Sterling Commerce
An IBM Company

Product Management Configuration Guide

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Preface

This manual describes how to use the Yantra 7x Configurator for Product Management configuration.

Intended Audience

This manual is intended for use by system administrators and managers who need to configure the Yantra 7x product management rules, items, categories, and so on, in order to define a product catalog and the services associated with the products, that can be used in other applications within Yantra 7x.

Structure

This manual contains the following sections:

Chapter 1, "Introduction"

This chapter briefly describes the contents of this guide.

Chapter 2, "Navigating in the Configurator"

This chapter explains the layout of the Yantra 7x Configurator, actions you can perform throughout the application, and important concepts you should be aware of before using the application.

Chapter 3, "Configuring Catalog Components"

This chapter explains how you can configure the common codes used throughout the product management application.

Chapter 4, "Configuring Products"

This chapter explains how you can configure products in Yantra 7x. A product item is a physical unit that can be ordered, shipped, and returned.

Chapter 5, "Configuring Delivery Services"

This chapter explains how you can configure delivery services. A delivery service is a service item that is used for last mile delivery associations with product items.

Chapter 6, "Configuring Provided Services"

This chapter explains how you can configure provided services. A provided service is any additional action that can be provided in an order that does not represent a physical product item.

Chapter 7, "Configuring Value Added Services"

This chapter explains how you can configure value added services in Yantra 7x.

Appendix A, "Time-Triggered Transaction Reference"

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

Yantra 7x Documentation

For more information about the Yantra® 7x components, see the following manuals in the Yantra® 7x documentation set:

- *Yantra® 7x Release Notes*
- *Yantra® 7x Installation Guide*
- *Yantra® 7x Upgrade Guide*
- *Yantra® 7x Performance Management Guide*
- *Yantra® 7x High Availability Guide*
- *Yantra® 7x System Management Guide*
- *Yantra® 7x Localization Guide*

- *Yantra® 7x Customization Guide*
- *Yantra® 7x Integration Guide*
- *Yantra® 7x Product Concepts*
- *Yantra® 7x Warehouse Management System Concepts Guide*
- *Yantra® 7x Platform Configuration Guide*
- *Yantra® 7x Distributed Order Management Configuration Guide*
- *Yantra® 7x Supply Collaboration Configuration Guide*
- *Yantra® 7x Inventory Synchronization Configuration Guide*
- *Yantra® 7x Product Management Configuration Guide*
- *Yantra® 7x Logistics Management Configuration Guide*
- *Yantra® 7x Reverse Logistics Configuration Guide*
- *Yantra® 7x Warehouse Management System Configuration Guide*
- *Yantra® 7x Platform User Guide*
- *Yantra® 7x Distributed Order Management User Guide*
- *Yantra® 7x Supply Collaboration User Guide*
- *Yantra® 7x Inventory Synchronization User Guide*
- *Yantra® 7x Logistics Management User Guide*
- *Yantra® 7x Reverse Logistics User Guide*
- *Yantra® 7x Warehouse Management System User Guide*
- *Yantra® 7x Mobile Application User Guide*
- *Yantra® 7x Analytics Guide*
- *Yantra® 7x Javadocs*
- *Yantra® 7x Glossary*
- *Yantra® 7x Carrier Server Guide*
- *Yantra® 7x Application Server Installation Guide* (for optional component)

Conventions

The following conventions may be used in this manual:

Convention	Meaning
`...`	An ellipsis represents information that has been omitted.
< >	Angle brackets indicate user-supplied input.
`mono-spaced text`	Mono-spaced text indicates a file name, an API name, or a code example.
/ 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.

1

Introduction

This book concentrates on the rules and setup configurations that make up the Product Management business application in the Yantra 7x Configurator. This book is intended for both Hub and Enterprise administrators using the Yantra 7x Configurator to set up the Yantra 7x environment. Business analysts should also use this book to plan appropriate business practices as they pertain to Yantra 7x. Programmers should refer to the *Yantra 7x Customization Guide* for information about extending Yantra 7x. System Integrators should refer to the *Yantra 7x Integration Guide* for information about extending or integrating external applications with Yantra 7x.

> **Important:** This book assumes that you have read and are familiar with the concepts and business functionality detailed in the *Yantra 7x Product Concepts*.

The Yantra 7x Configurator is a collection of all the rules and setup configurations necessary to implement Yantra 7x organized so that configuration can be done for each business application separately. The following business applications can be configured within in the Yantra 7x Configurator:

- Distributed Order Management

- Inventory Synchronization

- Product Management

- Logistics Management

- Supply Collaboration

- Reverse Logistics

- Platform

1.1 Business Models

There is no single business model that encompasses the environment in which all the Yantra 7x applications can be used. Therefore, there is no single way to configure your Yantra 7x 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 Yantra 7x 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 Yantra 7x. 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.

Yantra 7x provides the engine needed to run the operations of a contract fulfillment provider as well as a centralized system for real-time order execution and event driven problem solving for an entire fulfillment network. It enables fulfillment providers to configure the fulfillment process to meet the needs of their clients.

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

1.1.3 Marketplace

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

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

1.2 Product Management Configuration

Yantra 7x Product Management application enables your organization to control the information and attributes associated with product items, delivery services, and provided services. It offer the capability to integrate product and service data from an unlimited number of internally and externally maintained catalogs. Product Management maintains information on each item including attributes, cross-sells, up-sells, substitutions, and aliases.

You can use the Product Management configuration grouping to configure the following aspects of Yantra 7x for your business application modules:

* Catalog Configurations

- Products
- Delivery Services
- Value Added Services

1.2.1 Catalog Configurations

You can define the common codes used throughout the Product Management application.

For more information about Catalog Configurations, see Chapter 3, "Configuring Catalog Components".

1.2.2 Products

A product item is a physical unit that can be ordered, shipped, and returned. A product item is uniquely defined by its item ID and unit of measure. You can define product item attributes, as well as the catalogs they belong to.

For more information about Products, see Chapter 4, "Configuring Products".

1.2.3 Delivery Services

A delivery service is a service item that is used for last mile delivery associations. Last mile delivery differs from order shipping in that specific product item deliveries are made using a carrier with defined capacity constraints. You can define delivery service item attributes, options, and units of measure.

For more information about Delivery Services, see Chapter 5, "Configuring Delivery Services".

1.2.4 Provided Services

A provided service is any additional action that can be provided in an order that does not represent a physical product item. An installation service for a washing machine product item is an example of a provided service. You can define provided service item attributes, options, and units of measure.

1.2.5 Value Added Services

Value added services are services that customize a product for a buyer, or allow for internal inventory management. For example, a buyer may require that a special label is applied to certain items. This can be done before the item is sent to the customer.

You can define Kitting services, DeKitting services, Inventory Change services, and Compliance services.

For more information about Value Added Services, see Chapter 7, "Configuring Value Added Services".

2

Navigating in the Configurator

This chapter discusses the layout of the Yantra 7x Configurator, actions you can perform throughout the application, and important concepts you should be aware of before using the application.

2.1 Starting the Yantra 7x Configurator

To access the Yantra 7x Configurator:

1. Point your browser to `http://<Yantra 7x installation server>/yantra/console/start.jsp`.

   The browser displays the Sign In window.

2. Enter your login ID and password and choose the Sign In button. The Yantra 7x Application Consoles Home Page is displayed.

