier Services
- Carrier Special Services
- Modification Reasons
- Instruction Types
- Charge Categories
- Purge Criteria
- Load Type
- Stop Type
- Modification Rules

- Logistics Components

1.2.1 Carrier Services

Carrier Services is used for defining codes that identify the different carrier services a Carrier can use to ship orders. For more information about Carrier Services, see Chapter 3, "Configuring Cross Application Carrier Services".

1.2.2 Carrier Special Services

Carrier Special Services is used for defining codes that identify the different carrier special services a Carrier can use to ship and deliver orders. For more information about Carrier Special Services, see Chapter 4, "Configuring Cross Application Carrier Special Services".

1.2.3 Modification Reasons

Modification Reasons is used to 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 7, "Configuring a Document's Modification Reasons".

1.2.4 Load Execution Process Model

You can define a load document's business process workflow by creating process type pipelines. A **process type pipeline** is a series of transactions and statuses that guide a load document through a predefined process. A pipeline consists of the different statuses a document goes through during a load's planning. You can also set up transactions consisting of events, actions, and conditions, as they pertain to the pipeline you are configuring. For more information about Load Execution Process Model, see Chapter 9, "Configuring a Load Document's Pipeline".

1.2.5 Instruction Types

Instruction Types is used to define the common codes used when adding special instructions to a load document. For more information about Instruction Types, see Chapter 10, "Configuring a Document's Instruction Types".

1.2.6 Charge Categories

Charge Categories is used to define **charge definitions** that you can associate with orders and invoices through charge categories. These categories contain a group of related charge names that can be used when the particular category is used. For more information about Charge Categories, see Chapter 11, "Configuring a Load Document's Charge Categories".

1.2.7 Purge Criteria

Purge Criteria is used to define the parameters used when purging load document related records from the system. For more information about Purge Criteria, see Chapter 12, "Configuring a Load Document's Purge Criteria".

1.2.8 Load Type

Load Type is used to define codes for load types that appear on a load document. For more information about Load Type, see Chapter 13, "Configuring a Load Document's Load Types".

1.2.9 Stop Type

Stop Type is used to modify codes for stop types that appear on a load document. For more information about Stop Types, see Chapter 15, "Configuring a Load Document's Stop Types".

1.2.10 Modification Rules

Modification Rules is used to define rules that determine when modifications can be made during a load document's life cycle. For more information about Modification Rules, see Chapter 16, "Configuring a Load Document's Modification Rules".

1.2.11 Logistics Components

Logistics Components is used to define the different logistics related functionality throughout the business application module. For more information about Logistics Components, see Chapter 18, "Configuring Logistics Components".

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. 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. 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 Carrier Services

You can set up codes to identify the different carrier services a Carrier uses to ship orders.

The following are examples of different carrier service codes:

- Standard Mail
- 2nd Day Air
- Ground

You can use the Carrier Services branch for:

- Creating a Carrier Service Code
- Modifying a Carrier Service Code
- Deleting a Carrier Service Code
- Creating a Carrier Delivery Schedule
- Modifying a Carrier Delivery Schedule
- Deleting a Carrier Delivery Schedule

3.1 Creating a Carrier Service Code

To create a carrier service code:

1. From the tree in the application rules side panel, choose Cross Application > Carrier Services. The Carrier Services window displays in the work area.
2. Choose . The Carrier Service Details pop-up window displays.

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

Table 3–1 Carrier Service Details Pop-Up Window

Field	Description
Carrier Service Code	Enter the name of the carrier service.
Carrier Service Description	Enter a brief description of the carrier service.
Minimum Transit Days	Enter the minimum number of days that a carrier service could take to deliver a shipment. For example, Ground service could have a minimum of 3 transit days.

Table 3–1 Carrier Service Details Pop-Up Window

Field	Description
Distance Per Day	Enter the maximum distance that the service travels each transit day. **Note:** This number is used for order line scheduling. This value is only used if the Use Advanced Transit Time Calculations flag on the Other Rules tab under Distributed Order Management > Cross Application > Logistics > Logistics Attributes is selected. For more information about this field, see the *Sterling Distributed Order Management: Configuration Guide*.
Maximum Transit Days	Enter the maximum number of days that a carrier service allows for delivery. For example, Ground service has a maximum of 5 transit days.
Carrier Type	Select a carrier type from the drop-down list.
Used For Ordering	Check this box to enable the carrier service to be selected during order creation.
Allow Up To <> Days Of Non-Transit Time For An Item	Enter the maximum number of days a carrier service holds deliveries that can't be delivered on a scheduled delivery day. If no value is entered, the carrier holds deliveries for an unlimited number of days. Use this option to calculate shipment dates. See the *Selling and Fulfillment Foundation: Product Concepts Guide* guide for more information.
Delivery Schedule List	Displays the delivery schedules for the selected carrier. You can add, modify, and delete schedules in this list.

3.1.1 Modifying a Carrier Service Code

To modify a carrier service code:

1. From the tree in the application rules side panel, choose Cross Application > Carrier Services. The Carrier Services window displays in the work area.
2. Select the applicable carrier service code and choose . The Carrier Service Details pop-up window for the carrier displays.
3. Enter information in the applicable fields. Refer to Table 3–1 for field value descriptions.
4. Choose .

3.1.2 Deleting a Carrier Service Code

To delete a carrier service code:

1. From the tree in the application rules side panel, choose Cross Application > Carrier Services. The Carrier Services window displays in the work area.
2. Select the applicable carrier service code and choose .

3.2 Creating a Carrier Delivery Schedule

Selling and Fulfillment Foundation lets you define an unlimited number of delivery schedules for a carrier. You can set up schedules for specific time periods, such as months or seasons, and configure overrides in the schedule for days, such as holidays.

For example, you can configure a holiday schedule in which the carrier transports shipments Sunday through Saturday and makes deliveries Monday through Saturday. You can configure exceptions to the schedule, such as changing a delivery on Dec. 24 from 6 to 4 p.m.

To create a delivery schedule:

1. From the tree in the application rules side panel, choose Cross Application > Carrier Services. The Carrier Services window displays in the work area.
2. Select the applicable carrier service code and choose . The Carrier Service Details popup window for the carrier displays.
3. Select on the Delivery Schedule List window. The Delivery Schedule Details window displays.
4. Enter information in the applicable fields. Refer to Table 3–2 for field value descriptions.

5. Choose

Table 3–2 Delivery Schedule Details Window

Field	Description
Effective From Date	Select the date that this carrier schedule is applicable from.
Effective To Date	Select the date that this carrier schedule is applicable to. Ensure that you specify a date range that is not already in use by another delivery schedule. For example, if a delivery schedule has a date range of January through June, you cannot specify a date range of May through July for a different delivery schedule.
Delivers On	Check the days of the week when this carrier delivers shipments.
Transfers On	Check the days of the week when this carrier transports shipments.

Field	Description
Delivery Date Overrides	
Override Date	Select the date for which you want to override the carrier's delivery/transport schedule.
Can Transfer	Select Yes to allow transfer or No to disallow transfer on the specified override date.
Can Deliver	Select Yes to allow delivery or No to disallow delivery on the specified override date.

3.2.1 Modifying a Carrier Delivery Schedule

To modify a carrier delivery schedule:

1. From the tree in the application rules side panel, choose Cross Application > Carrier Services. The Carrier Services window displays in the work area.
2. Select the applicable carrier service code and choose . The Carrier Service Details popup window for the carrier displays.
3. In the Delivery Schedule List, select the applicable delivery schedule and choose . The Delivery Schedule Details window displays.
4. Enter information in the applicable fields. Refer to Table 3–2 for field value descriptions.
5. Choose

3.2.2 Deleting a Carrier Delivery Schedule

To delete a carrier delivery schedule:

1. From the tree in the application rules side panel, choose Cross Application > Carrier Services. The Carrier Services window displays in the work area.
2. Select the applicable carrier service code and choose . The Carrier Service Details popup window for the carrier displays.
3. In the Delivery Schedule List, select the applicable delivery schedule and choose .

4

Configuring Cross Application Carrier Special Services

You can set up codes to identify the different carrier special services that a Carrier uses while shipping and delivering orders.

The following are examples for carrier special service codes:

- Adult Signature Required
- Cash on Delivery
- COD
- Contract Print Return Label
- Declared Value Insurance
- Delivery Confirmation
- Hazardous Material
- Hold For PickUp
- Hundred Weight
- Online Call Tag
- Saturday Delivery
- Saturday PickUp
- Ship Alert
- Ship Notification
- Signature Required
- Sunday Delivery

- Verbal Confirmation

You can use the Carrier Special Services branch for:

- Creating a Carrier Special Service Code
- Modifying a Carrier Special Service Code
- Deleting a Carrier Special Service Code

4.1 Creating a Carrier Special Service Code

To create a carrier special service code:

1. From the tree in the application rules side panel, choose Cross Application > Carrier Special Services. The Carrier Special Services window displays in the work area.
2. Enter information in the applicable fields. Refer to Table 4–1 for field value descriptions.
3. Choose .

Carrier Special Services (DEFAULT)

	Carrier Special Services Code	Description
	1ZASD	Air Service Document
	1ZCOD	Collect on Delivery
	ADULTSIGN	Adult Signature Required
	ASD	Air Service Document
	CONPRLBL	Contract Print Return Label
	DECLVAL	Declared Value Insurance
	DELCONF	Delivery Confirmation
	HLDFRPCKUP	Hold For PickUp
	ONLCALLTAG	Online Call Tag
	SATDELI	Saturday Delivery
	SHPNTFY	Ship Notification
	SIGNREQD	Signature Required
	STDCALLTAG	Standard Call Tag
	TAGLESSCOD	Tagless COD
	VRBLCONF	Verbal Confirmation
*		

Results 15 Of 15

Table 4–1 Carrier Special Services Window

Field	Description
Carrier Special Services Code	Enter the name of the carrier special service.
Description	Enter a brief description of the carrier special service.

4.2 Modifying a Carrier Special Service Code

To modify a carrier special service code:

1. From the tree in the application rules side panel, choose Cross Application > Carrier Special Services. The Carrier Special Services window displays in the work area.
2. Modify information in the applicable fields. Refer to Table 4–1 for field value descriptions.
3. Choose .

4.3 Deleting a Carrier Special Service Code

To delete a carrier special service code:

1. From the tree in the application rules side panel, choose Cross Application > Carrier Special Services. The Carrier Special Services window displays in the work area.
2. Select the applicable carrier special service code and choose .

5

Configuring Cross Application Logistics Rules

Any transaction between the buyer and the seller is expected to follow a sequence like creating a shipment, load, and transit updates. Most often this sequence is not followed and the buyer receives the information in a more random sequence. Often, without having an existing shipment, a shipment cannot be added to a load. But, by enabling this logistics rule, some unique attributes of the shipment can be added to a load even without an existing shipment, such as:

- ShipmentNo, ShipNode, and SellerOrganizationCode
- BOLNo and ShipNode
- PRONo and ShipNode

The getLoadDetails API returns these shipment attributes from the load shipment.

5.1 Creating a Logistics Rule

To create a logistics rule:

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

Table 5–1 Logistics Rule

Field	Description
Allow Addition of Shipments not Available on System to a Load	Check this box to allow the creation of a load with shipments even when shipments do not exist in the system. When a new shipment is created in the system, it checks if this shipment is previously associated with any load and updates the load shipment record.

6

Configuring Transportation

You can record transportation or in-transit updates for a container. These updates are recorded against activities defined in Selling and Fulfillment Foundation as transportation activities.

6.1 Creating an Activity Code

To create an activity code:

1. From the tree in the application rules side panel, choose Transportation > Activities. The Activity Search window displays.
2. Enter information in the applicable fields. Refer to Table 6–1 for field value descriptions.
3. Choose .

Table 6–1 Activity Search Window

Field	Description
Activity Group	This field is automatically populated by the system as 'Transportation'.
Activity List	
Activity Code	Enter a name for the activity code. This Activity Code is the unique identity of the activity.
Description	Enter a brief description for the activity code.

6.2 Modifying an Activity Code

To modify an activity code:

1. From the tree in the application rules side panel, choose Transportation > Activities. The Activity Search window displays, with the list of activities.
2. Enter information in the applicable fields. Refer to Table 6–1 for field value descriptions.
3. Choose .

Note: It is recommended that you do not modify the list of activity codes provided by the Sterling WMS.

6.3 Deleting an Activity Code

To delete an activity code:

1. From the tree in the application rules side panel, choose Transportation > Activities. The Activity Search window displays, with the list of activities.
2. Choose the Activity Code to be deleted.
3. Choose ✕.

Note: It is recommended that you do not modify the list of activity codes provided by the Sterling WMS.

7

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

7.1 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 .

7.2 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 .

7.3 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 .

8

Configuring a Load Document's Hold Types

You can configure hold types that are applied on a load document. A load can be put on hold either manually or automatically by applying a particular hold type to it.