3. From the menu bar, choose Configuration > Launch Configurator. The Yantra 7x Configurator opens in a new window.

> **Note:** Additionally, enterprise users who maintain an enterprise can access the Yantra 7x Configurator by means of `http://<Yantra 7x installation server>/yantra/console/login.jsp`.

> **Note:** If both the Yantra 7x Configurator and the Yantra 7x System Management are opened at the same time, and if a dialogue window is opened in either application, the other will stop responding to user input until that dialogue window is closed. This is due to a bug in the Java platform.

2.2 The Yantra 7x Configurator Layout

The Yantra 7x Configurator is a graphical user interface that can be used to configure different aspects of Yantra 7x. 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

Applications Menu

Each application focuses on a particular aspect of Yantra 7x and contains all of the rules, common codes, and settings necessary for Yantra 7x to work in a real-world business setting.

The following applications can be configured in this version of Yantra 7x:

- Distributed Order Management

- Inventory Synchronization

- Product Management

- Logistics Management

- Supply Collaboration

- Reverse Logistics

- Warehouse Management

- 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

Menu Bar

Application
Rules
Side Panel

Work Area
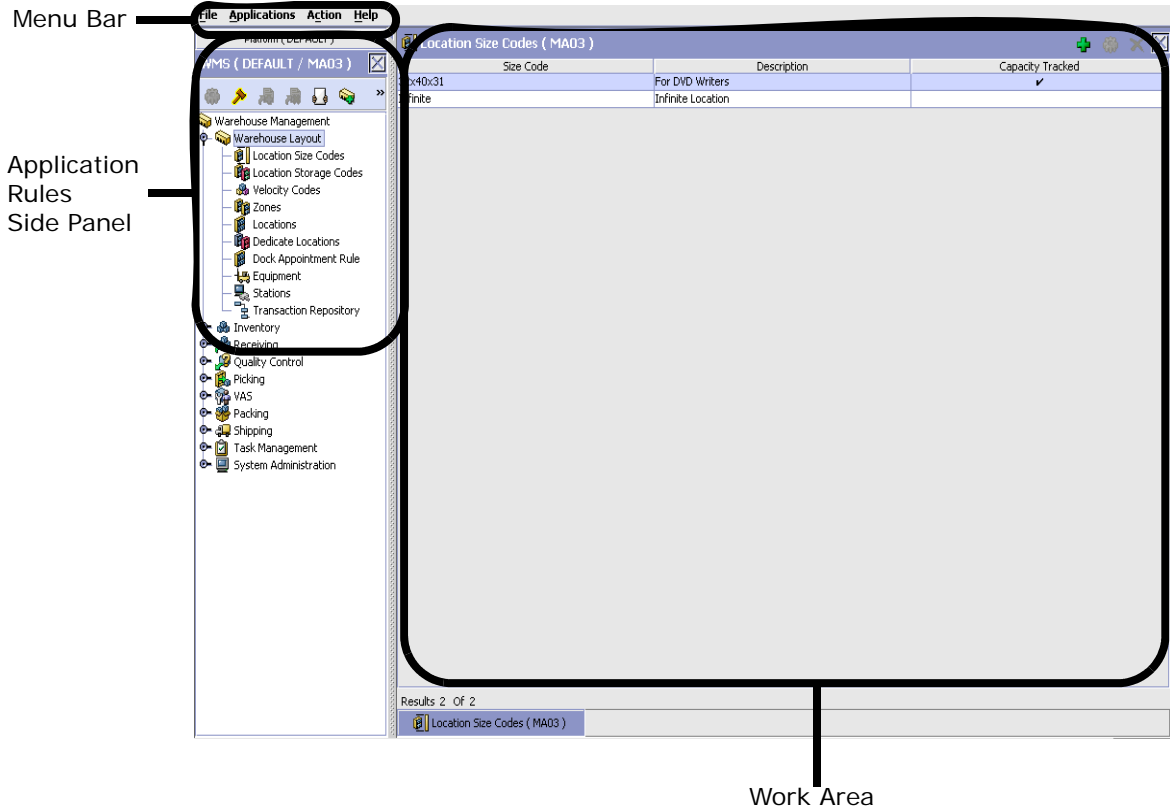
2.2.1 Application Rules Side Panel

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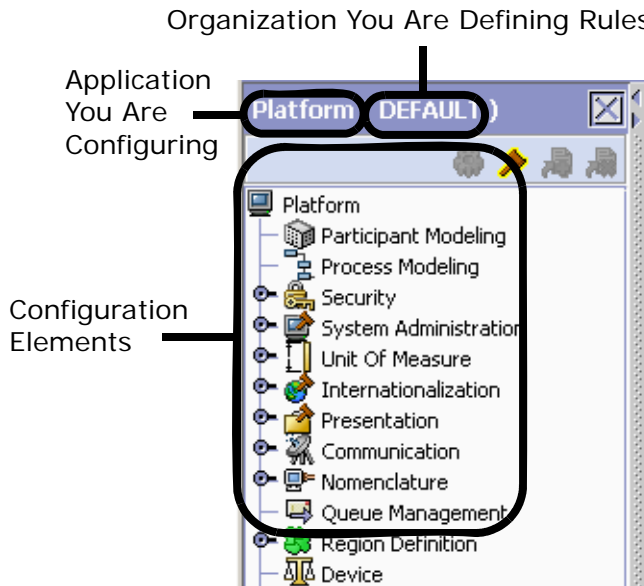
The application rules side panel also identifies the organization you are configuring rules for and what, if any, rules are inherited from another organization.

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 is then displayed in the work area.

2.2.1.2 Determining Inheritance

In Yantra 7x, 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" on page 17.

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 Yantra 7x 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

- Organization - Configuration groups that are associated with any organization within the Hub environment.

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. When an Enterprise is created, it inherits Enterprise level rules from its primary Enterprise.
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.
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
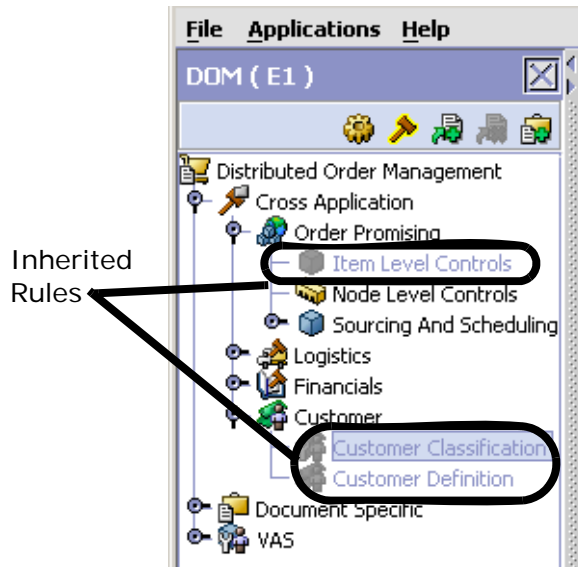
As stated in the table above, depending on the organization you are logged in as, you may be able to override some inherited rules. If a rule can be overridden, the Override Configuration icon becomes available in the application rule side panel when you highlight the rule.