You can use the Hold Types branch for:

- Creating a Hold Type
- Modifying a Hold Type
- Deleting a Hold Type

8.1 Creating a Hold Type

To create a hold type:

1. From the tree in the application rules side panel, choose Document Specific (Load) > Load > Hold Types. The Hold Types window displays in the work area.
2. Click . The Hold Type pop-up window displays.
3. In Hold Type, enter the hold type.
4. In Hold Type Description, enter the description of the hold.
5. Enter information in the applicable fields. See Table 8–1, Table 8–2, and Table 8–3 for field value descriptions.
6. Click .

Table 8–1 Hold Type Pop-Up Window, Hold Creation Tab

Field	Description
Hold Created Automatically	
On Load Creation	Check this box to apply this hold type to all loads after creating the load.

Table 8–1 Hold Type Pop-Up Window, Hold Creation Tab

Field	Description
On Resolution Of The Hold Type	Check this box to apply a hold type upon resolution of another hold type. From the drop-down list, select this hold type. **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 upon resolution of hold type A, and hold type A as being applied upon 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	Check this box to automatically apply a hold type to a load for certain modification types. Click to modify the list. In the Modification Type List pop-up window: • Use the right arrow to move the available modification types you want to associate with the hold type to the subscribed list. • Use the left arrow to unsubscribe the modification types you want to disassociate with the hold type and move them back under the available list.
For All Loads	Choose this option if you want to apply the above conditions to all loads. **Note**: You can choose this button only after saving the hold that you created.
Only For Loads Satisfying The Following Condition	Choose this option if you want to apply the above conditions to loads satisfying a certain condition. Click to build or modify a condition that is evaluated. For more information about using the condition builder, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*. You can extend the available attributes for a condition. For more information about extending the attributes, see the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* . **Note**: You can choose this button after saving the hold type that you created.

Table 8–1 Hold Type Pop-Up Window, Hold Creation Tab

Field	Description
Hold Created Manually	
By Any User	Choose this option if any user group can apply the hold to a load.
By Users Who Belong To The Following Groups	Choose this option if only users belonging to certain user groups can apply the hold to a load. Click to modify the list. In the subsequent pop-up window: • Use the right arrow to move the available user groups that you want to associate with a hold type to the subscribed list. • Use the left arrow to unsubscribe user groups that you want to disassociate with a hold type and move them back under the available list.

Table 8–2 Hold Type Pop-Up 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 processes created holds.
The Following Time Triggered Transaction Will Process Rejected Holds	From the drop-down list, select the time-triggered transaction that processes rejected holds.

Table 8–2 Hold Type Pop-Up Window, Hold Resolution Tab

Field	Description
Hold Resolved Manually	
Any User Can Process This Hold	Choose this option if any user group can process the hold.
Users Belonging To The Following User Groups Can Process This Hold	Choose this option if only users belonging to certain user groups can process this hold. Click to modify the list. In the subsequent pop-up window: • Use the right arrow to move the available user groups that you want to associate with a hold type to the subscribed list. • Use the left arrow to unsubscribe the user groups that you want to disassociate with a hold type and move them back under the available list.

Table 8–3 Hold Type Pop-Up Window, Hold Effects Tab

Field	Description
The Following Transactions Will Be Stopped From Processing Loads On This Hold	Transactions that are disallowed when a hold type is applied to a load. Click to modify the list. In the subsequent pop-up window: • Use the right arrow to move the available modification types that you want to associate with a hold type to the subscribed list. • Use the left arrow to unsubscribe the modification types that you want to disassociate with a hold type and move them back under the available list.
The Following Modifications Are Not Allowed For Loads On This Hold	Modification types that are disallowed when a hold type is applied to a load. Click to modify the list. In the subsequent pop-up window: • Use the right arrow to move the available transactions that you want to associate with a hold type to the subscribed list. • Use the left arrow to unsubscribe transactions that you want to disassociate with a hold type and move them back under the available list.

8.2 Modifying a Hold Type

You can modify a hold type.

To modify a hold type:

1. From the tree in the application rules side panel, choose Document Specific (Load) > Load > 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.
3. Enter information in the applicable fields. See Table 8–1, Table 8–2 and Table 8–3 for field value descriptions.
4. Click .

8.3 Deleting a Hold Type

You can delete a hold type.

To delete a hold type:

1. From the tree in the application rules side panel, choose Document Specific (Load) > Load > Hold Types. The Hold Types window displays in the work area.
2. Select the applicable hold type and click ✕.

9

Configuring a Load Document's Pipeline

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 the *Sterling Distributed Order Management: Configuration Guide*.

To complete a load document's lifecycle, each document has a set of different processes that it can go through. These processes are called process types.

- Receipt

You can configure the rules and components specific to a load document's process type.

You can use process type configuration for:

- Defining Process Type Details
- Process Type Pipeline Configuration

9.1 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*.

9.2 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 load process 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.

9.2.1 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.

9.2.1.1 Condition Variables for Pipeline Determination

For a list of the condition variables that can be used for pipeline determination, refer to Appendix B, "Condition Builder Attributes".

9.2.2 Pipelines

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

To view the load execution pipeline details:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Load Execution Process Model. The Load Execution window displays.

2. In the Load Execution window, choose Load Execution Repository > Pipelines > Load Execution.
3. The Pipeline Detail: Load Execution (Load Execution) window displays.

For more information about creating and modifying a pipeline, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

9.2.3 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 an 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 a load execution pipeline:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Load Execution Process Model. The Load Execution window displays.
2. In the Load Execution 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 9–1 Load Execution Pipeline - Transactions Tab Window

Field	Description
Change Load Status	This transaction represents any modifications that may be made involving a load's status.
Close Delivery Plan	This transaction represents a delivery plan being closed and ready to be purged from the system.
Close Load	This transaction represents a load being closed and ready to be purged from the system.
Create Delivery Plan	This transaction represents the creation of a delivery plan.
Create Load	This transaction represents a the creation of a load.
Delete Delivery Plan	This transaction represents the deletion of a delivery plan.
Mark Load As Trailer Loaded	This transaction indicates that all the shipments belonging to a load have been loaded onto the appropriate Carrier.
Mark Load Not Loaded To Trailer	This transaction indicates that a load has not been loaded onto the appropriate Carrier.
Modify Delivery Plan	This transaction represents modifications made to a delivery plan.
Modify Load	This transaction represents modifications made to a load.
Purge Delivery Plan	This transaction represents the process of removing delivery plans from the system.
Purge Load	This transaction represents the process of removing loads from the system.
Receive Intransit Updates for Load	This transaction represents the process of receiving any updated concerning the status of a load while it is in transit.
Synchronize Task Queue	This transaction represents the process of synching the load execution task queue.

9.2.4 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 a load execution pipeline:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Load Execution Process Model. The Load Execution window displays.
2. In the Load Execution 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 9–2 Load Execution Pipeline - Statuses Tab Window

Field	Description
Load Created	This indicates that a load has been created.
Trailer Loaded	This indicates that a load has been loaded on to the appropriate Carrier.
Load Intransit	This indicates that a load is physically in between stops configured in the delivery plan.
Load Completed	This indicates that a load has been delivered to the applicable stop or destination as per the delivery plan.

9.2.5 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 a load execution pipeline:

1. From the tree in the application rules side panel, choose Document Specific > *(Document Type)* > Load Execution Process Model. The Load Execution window displays.
2. In the Load Execution 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*.

9.2.6 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)* > Load Execution Process Model. The Load Execution window displays.
2. In the Load Execution 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*.

10

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

10.1 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 .

10.2 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 .

10.3 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 .

11

Configuring a Load Document's Charge Categories

You can define **charge definitions** that you can associate with orders and invoices through charge categories. These categories contain a group of related charge names that can be used when the particular category is used.

Following are the Selling and Fulfillment Foundation default charge definitions:

- Shipping
- Handling
- Personalization
- Discount

> **Note:** Do not use charge definitions to create tax structures.

Use the Charge Categories branch for:

- Creating a Charge Category
- Modifying a Charge Category
- Deleting a Charge Category

11.1 Creating a Charge Category

To create a charge category:

1. From the tree in the application rules side panel, choose Document Specific > Load > Charge Categories. The Charge Categories window displays in the work area.
2. Choose . The Charge Category Details window displays.

3. In Charge Category, enter the name of the charge category.
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 if the category should be used for profit margin calculation.
8. Choose .

> **Note:** Charge categories cannot be localized. For more information about localization, see the *Selling and Fulfillment Foundation: Localization Guide.*

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

11.1.1 Adding a Charge Name Associated with a Charge Category

Charge names are names of the actual charges included in the charge definition.

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.*

11.1.2 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 .

11.1.3 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 .

11.2 Modifying a Charge Category

To modify a charge category:

1. From the tree in the application rules side panel, choose Document Specific > Load > Charge Categories. The Charge Categories window displays in the work area.
2. Select the applicable charge category and choose . The Charge Category Details window displays.
3. In Description, enter a brief description of the charge category.
4. Select Billable if the charge is billable. Non-billable charges are not considered in order totals, but do appear in invoices.
5. Select Discount if the charge you are creating is a discount charge type.
6. Select Consider For Profit Margin if the category should be used for profit margin calculation.
7. Choose .

11.3 Deleting a Charge Category

To delete a charge definition:

1. From the tree in the application rules side panel, choose Document Specific > Load > Charge Categories. The Charge Categories window displays in the work area.
2. Select the applicable charge category and choose .

12

Configuring a Load Document's Purge Criteria

You can set qualifications around each type of purge. A **purge** is 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, default purge rules are provided. These can be modified for your system operations.

Table 12–1 lists the purge rules provided for load document types in Selling and Fulfillment Foundation.

Table 12–1 Load Document Type Purge Rules

Rule	Description	Retention Days
DELIVERYPLANPRG	Purges delivery plan information.	30
LOADPRG	Purges load information.	30

12.1 Modifying a Load Document Type's Purge Criteria Rule

To modify a load document type's purge criteria rule:

1. From the tree in the application rules side panel, choose Document Specific > Load > Purge Criteria. The Purge Criteria window displays in the work area.
2. Select the applicable purge criteria rule and choose . The Purge Criteria Details pop-up window displays.

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

Table 12–2 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 of data 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.

Table 12–2 Purge Criteria Details Pop-up Window

Field	Description
Write to Log File	Select this field if you want purged data written to a log. The log 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` of yfs.properties. If a variable is introduced, then `yfs.purge.path` is ignored. For more information about using variables for the log file directory, refer to the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*. For information about file name limitations relating to internationalization, see the *Selling and Fulfillment Foundation: Localization Guide*.

13

Configuring a Load Document's Load Types

You can define codes for load types that appear on a load document. A load carries one or more shipments from one point to another point.

> **Note:** This code has no application logic associated with it and can be set up as per your business practices.

You can use the Load Type branch for:

- Creating a Load Type
- Modifying a Load Type
- Deleting a Load Type

13.1 Creating a Load Type

To create a load type:

1. From the tree in the application rules side panel, choose Document Specific > Load > Load Type. The Load Type window displays in the work area.
2. Choose . The Load Type Details pop-up window displays.

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

13.2 Modifying a Load Type

To modify a load type:

1. From the tree in the application rules side panel, choose Document Specific > Load > Load Type. The Load Type window displays in the work area.
2. Select the applicable load type and choose . The Load Type Details pop-up window displays.
3. In Short Description, enter a brief description of the load type.
4. In Long Description, enter a more detailed description of the load type.
5. Choose .

13.3 Deleting a Load Type

To delete a load type:

1. From the tree in the application rules side panel, choose Document Specific > Load > Load Type. The Load Type window displays in the work area.
2. Select the applicable load type and choose ✕.

14

Configuring a Shipment Document's Hold Types

You can configure the hold types that are applied to a shipment document. A shipment can be put on hold either manually or automatically by applying a specific hold type on it.

You can use the Hold Types branch for:

- Creating a Hold Type
- Modifying a Hold Type
- Deleting a Hold Type

14.1 Creating a Hold Type

To create a hold type:

1. From the tree in the application rules side panel, choose Document Specific (Shipping) > Sales Order > Hold Types. The Hold Types window displays in the work area.
2. Click . The Hold Type pop-up window displays.
3. In Hold Type, enter the type of the hold.
4. In Hold Type Description, enter the description of the hold.
5. Enter information in the applicable fields. See Table 14–1, Table 14–2, and Table 14–3 for field value descriptions.
6. Click .

Table 14–1 Hold Type Pop-Up Window, Hold Creation Tab

Field	Description
Hold Created Automatically	
On Shipment Creation	Check this box to apply this hold type to all shipments upon shipment creation.