Figure 2–5 Override Configuration Icon

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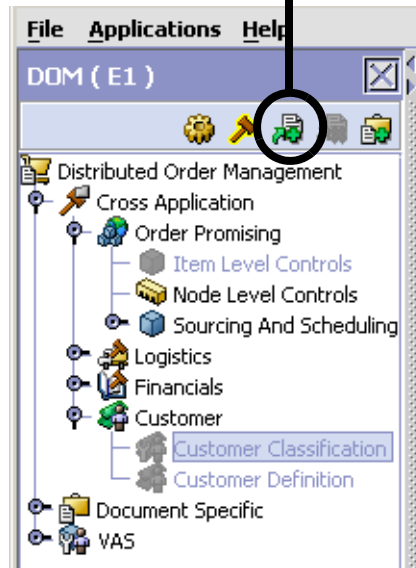
When you choose to override a rule you also override any other rules in the configuration group the rule you are overriding is associated with. When you choose the Override Configuration icon the Configuration Override Details pop-up window is displayed. This window provides the list of rules that will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

Figure 2–6   Example of Configuration Override Details Pop-Up Window
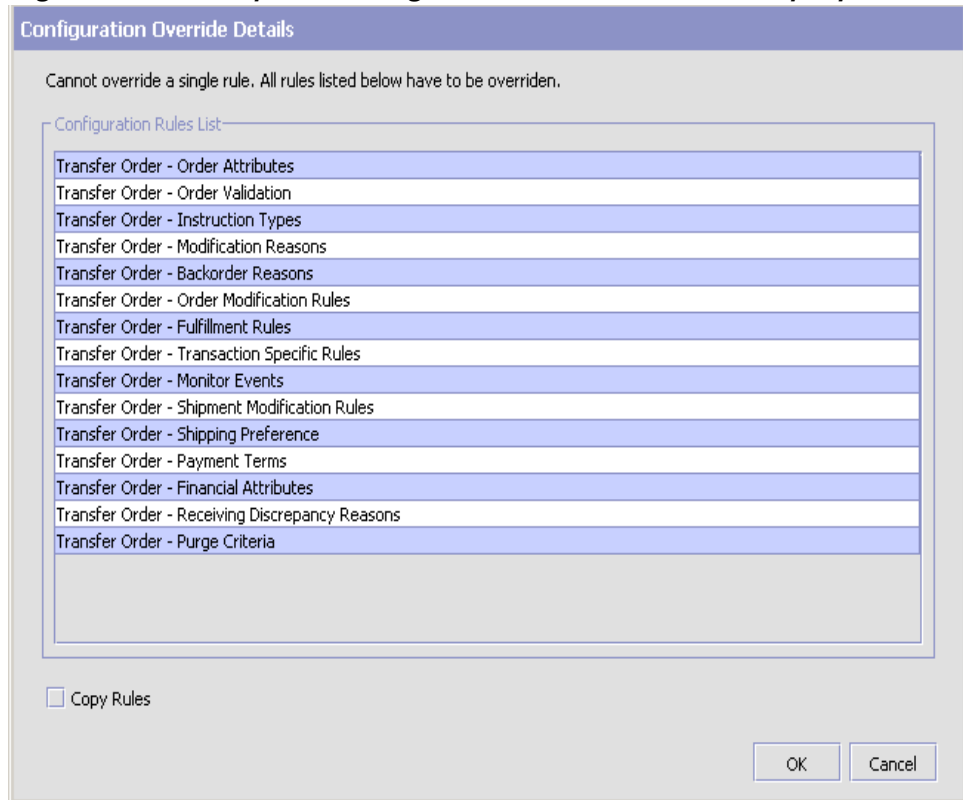
If you override a configuration group and then decide to "re-inherit" the original rules, you can choose the Give Back Configuration Ownership icon. This icon becomes available in the application rules side panel for rules that have been overridden.

Figure 2–7   Give Back Configuration Ownership Icon

Give Back Configuration Ownership Icon is Available
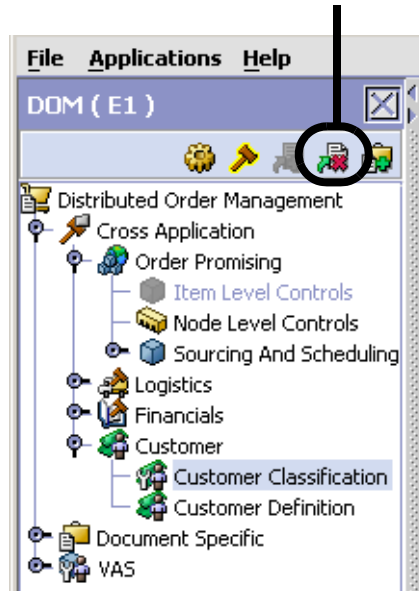
When you select the Give Back Configuration Ownership Icon, the Configuration Override Details pop-up window is displayed. This window provides the list of rules that will be re-inherited.

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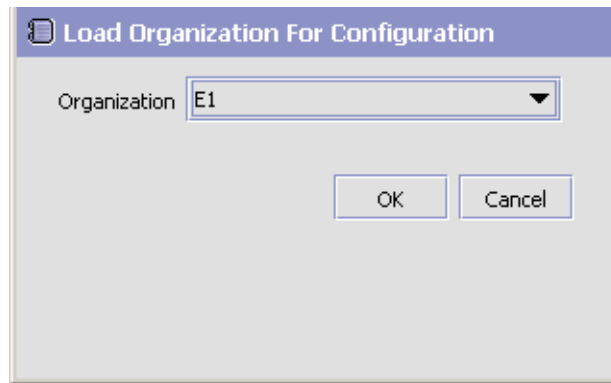
2. From Organization, select the organization that you want to work with.
3. Choose OK. The organization's rules are displayed in the application rules side panel.

> **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 will come across:

- 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.
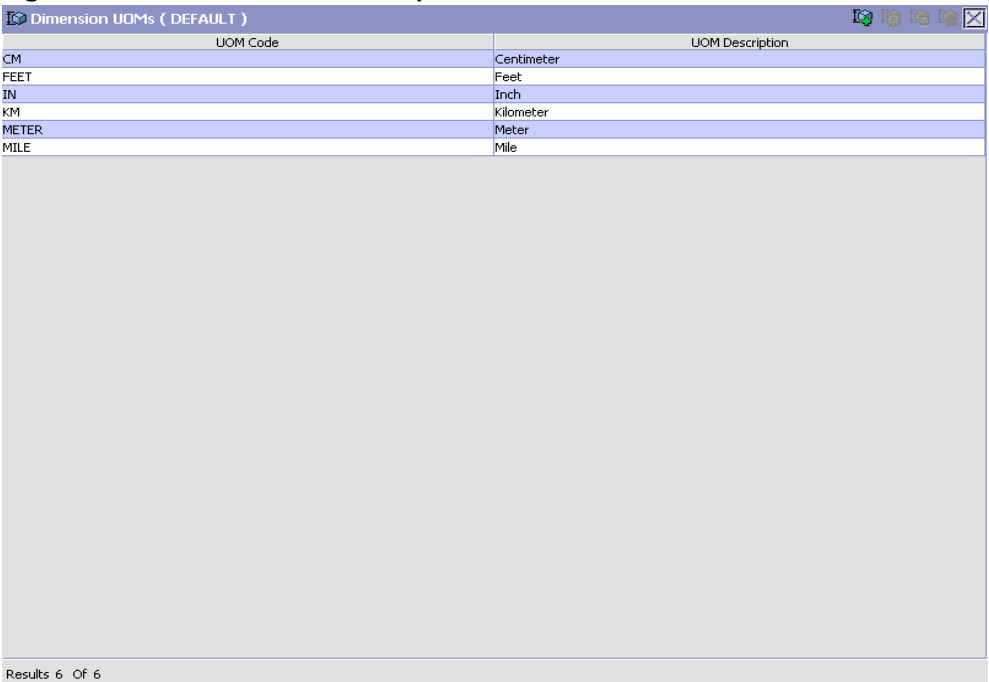
Figure 2–8 Search Window Example

Search
Criteria
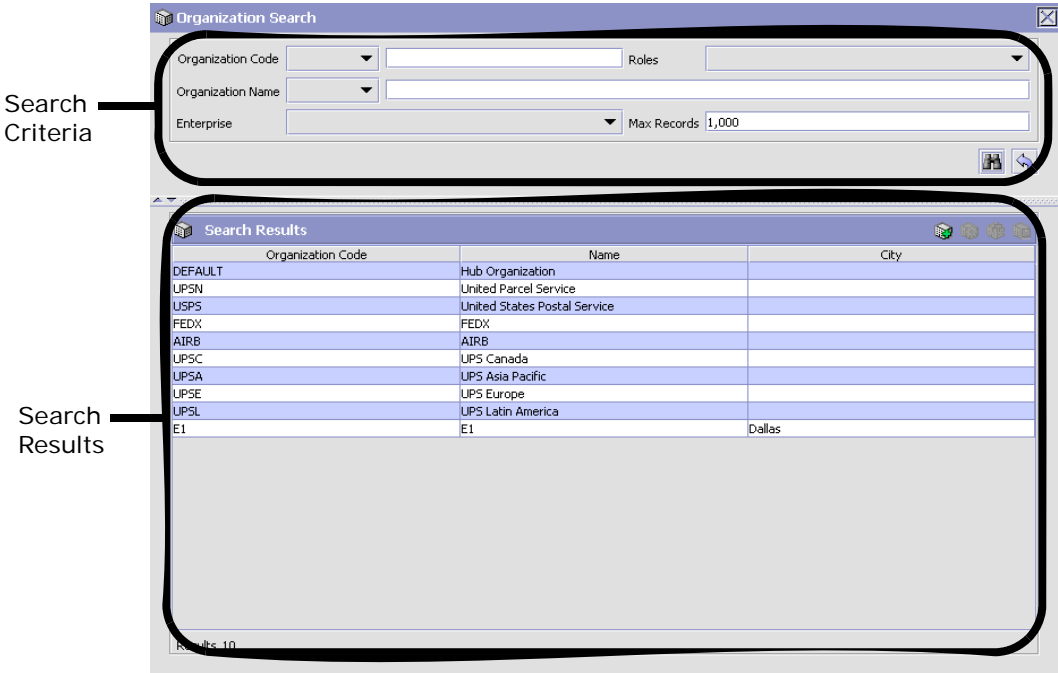
Search
Results

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

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

Dimension UOMs (DEFAULT)

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

Tabs

Editable
Fields

Table

Additional
Actions
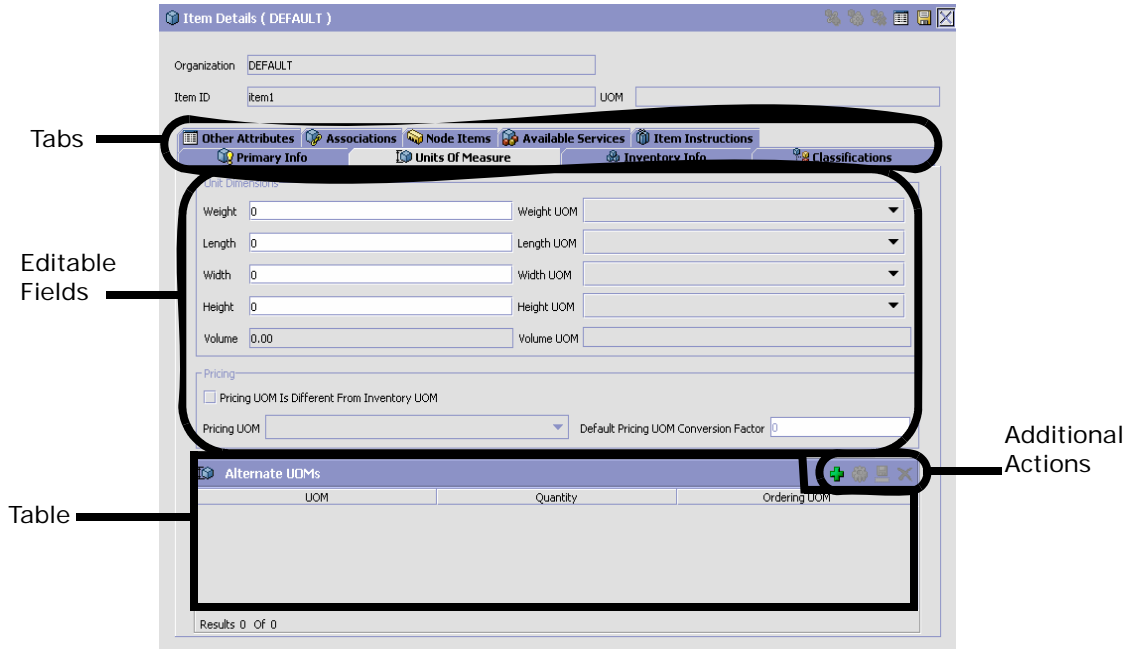
2.2.2.4 Drag and Drop Window

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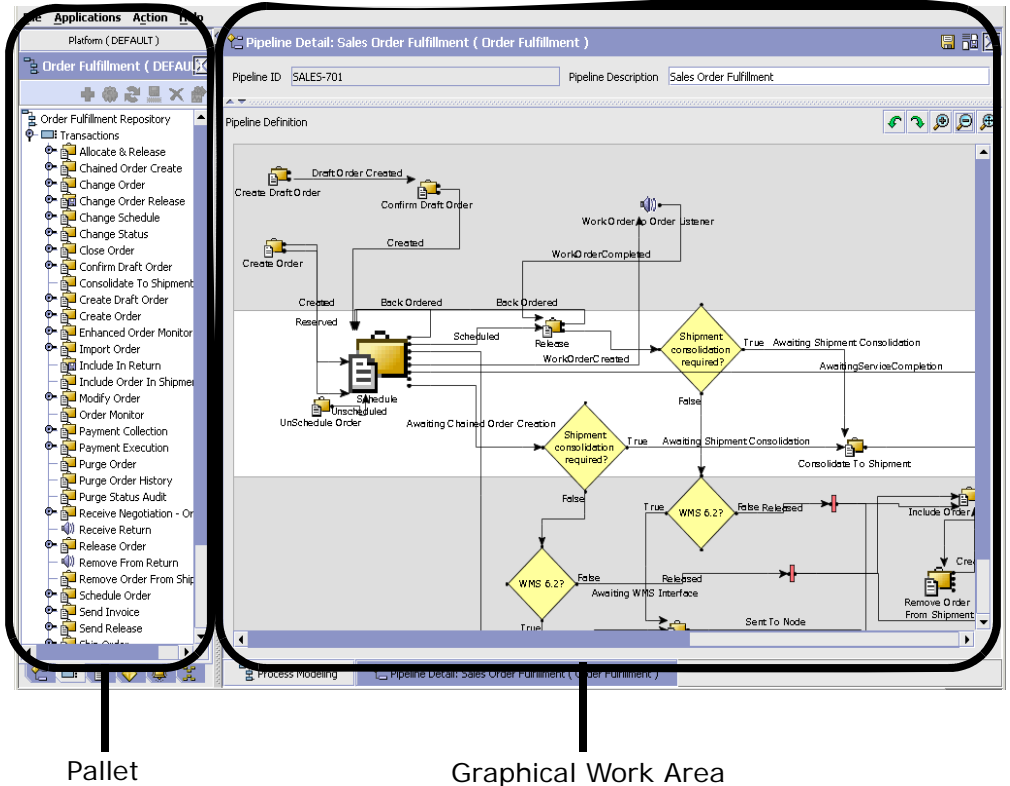
To begin building any of these entities, choose a component, such as a transaction, from the pallet. Drag the component into the graphical work area. The transaction is now displayed as a graphical representation of itself.