Table 14–1 Hold Type Pop-Up Window, Hold Creation Tab

Field	Description
On Resolution Of The Hold Type	Check this box to apply this hold type upon resolution of another hold type. From the drop-down list, select the hold type that, upon resolution, triggers this hold type. **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 upon resolution of hold type A, and hold type A as being applied upon 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	Check this box for modification types that automatically apply this hold type to a shipment. Click to modify the list. In the Modification Type List pop-up window: • Use the right arrow to move the available modification types that you wish to associate with this hold type to the subscribed list. • 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 Shipments	Choose this option if the above conditions need to be applied to all shipments. **Note**: You can select this option only after the created hold has been saved.
Only For Shipments Satisfying The Following Condition	Choose this option if the above conditions need to be applied to shipments satisfying a certain condition. Click to build or modify the condition that is evaluated. For more information about using the condition builder, refer to the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*. The available attributes for this condition can be extended. For more information, refer to the *Selling and Fulfillment Foundation: Extending the Condition Builder Guide* . **Note**: You can select this option only after the created hold has been saved.

Table 14–1 Hold Type Pop-Up Window, Hold Creation Tab

Field	Description
Hold Created Manually	
By Any User	Choose this option if any user group can apply this hold to a shipment.
By Users Who Belong To The Following Groups	Choose this option if only users belonging to certain user groups may apply this hold to a shipment. Click to modify the list. In the subsequent pop-up window: • Use the right arrow to move the available user groups that you wish to associate with this hold type to the subscribed list. • 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 14–2 Hold Type Pop-Up 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 processes the created holds.
The Following Time Triggered Transaction Will Process Rejected Holds	From the drop-down list, select the time-triggered transaction that processes the rejected holds.

Table 14–2 Hold Type Pop-Up Window, Hold Resolution Tab

Field	Description
Hold Resolved Manually	
Any User Can Process This Hold	Choose this option if any user group can process this hold.
Users Belonging To The Following User Groups Can Process This Hold	Choose this option if only users belonging to certain user groups can process this hold. Click to modify the list. In the subsequent pop-up window: • Use the right arrow to move the available user groups that you wish to associate with this hold type to the subscribed list. • 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 14–3 Hold Type Pop-Up Window, Hold Effects Tab

Field	Description
The Following Transactions Will Be Stopped From Processing Shipments On This Hold	Transactions that are disallowed when this hold type is applied to a shipment. Click to modify the list. In the subsequent pop-up window: • Use the right arrow to move the available modification types that you wish to associate with this hold type to the subscribed list. • 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 Shipments On This Hold	Modification types that are disallowed when this hold type is applied to a shipment. Click to modify the list. In the subsequent pop-up window: • Use the right arrow to move the available transactions that you wish to associate with this hold type to the subscribed list. • Use the left arrow to unsubscribe transactions that you wish to disassociate with this hold type and move them back into the available list.

14.2 Modifying a Hold Type

To modify a hold type:

1. From the tree in the application rules side panel, choose Document Specific (Shipping) > Sales Order > 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.
3. Enter information in the applicable fields. See Table 14–1, Table 14–2 and Table 14–3 for field value descriptions.
4. Click .

14.3 Deleting a Hold Type

To delete a hold type:

1. From the tree in the application rules side panel, choose Document Specific (Shipping) > Sales Order > Hold Types. The Hold Types window displays in the work area.
2. Select the applicable hold type and click ✕.

15

Configuring a Load Document's Stop Types

You can modify codes for stop types that appear on a load document. A stop is a location where a shipment is picked up or dropped off.

> **Note:** This code has no application logic associated with it and can be set up as per your business practices.

Following are the Selling and Fulfillment Foundation default stop types:

- D - Destination
- I - Intermediate
- O - Origin

15.1 Modifying a Stop Type

To modify a stop type:

1. From the tree in the application rules side panel, choose Document Specific > Load > Stop Type. The Stop Type window displays in the work area.
2. Select the applicable stop type and choose . The Stop Type Details pop-up window displays.
3. In Short Description, enter a brief description of the stop type.
4. In Long Description, enter a more detailed description of the stop type.
5. Choose .

16

Configuring a Load Document's Modification Rules

Most load document types flow through a pipeline without requiring any intervention. However, there are times when modifications are required. Selling and Fulfillment Foundation supports the modifications through the Application Console. It is critical for you to decide which modifications are allowed for each modification type, modification level, and status combination.

> **Important:** Contemplate the business and system integration implications before turning on a setting that is disallowed as part of the system defaults.

Modification type indicates the type of modification carried out on the load document type. Selling and Fulfillment Foundation provides ability to perform modifications on specific attributes. An example of a modification type is adding a stop to a load's delivery plan.

Modification level indicates the level at which a particular modification type is carried out. The load document type has a modification level of Load. Modifications are applied to a particular level and a particular processing status.

The following are the default order modification types and their associated modification level:

Table 16–1 Load Document Modification Types

Modification Type	Description	Modification Level
Add Instruction	An instruction can be added to a load document.	Load
Add Shipment	A shipment can be added to a load document.	Load
Add Stop	A stop can be added to a load document.	Load
Add/Remove Additional Date	Additional dates that can be associated with a load document can be added and removed.	Load
Add/Remove Charge	A charge can either be added to or removed from an load document.	Load
Change Instruction	A modification can be made to an instruction associated with a load document. The following instruction fields can be modified when this modification type is allowed: • Instruction Type • Text • URL	Load
Change Other Attributes	A modification can be made to fields that do not have system or user-defined modification types associated with them.	Load
Change Other Relationships	Not used in this version.	Load
Delete Load	A load document can be deleted.	Load
Delete Stop	A stop can be deleted from a load document.	Load

Table 16–1 Load Document Modification Types

Modification Type	Description	Modification Level
Modify Stop	A modification can be made to a stop associated with a load document.	Load
Remove Shipment	A shipment can be removed from a load document.	Load
Resequence Stop	A load document's stops can be reordered.	Load

You can group modifications in the 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.

Table 16–2 Load 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.

Note: Any permissions set up for user groups override configured modification rules. For more information about configuring user group permissions, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

16.1 Changing a Load Document Type's Modification Rules

To change a load document type's modification rules:

1. From the tree in the application rules side panel, choose Document Specific > Load > 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 16–2 for field value descriptions.

16.2 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. You can use the Order Modification Types branch for:

- Creating a Custom Modification Type
- Modifying a Custom Modification Type
- Deleting a Custom Modification Type

16.2.1 Creating a Custom Modification Type

To create a custom modification type:

1. From the tree in the application rules side panel, choose Document Specific (Load) > Load > Load Modification > Load 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 16–3 for field value descriptions.
3. Choose .

Table 16–3 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 at which the modification type can be performed.
Max Allowed Status	Select the maximum status at which the modification type can be performed.

Table 16–3 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 are associated with the modification type. To remove a subscribed attribute, select the attribute you want to remove and choose ⇦.

16.2.2 Modifying a Custom Modification Type

To modify a custom modification type:

1. From the tree in the application rules side panel, choose Document Specific (Load) > Load > Load Modification > Load 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 16–3 for field value descriptions.
4. Choose .

16.2.3 Deleting a Custom Modification Type

To delete a custom modification type:

1. From the tree in the application rules side panel, choose Document Specific (Load) > Load > Load Modification > Load 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 .

16.3 Changing a Load Document Type's Modification Requiring Auditing Rules

To change a load document type's modification requiring auditing rules:

> **Note:** The Modification Requiring Auditing configurations you make will be effective only when the auditing is enabled for the YFS_LOAD entity.

1. From the tree in the application rules side panel, choose Document Specific > Load > Load Modification Requiring Auditing. The Modifications Requiring Auditing List window displays in the work area.
2. Choose . The Modification Type List window displays.

Table 16–4 Modification Type List Window

Field	Description
Modification Types	A list of modification types for which auditing can be enabled. To add a modification type to the modification requiring auditing list, select the modification type you want to add and choose ⇨.
Modifications Requiring Auditing	A list of modification types that require auditing. To remove a modification type from the modification requiring auditing list, select the modification type you want to remove and choose ⇦.

3. Choose 💾.

17

Configuring an Order Document's Shipment Specific Components

To complete an order document's life cycle, each document has a set of different processes that it goes through. These processes are called process types. Each order document has a defined set of process types in Selling and Fulfillment Foundation.

You can configure rules and components specific to an order document's shipment process type.

You can use the process type configuration for:

- Defining Shipping Modification Rules
- Defining Shipping Hold Types
- Defining Shipping Process Type Details
- Defining Shipping Process Model

17.1 Defining Shipping Modification Rules

The shipping modification rules apply to the following document types:

- Sales Order
- Transfer Order
- Return Order
- Purchase Order

For more information about modification rules, see the *Sterling Distributed Order Management: Configuration Guide*.

For more information about defining and changing modification rules, see *Sterling Distributed Order Management: Configuration Guide*.

17.2 Defining Shipping Hold Types

The shipping hold types apply to the following document types:

- Sales Order
- Transfer Order
- Return Order
- Purchase Order

For more information about hold types, see the *Sterling Distributed Order Management: Configuration Guide*.

For more information about configuring and modifying hold types, see Chapter 14, "Configuring a Shipment Document's Hold Types".

17.3 Defining Shipping Process Type Details

The shipping process type details apply to the following document types:

- Sales Order
- Transfer Order
- Return Order
- Purchase Order

For more information about the shipping process type details, see the *Sterling Distributed Order Management: Configuration Guide*.

For more information about defining and modifying the process type details, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

17.4 Defining Shipping Process Model

The shipping process model applies to the following document types:

- Sales Order
- Transfer Order

- Return Order
- Purchase Order

For more information about the shipping process model, see the *Sterling Distributed Order Management: Configuration Guide*.

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

18

Configuring 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
- Defining Shipment Planning

18.1 Defining Logistics

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

You can use the Logistics branch for:

- Defining Freight Terms
- Defining Shipment Planning

18.1.1 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.

Following are the Selling and Fulfillment Foundation default freight terms:

- Collect (COLLECT) - The buyer owns the freight payment responsibility.
- Prepaid (PREPAID) - The seller owns the freight payment responsibility.

- Third Party Collect (TP-COLLECT) - A third party organization is responsible for all or part of the payment processing, but the buyer is still responsible for the actual payment.
- Third Party Prepaid (TP-PREPAID) - A third party organization is responsible for all or part of the payment processing, but the seller is still responsible for the actual payment.

You can use the Freight Terms tab for:

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

18.1.1.1 Creating a Freight Term

To create a freight term:

1. From the tree in the application rules side panel, choose Logistics Management > Freight Terms. The Freight Terms window displays in the work area.
2. Choose . The Freight Terms Details pop-up window displays.
3. Enter information in the applicable fields. Refer to Table 18–1 for field value descriptions.
4. Enter Choose .

Table 18–1 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 ESP (Economic Shipping parameters), which control how items are shipped. In some cases only the Buyer organization has established values for these rules, in other cases, only Enterprise has established values for these rules. If neither is set, then Hub rules are used. In cases where both the Buyer and the Enterprise have set values for these rules, this setting determines whether to apply Buyer's rules before applying the routing rules of the Enterprise. See *Selling and Fulfillment Foundation: Product Concepts Guide* for more information about these shipping concepts.
Charges paid by	

Table 18–1 Freight Terms Details

Field	Description
Buyer	Select if Buyer pays shipping charges. The system considers the freight term as "Collect".
Shipper	Select if Shipper pays shipping charges. The system considers the freight term as "Prepaid".

18.1.1.2 Modifying a Freight Term

To modify a freight term:

1. From the tree in the application rules side panel, choose Logistics Management > Freight Terms. The Freight Terms window displays in the work area.
2. Select the applicable freight term and choose . The Freight Terms Details pop-up window displays.
3. Enter information in the applicable fields. Refer to Table 18–1 for field value descriptions.
4. Choose .

18.1.1.3 Deleting a Freight Term

To delete a freight term:

1. From the tree in the application rules side panel, choose Logistics Management > Freight Terms. The Freight Terms window displays in the work area.
2. Select the applicable freight term and choose .

18.1.2 Defining Shipment Planning

Shipment Planning is 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 Shipment Planning for:

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

To define shipping planning:

1. From the tree in the application rules side panel, choose Logistics > Shipment Planning. The Shipment Planning window displays in the work area.
2. Enter information in the applicable fields. Refer to Table 18–2 for field value descriptions.
3. Choose .

Figure 18–1 Shipment Planning Window

Table 18–2 Shipment Planning Window

Field	Description
Do not mix in a shipment	If any of the following are selected, separate shipments must be created for items that have different values for these attributes. 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. 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 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. When either the weight, volume or delay shipment threshold is met, the shipment is moved to the next stage in shipping.

Table 18–2 Shipment Planning 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. 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
Region Schema For Routing	Select the applicable region schema for routing. Select . The Region Schema Details window displays. For more information about modifying the region schema details, refer to the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Routing Guide	
Not Maintained	Select this to use manual routing. Shipments are managed in the shipment console, and any routing guides are not consulted.

Table 18–2 Shipment Planning Window

Field	Description
Maintained in Selling and Fulfillment Foundation	Select this to use the Routing Guides maintained in Selling and Fulfillment Foundation to determine how shipments should be routed. See Section 18.1.3, "Creating a Routing Guide". In addition to the routing guide maintained here by the enterprise, there may be a routing guide for the buyer organization. For more information about configuring routing guides for buyer organizations, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*. For more information about using both buyer and enterprise routing guides, see Section 18.1.1.1, "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 are not consulted. Examples of external routing systems include using an integrated Transportation Management System (TMS), or implementing a User Exit which consults with the buyer organization.