Many components have one or more branches. To connect the next component to the originating component, you must drag the graphical component until it forms a connecting line with one of the other component's sides, links can be set up horizontally or vertically. To delete any components or links, right-click 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 hold CTRL while dragging a component, the component is copied within the graphical work area.

2.3 Actions Available Throughout the Yantra 7x Configurator

The following actions can be performed throughout the Yantra 7x Configurator:

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

2.3.1 Using Configurator's Lookup Functionality

Throughout the Yantra 7x Configurator 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 appears in a pop-up screen for you to modify.

Figure 2–12   Lookup Icon Example

The information that is displayed 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 is displayed 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, and Purchase Order are all examples of document types.
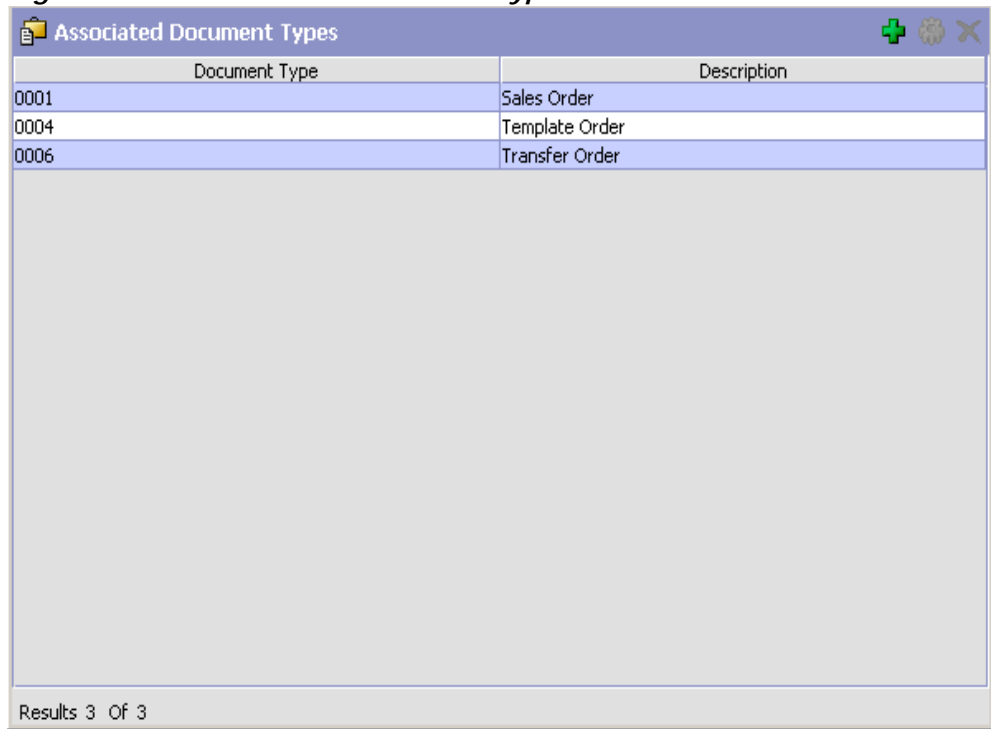
To view an application's associated document types, open the applicable application from the menu and choose ⧉ from the application rules side panel. The Associated Document Types window appears displaying a list of all of the document types associated with the application you are working in.

Figure 2−13 Associated Document Types Window

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 appears.
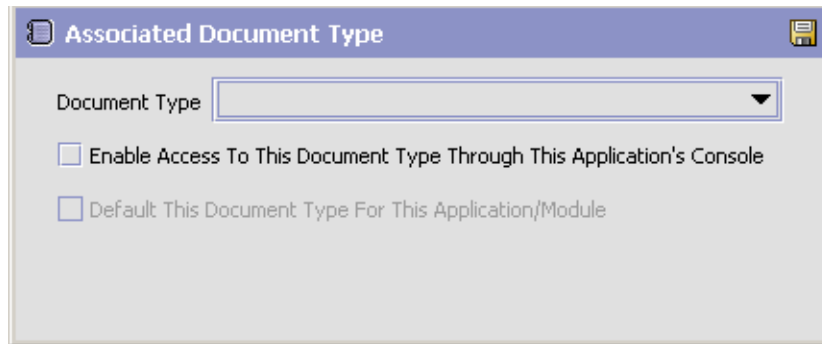
2. From Document Type, select the document type that you want to associate with the application.

3. Select Enable Access To This Document Through This Applications 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 you perform a search in the Configurator, a list of entities is returned in a search results list based on the criteria you searched on. You can filter and arrange any information that appears in a list by right-clicking anywhere on the list's column headings and using the Table Filter Editor associated with the list.

Figure 2–14   Table List Editor Window Example
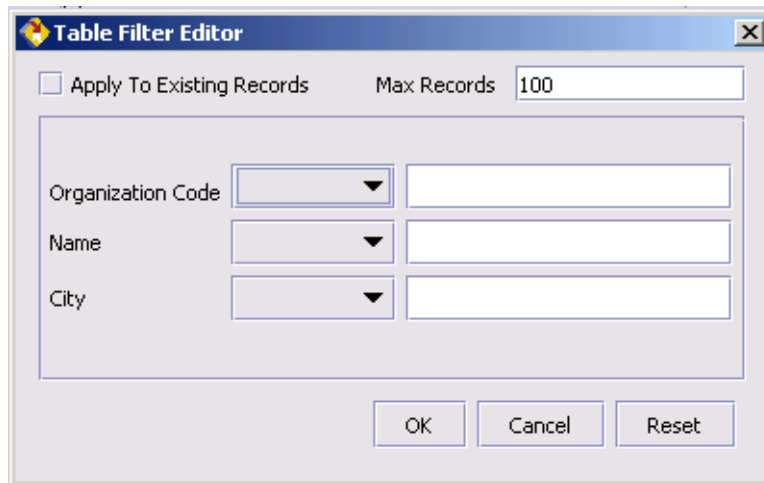
> **Important:**   When you perform a search, only 100 records
> are listed by default. Use the list's Table Filter Editor to
> increase the maximum amount of records returned by a
> search.

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 2–15   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 2–16   Time Field example

Shift Name	Start Time	End Time

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

2.3.6 Using On-Line Help

You can access the Yantra 7x On-Line Help through Help > Online Help.

2.3.7 Troubleshooting Errors

You can view the description and cause of any error raised in Yantra 7x, as well as actions to take to troubleshoot it.

To view Yantra 7x system error descriptions:

1. From the menu bar, choose Help > Troubleshooting. The Error Search window appears.

2. Enter the applicable search criteria and choose 🔍. A list of error codes and their descriptions are displayed.

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

2.3.8 Using Special Characters

Throughout the Yantra 7x Configurator there may be instances where you need to use special characters in data entry. For information regarding the use of special characters in Yantra 7x, see the *Yantra 7x Customization Guide*.

3

Configuring Catalog Components

You can define the common codes used throughout the Product Management application.

You can use the Catalog Configurations branch for:

- Defining Item Statuses
- Defining Additional Attributes
- Defining Item Instruction Codes
- Defining Item Instruction Types
- Defining Service Skills
- Defining Service Complexity Levels

3.1 Defining Item Statuses

You can define common codes for item statuses used when setting up an item.

The following are Yantra 7x default item statuses:

- 2000 - Held (Any item in this status will not be available for some operations within Yantra 7x. For example, an item in this status will not appear within item search screens in the Order Console.)
- 3000 - Published

You can use the Item Statuses branch for:
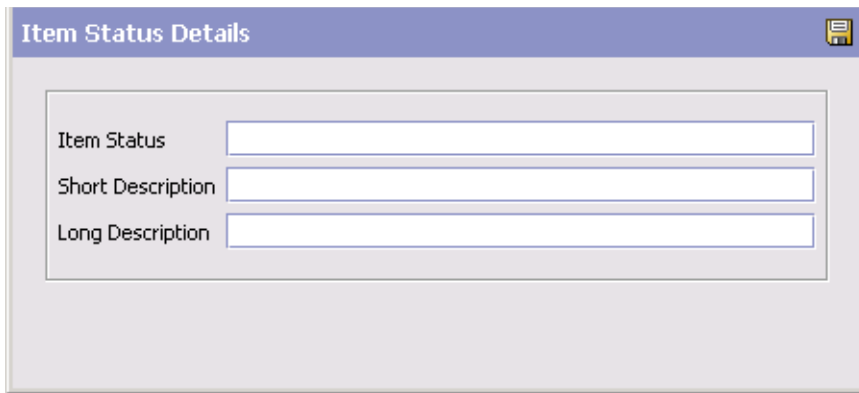
- Creating an Item Status
- Modifying an Item Status

- Deleting an Item Status

3.1.1 Creating an Item Status

To create an item status:

1. From the tree in the application rules side panel, choose Catalog Configurations > Item Statuses. The Item Statuses window appears in the work area.

2. Choose ![icon]. The Item Status Details pop-up window is displayed.

Item Status Details	![save icon]
Item Status	
Short Description	
Long Description	

3. In Item Status, enter the value you want to use for the item status.

4. In Short Description, enter a brief description of the item status.

5. In Long Description, enter a more detailed description of the item status.

6. Choose ![save icon].

3.1.2 Modifying an Item Status

To modify an item status:

1. From the tree in the application rules side panel, choose Catalog Configurations > Item Statuses. The Item Statuses window appears in the work area.

2. Select the applicable item status and choose ![icon]. The Item Status Details pop-up window is displayed.

3. In Short Description, enter a brief description of the item status.

4. In Long Description, enter a more detailed description of the item status.

5. Choose 🖫.

3.1.3 Deleting an Item Status

To delete an item status:

1. From the tree in the application rules side panel, choose Catalog Configurations > Item Statuses. The Item Statuses window appears in the work area.

2. Select the applicable item status and choose 📑.

> **Note:** You cannot delete the default item statuses provided by Yantra.

3.2 Defining Additional Attributes

You can define common codes for additional attributes used when setting up an item. This allows you to store any additional information about your items that is not captured by the defaults in Yantra 7x. These attributes appear as fields in the item details screen.

The following is Yantra 7x default additional attribute:

- REFERENCE

You can use the Additional Attributes branch for:
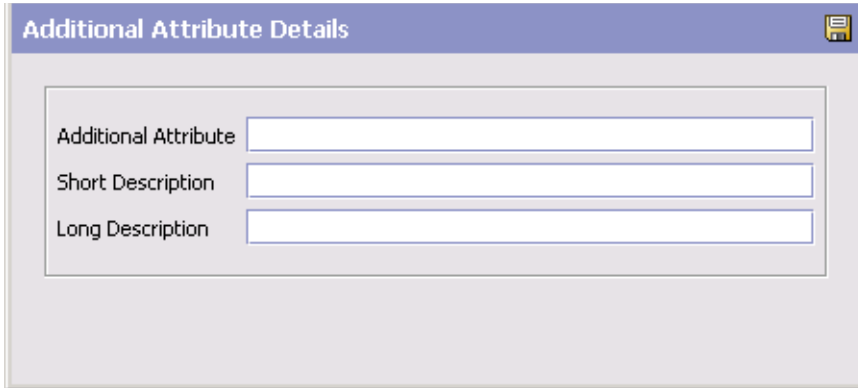
- Creating an Additional Attribute

- Modifying an Additional Attribute

- Deleting an Additional Attribute

3.2.1 Creating an Additional Attribute

To create an additional attribute:

1. From the tree in the application rules side panel, choose Catalog Configurations > Additional Attributes. The Item Additional Attributes window appears in the work area.

2. Choose 🖼️. The Additional Attribute Details pop-up window is displayed.

Additional Attribute Details   💾

Additional Attribute [   ]
Short Description   [   ]
Long Description   [   ]

3. In Additional Attribute, enter the value you want to use for the additional attribute.

> **Important:** Do not put a space or special characters in the Additional Attribute.

4. In Short Description, enter a brief description of the additional attribute.

5. In Long Description, enter a more detailed description of the additional attribute.

6. Choose 💾.

3.2.2 Modifying an Additional Attribute

To modify an additional attribute:

1. From the tree in the application rules side panel, choose Catalog Configurations > Additional Attributes. The Item Additional Attributes window appears in the work area.

2. Select the applicable additional attribute and choose 🖼️. The Additional Attribute Details pop-up window is displayed.

3. In Short Description, enter a brief description of the additional attribute.

4. In Long Description, enter a more detailed description of the additional attribute.

5. Choose 💾.

3.2.3 Deleting an Additional Attribute

To delete an additional attribute:

1. From the tree in the application rules side panel, choose Catalog Configurations > Additional Attributes. The Item Additional Attributes window appears in the work area.

2. Select the applicable additional attribute and choose 📇.

> **Note:** You cannot delete default additional attributes.