18.1.3 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 Logistics Management > Logistics > Shipment Planning. The Shipment Planning 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. Choose .

Figure 18–2 Routing Guide Details Window

Table 18–3 Routing Guide Details Window

Field	Descriptions
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.
Supercedes 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 supercedes routing guide "1234". This is for information purposes only.
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	

Table 18–3 Routing Guide Details Window

Field	Descriptions
Freight Terms	Apply this routing guide when this condition is met. Select *is*, *is in*, or *is not in*. Use: • *is* to specify a single Freight Term. • *is in* to specify a group of Freight Terms, one of which must be matched. • *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. **Note:** This field displays when valid item classifications have been set up for Routing Guide.

18.1.4 Modifying a Routing Guide

To modify a routing guide:

1. From the tree in the application rules side panel, choose Logistics Management > Shipment Planning. The Shipment Planning 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 18–3 for field value descriptions.
5. Choose .

18.1.4.1 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. The shipment mode is determined for shipments/loads based on the combination of the carrier and carrier service.

When routing results in a change to the shipment destination, the system re-routes the shipment, 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.). However, the consolidator destination node should be defined.

To create a routing guideline:

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

Figure 18–3 Routing Guide Line Window

3. Select . A Routing Guide Line Details screen displays in the work area.
4. Enter information in the applicable fields. Refer to Table 18–4 for field value descriptions.
5. Choose .

Figure 18–4 Routing Guide Line Details Window

Table 18–4 Routing Guide Line Details

Setting conditions In many of the following fields, you can select is, is in, or is not in, and then specify a value. Use: • *is* to specify that a single value must be matched • *is in* to specify a group of values, one of which must be matched. • *is not in* to specify a group of values. The routing guide line is used if none of these values match. 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**
When shipping from:	
Node	Select the node.
When ship from is not node, select the following attribute(s)	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.
And shipping to:	
Node	Select the node.
Region	Select the region.
When ship to is not node and region, select the following attribute(s)	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.

Table 18–4 Routing Guide Line Details

Consolidator	Select the consolidator name(s)
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 cases.
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 18.1.4.1.1, "Defining Carrier Services".	
Then ship via:	
Priority	Indicates the number to give this rule a relative importance. When a shipment is compared to the routing guide lines, there may be two carrier services that could be used. The 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 location that is close to the buyer.
Contact Specified	Indicates whether the contact details for the carrier is specified.

Table 18–4 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, check this box and select one of the following: Node — Select the node name. Consolidator — Select the consolidator name. Store# — Select the store number. This is only used when performing routing again due to a revised ship to address.

When the conditions set are assessed, the routing guide line that matches 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 guide line A* and *Routing guide line C* match.

18.1.4.1.1 Defining Carrier Services

When routing occurs, the shipment is matched against the routing guide lines. Based on the criteria specified, you can select a carrier service to use. For example, to determine a carrier service, the following conditions are assessed:

- Whether the carrier is capable of shipping all items in the shipment.

- If multiple carriers are determined for the shipment, then the shipping costs are assessed. The carrier with lower shipping costs is being considered.
- If the cost is the same for both the carriers, then the carrier with the lowest numbered priority is being selected.

You can use the Carrier Services panel for:

- Creating a Carrier Service as a Routing Option
- Modifying a Carrier Service as a Routing Option
- Deleting a Carrier Service as a Routing Option

Creating a Carrier Service as a Routing Option

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 18–5 for field value descriptions.
3. Choose .

Table 18–5 Carrier Services

Fields	Description
Priority	Enter a number to give this rule a relative importance. When a shipment is compared to the routing guide lines, there may be two carrier services that could be used. The 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 location.
Consolidation Requirement for Break Bulk Node	Used to specify the minimum weight and volume criteria for consolidation of shipments for the Break Bulk Node.
Minimum Weight	Enter the minimum weight required to consolidate shipments.
Minimum Volume	Enter the minimum volume required to consolidate shipments.
Contact Address	Used to specify the contact address information. Click to change the contact Address.

Modifying a Carrier Service as a Routing Option

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 . The Carrier Services window displays.
2. Enter information in the applicable fields. Refer to Table 18–5 for field value descriptions.
3. Choose .

Deleting a Carrier Service as a Routing Option

To delete 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 . The Carrier Services window displays.
2. Choose .

18.1.4.2 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 information in the applicable fields. Refer to Table 18–4 for field value descriptions.
4. Choose .

18.1.4.3 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 .

18.1.5 Deleting a Routing Guide

To delete a routing guide:

1. From the tree in the application rules side panel, choose Logistics Management > Shipment Planning. The Shipment Planning window displays in the work area.
2. Select the applicable Routing Guide and choose .

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 141 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. • If left blank or the number specified is less than 10000, it defaults to 5000. • 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. Valid Values: CONFIGURATION, TRANSACTION, MASTER. If set to CONFIGURATION, the agent runs for the records associated with tables that have TableType as CONFIGURATION. 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. 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. 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. 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. • YDMBeforeConsolidateToShipment for each release before it begins processing. • 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 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. 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. 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. N to build a full index file. 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. Y to activate the index after building the index file. The default is N.