3.3 Defining Item Instruction Codes

You can define codes that describe any special instructions that may be associated with an item. For example, you may want to create a Handle With Care item instruction code to associate with all of your fragile items.
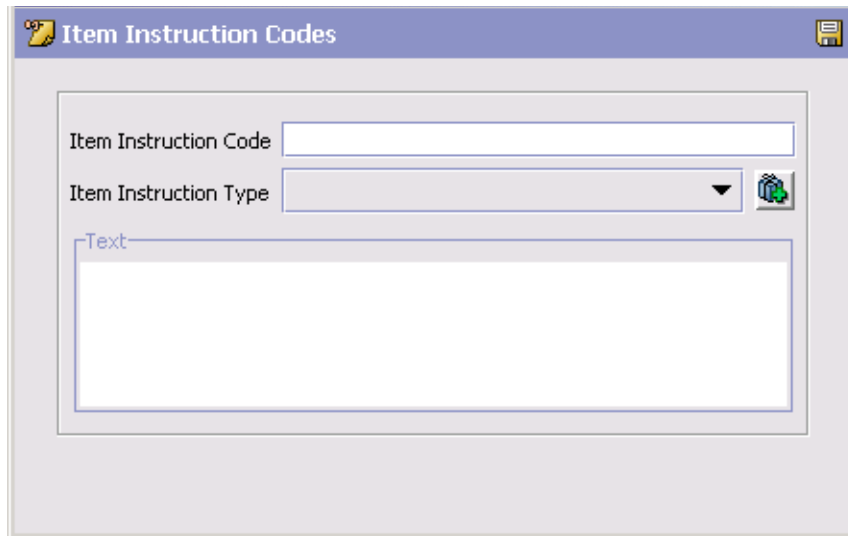
You can use the Item Instruction Codes branch for:

- Creating an Item Instruction Code

- Modifying an Item Instruction Code

- Deleting an Item Instruction Code

3.3.1 Creating an Item Instruction Code

To create an item instruction code:

1. From the tree in the application rules side panel, choose Catalog Configurations > Item Instruction Codes. The Item Instruction Codes window appears in the work area.

2. Choose ➕. The Item Instruction Codes pop-up window is displayed.

3. In Item Instruction Code, enter the name of the item instruction code.

4. From Item Instruction Type, select the instruction type that defines the kind of item instruction you are configuring. For example, Handling or Picking. For more information about configuring item instruction types, see Section 3.4, "Defining Item Instruction Types" on page 37.

5. In Text, enter any special instructions needed to further explain the item instruction code.

6. Choose 🖬.

3.3.2 Modifying an Item Instruction Code

To modify an item instruction code:

1. From the tree in the application rules side panel, choose Catalog Configurations > Item Instruction Codes. The Item Instruction Codes window appears in the work area.

2. Select the applicable item instruction code and choose 🌼. The Item Instruction Codes pop-up window is displayed.

3. From Item Instruction Type, select the instruction type that defines the kind of item instruction you are configuring. For example, Handling or Picking. For more information about configuring item instruction types, see Section 3.4, "Defining Item Instruction Types" on page 37.

4. In Text, enter any special instructions needed to further explain the item instruction code.

5. Choose 🖫.

3.3.3 Deleting an Item Instruction Code

To delete an item instruction code:

1. From the tree in the application rules side panel, choose Catalog Configurations > Item Instruction Codes. The Item Instruction Codes window appears in the work area.

2. Select the applicable item instruction code and choose ✖.

3.4 Defining Item Instruction Types

You can define common codes that can be associated with an item instruction code to further describe what kind of instruction it is. For example, you can create a Pick instruction type and a Handling instruction type. The Pick instruction type can be associated with all item instruction codes that pertain to the item picking process and the Handling instruction type can be associated with all item instruction codes relevant to the handling of items. For more information about configuring item instruction codes, see Section 3.3, "Defining Item Instruction Codes" on page 35.
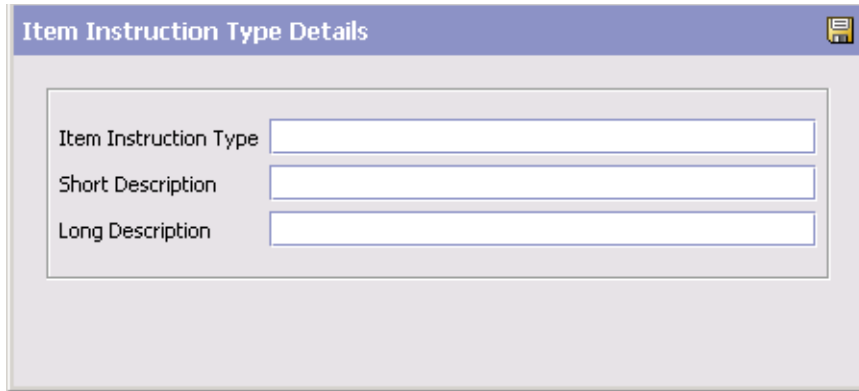
You can use the Item Instruction Types branch for:

- Creating an Item Instruction Type

- Modifying an Item Instruction Type

- Deleting an Item Instruction Type

3.4.1 Creating an Item Instruction Type

To create an item instruction type:

1. From the tree in the application rules side panel, choose Catalog Configurations > Item Instruction Types. The Item Instruction Types window appears in the work area.

2. Choose . The Item Instruction Type Details pop-up window is displayed.

3. In Item Instruction Type, enter the value you want to use for the item instruction type.

4. In Short Description, enter a brief description of the item instruction type.

5. In Long Description, enter a more detailed description of the item instruction type.

6. Choose .

3.4.2 Modifying an Item Instruction Type

To modify an item instruction type:

1. From the tree in the application rules side panel, choose Catalog Configurations > Item Instruction Types. The Item Instruction Types window appears in the work area.

2. Select the applicable item type and choose . The Item Instruction Type Details pop-up window is displayed.

3. In Short Description, enter a brief description of the item instruction type.

4. In Long Description, enter a more detailed description of the item instruction type.

5. Choose 🖫.

3.4.3 Deleting an Item Instruction Type

To delete an item instruction type:

1. From the tree in the application rules side panel, choose Catalog Configurations > Item Instruction Types. The Item Instruction Types window appears in the work area.

2. Select the applicable item type and choose 🗑.

3.5 Defining Service Skills

You can define services skills when setting up provided service items and delivery service items. You can also associate service skills to a service association for an item.

You can use the Service Skills branch for:

- Creating a Service Skill

- Modifying a Service Skill

- Deleting a Service Skill

3.5.1 Creating a Service Skill
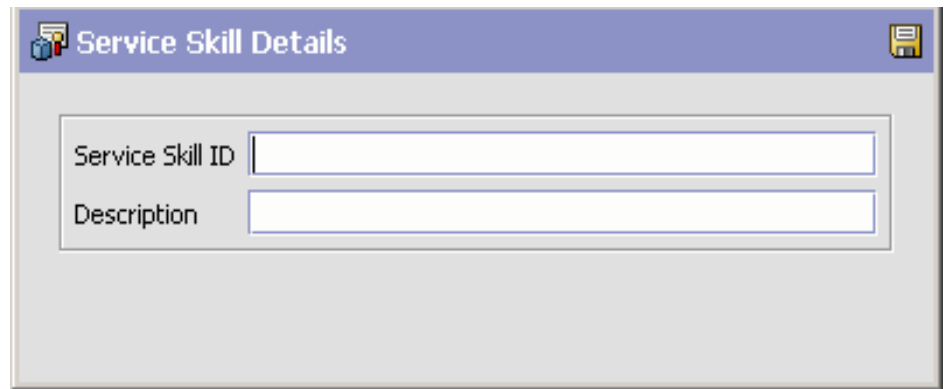
To create a service skill:

1. From the menu bar, choose Applications > Product Management. The Product Management tree is displayed in the side panel.

2. From the Product Management tree, choose Catalog Configurations > Service Skills. The Service Skills window appears in the work area.