Table A–48 Create Catalog Index

Parameter	Description
Auto Insert Search Index Trigger	Y or N. Optional. 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. 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. 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. 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. 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: • AUTHORIZATION - Validates the credit card account • 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: • Y - Releases line quantities regardless of release date criteria • 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: • Y - Default value. Inventory needs to be checked. • 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` `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: • 01 - Optimize on date (Default) • 02 - Optimize on ship node priority • 03 - Optimize on number of shipments
OrderFilter	Optional. Determines the types of orders to filter. Possible values are: • A - All orders (Default) • B - Backorders only • N - New orders only
ScheduleAndRelease	Optional. Notify the schedule process to release all releasable line quantities. Valid values are: • Y - Releases successfully scheduled line quantities. • N - Default value. Only schedules line quantities. **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: • Y - Releases line quantities regardless of release date criteria. • 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. Failures can be caused by any of the following: • If the OrderFilter is “B” (Backorders Only) and there are no backordered or unscheduled lines. • If the OrderFilter is “N” (New orders Only) and there are some backordered or unscheduled lines. • 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. Failures can be caused by any of the following: • The result of the YFSCheckOrderBeforeProcessingUE user exit returns as false. • The Order has the HoldFlag attribute set to 'Y'. • The Order has the SaleVoided attribute set to 'Y'. • 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. **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. 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. Valid Values: CONFIGURATION, TRANSACTION, MASTER. 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. 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. 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: • 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. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Default value. Removes qualifying records from the history tables that are listed in Tables Purged. • 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. **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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged, to the corresponding history tables. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Default value. Records are deleted in batches. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Records are deleted in batches. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Records are deleted in batches. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Table Purged to the corresponding history tables. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Default value. Production mode. Deletes records from the regular tables. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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. • Y - Default value. Removes qualifying records from the history tables listed under Tables Purged. • 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. **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. • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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. **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: • Y - Default value. Removes qualifying records from the history tables listed under Tables Purged. • 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. **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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • DRAFTORDERHISTPRG to purge draft order information from the order history tables. • DRAFTORDERNOLINEHISTPRG to purge draft orders without order lines from the order history tables. • DRAFTORDERNOLINEPRG to purge draft orders that have no order lines. • DRAFTORDERPRG to purge draft order information and archive it in the order history tables. 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. 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. **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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Default value. Production mode. Deletes records from the regular tables. • 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. • If left blank or the number specified is less than 10000, it defaults to 10000. • If the number specified is greater than 10000, then that value is used.
Live	Optional. Mode in which to run. Valid values are: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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. Valid Values: CONFIGURATION, TRANSACTION, MASTER. 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. 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. 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. • If left blank or the number specified is less than 10000, it defaults to 10000. • If the number specified is greater than 10000, then that value is used.
Live	Optional. Mode in which to run. Valid values are: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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. Valid Values: CONFIGURATION, TRANSACTION, MASTER. 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. 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. 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Default value. Removes qualifying records from the history tables listed under Tables Purged. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Default value. Removes qualifying records from the history tables listed under Tables Purged. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under to the corresponding history tables. • 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: • Y - Default value. Records are deleted in batches. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under to the corresponding history tables. • 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: • Y - Default value. Records are deleted in batches. • 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. • Y - Default value. Removes qualifying records from the history tables listed under Tables Purged. • 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. 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. • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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. 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: • Y - Default value. Production mode. Deletes records from the regular tables. • 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. Valid Values: CONFIGURATION, TRANSACTION, MASTER. 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. 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. 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: • Y - Default value. Production mode. Deletes records from the regular tables. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • Y - Default value. Moves qualifying records from the regular tables listed under Tables Purged to the corresponding history tables. • 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: • 1 - current inventory • 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:
	`<AgentCriteriaAttribute>`
	`<OverriddenValue>`
	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

Sterling Distributed Order Management: Configuration 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 *Sterling Distributed Order Management: Configuration 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 *Sterling Distributed Order Management: Configuration 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. 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). `2` – Quick Sync (Re-raise event to publish information from the `YFS_INVENTORY_ALERT` table). `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). 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. 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: `<AgentCriteriaAttribute> <OverriddenValue>` 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. 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 *Sterling Distributed Order Management: Configuration 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

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

B.1 Sales Order

B.1.1 Order Fulfillment

Table B–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 B–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 B–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 B–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* . **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.

B.1.2 Order Negotiation

Table B–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 B–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* . **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.

B.1.3 Outbound Shipment

Table B–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 B–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 B–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* . **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.

B.1.4 Sales Order Receipt

The Sales Order Receipt condition builder attributes are identical to the Return Receipt attributes.

B.2 Planned Order

B.2.1 Planned Order Execution

The Planned Order Execution condition builder attributes are identical to the Order Fulfillment attributes.

B.2.2 Planned Order Negotiation

The Planned Order Negotiation condition builder attributes are identical to the Order Negotiation attributes.

B.3 Return Order

B.3.1 Reverse Logistics

Table B–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 B–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 B–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* . **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.

B.3.2 Return Shipment

The Return Shipment condition builder attributes are identical to the Outbound Shipment attributes.

B.3.3 Return Receipt

Table B–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 B–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* . **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.

B.4 Template Order

The Template Order condition builder attributes are identical to the Order Fulfillment attributes.

B.5 Purchase Order

B.5.1 Purchase Order Execution

Table B–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 B–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 B–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* . **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.

B.5.2 Purchase Order Negotiation

Table B–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 B–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* . **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.

B.5.3 Inbound Shipment

The Inbound Shipment condition builder attributes are identical to the Outbound Shipment attributes.

B.5.4 Purchase Order Receipt

The Purchase Order Receipt condition builder attributes are identical to the Return Receipt attributes.

B.6 Transfer Order

B.6.1 Transfer Order Execution

The Transfer Order Execution condition builder attributes are identical to the Order Fulfillment attributes.

B.6.2 Transfer Order Delivery

The Transfer Order Delivery condition builder attributes are identical to the Outbound Shipment attributes.

B.6.3 Transfer Order Receipt

The Transfer Order Receipt condition builder attributes are identical to the Return Receipt attributes.

B.7 Master Order

B.7.1 Master Order Fulfillment

Table B–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 B–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 B–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* . **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.

B.8 Quote

B.8.1 Quote Fulfillment

The Quote Fulfillment condition builder attributes are identical to the Order Fulfillment condition builder attributes.

B.9 Load Execution

Table B–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 B–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* . **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.

B.10 General

Table B–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 B–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* . **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.

B.11 WMS Putaway

The WMS Putaway condition builder attributes are identical to the General attributes.

B.12 WMS Layout Definition

The WMS Layout Definition condition builder attributes are identical to the General attributes.

B.13 WMS Inventory

The WMS Layout Inventory condition builder attributes are identical to the General attributes.

B.14 Trailer Loading

The Trailer Loading condition builder attributes are identical to the General attributes.

B.15 Task Execution

The Task Execution condition builder attributes are identical to the General attributes.

B.16 Move Request Execution

The Move Request Execution condition builder attributes are identical to the General attributes.

B.17 Manifesting

The Manifesting condition builder attributes are identical to the General attributes.

B.18 Over Pack Build

The Over Pack Build condition builder attributes are identical to the General attributes.

B.19 Count Execution

Table B–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 B–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* . **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.

B.20 Pack Process

Table B–12 Pack Process Condition Builder Attributes

Attribute	Description
Node Attributes	
Ship Node	The node that ships this shipment.

Table B–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 B–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 B–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* . **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.

B.21 Outbound Picking

Table B–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* . **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.

B.22 VAS Process

Table B–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 B–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* . **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.

B.23 Opportunity

B.23.1 Opportunity Fulfillment

Table B–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* . **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.

B.24 Item-Based Allocation (IBA) Order

Table B–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 B–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* . **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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