Service Skills (DEFAULT)	🔌	
Service Skill ID	Description	
Electrical	Electrical	
Plumbing	Plumbing	

3. Choose ➕. The Service Skill Details pop-up window is displayed.

4. In Service Skill ID, enter the value you want to use for the Service Skill.

5. In Description, enter a description of the service skill.

6. Choose 💾.

3.5.2 Modifying a Service Skill

To modify a service skill:

1. From the menu bar, choose Applications > Product Management. The Product Management tree is displayed in the side panel.

2. From the Product Management tree, choose Catalog Configurations > Service Skills. The Service Skills window appears in the work area.

3. Select the applicable service skill and choose 🎇. The Service Skill Details pop-up window is displayed.

4. In Description, enter a description of the service skill.

5. Choose 💾.

3.5.3 Deleting a Service Skill

To delete a service skill:

1. From the menu bar, choose Applications > Product Management. The Product Management tree is displayed in the side panel.

2. From the Product Management tree, choose Catalog Configurations > Service Skills. The Service Skills window appears in the work area.

3. Select the applicable service skill and choose ✖.

3.6 Defining Service Complexity Levels

You can define services complexity levels when setting up provided service items and delivery service items. You can also assign service copmlexity levels to a service type for an item, which in turn is used to calculate the service complexity level on the work order. Refer to Section 5.4.1, "Defining Delivery Service Types" or Section 6.4, "Defining Provided Service Types" for more information.
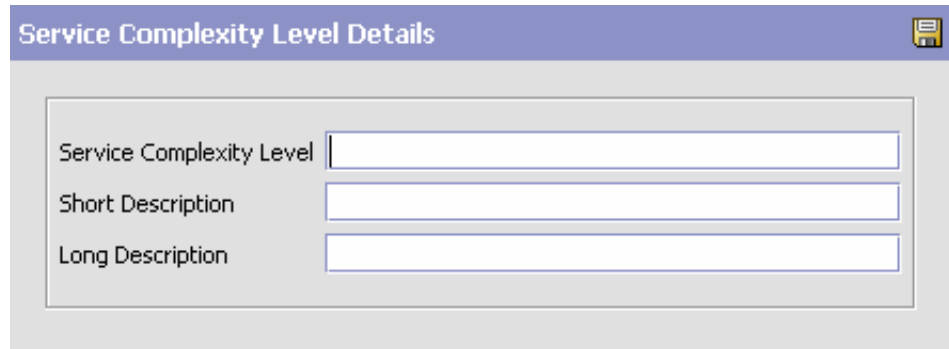
You can use the Service Complexity Levels branch for:

- Creating a Service Complexity Level

- Modifying a Service Complexity Level

- Deleting a Service Complexity Level

3.6.1 Creating a Service Complexity Level

To create a service complexity level:

1. From the menu bar, choose Applications > Product Management. The Product Management tree is displayed in the side panel.

2. From the Product Management tree, choose Catalog Configurations > Service Complexity Levels. The Service Complexity Level window appears in the work area.

3. Choose ➕. The Service Complexity Level Details pop-up window is displayed.

Table 3–1   Service Complexity Level Details Pop-up Window

Field	Description
Service Complexity Level	Enter a name for the service complexity level.
Short Description	Enter a short description of the service complexity level.
Long Description	Enter a long description of the service complexity level.

4. Enter information in the applicable fields. Refer to Table 3–1 for more information.

5. Choose 🖫.

3.6.2 Modifying a Service Complexity Level

To modify a service complexity level:

1. From the menu bar, choose Applications > Product Management. The Product Management tree is displayed in the side panel.

2. From the Product Management tree, choose Catalog Configurations > Service Complexity Levels. The Service Level window appears in the work area.

3. Select the applicable service complexity level and choose 🕸. The Service Complexity Level Details pop-up window is displayed.

   4. Edit information in the applicable fields. Refer to Table 3–1 for more information.

   5. Choose 💾.

3.6.3 Deleting a Service Complexity Level

To delete a service complexity level:

   1. From the menu bar, choose Applications > Product Management. The Product Management tree is displayed in the side panel.

   2. From the Product Management tree, choose Catalog Configurations > Service Complexity Levels. The Service Levels window appears in the work area.

   3. Select the applicable service complexity level and choose ✖.

4

Configuring Products

A product item is a physical unit that can be ordered, shipped, and returned. A product item is uniquely defined by its item ID and unit of measure. You can configure items, units of measure, master catalogs, categories, classifications, and additional item attributes. For more information about configuring product item inventory rules, see the *Yantra 7x Inventory Synchronization Configuration Guide*. For more information about configuring product item sourcing rules, see the *Yantra 7x Distributed Order Management Configuration Guide*.

You can use the Products branch for:

- Defining Product Items

- Defining Item Attribute Overrides at the Node Level

- Defining Master Units of Measure

- Defining Master Catalogs

- Defining Categories

- Defining Classifications

- Defining Item Attributes

4.1 Defining Product Items

Items is used to create product items that can be used in Yantra 7x, as well as defining their unique attributes.

You can use the Items branch for:
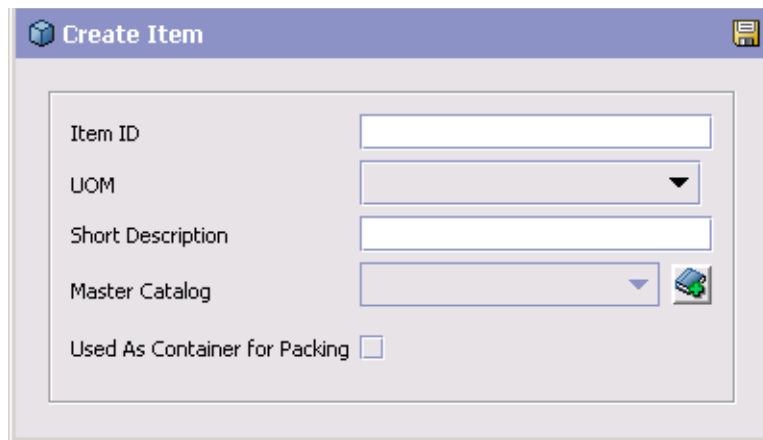
- Creating a Product Item

- Modifying a Product Item

- Deleting an Item
- Recomputing an Item's Computed Unit Cost
- Using the Condition Builder

4.1.1 Creating a Product Item

To create an item:

1. From the tree in the application rules side panel, choose Products > Items. The Product Item Search window appears in the work area.

2. Choose ⬢. The Create Item pop-up window appears.

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

4. Choose 🖫.

Table 4–1   Create Item Pop-Up Window

Field	Description
Item ID	Enter the item ID.
UOM	Select the quantity unit of measure you want to associate with the item.
	Note: The unit of measure makes the item ID unique. For example, if you sell the same item with the same item ID from a node in the United States and a node in Canada, and the United States uses pounds for the unit of measure and Canada uses kilograms, the two different units of measure associated with the item ID makes two unique items in the system.
Short Description	Enter a brief description of the item.
Master Catalog	Select the master catalog you want this item to be part of. A master catalog is the exhaustive list of an organization's items. For more information about configuring master catalogs, see Section 4.4, "Defining Master Catalogs" on page 105.
Used as a Container for Packing	Select to indicate this Item is a container. See Section 4.1.2.13, "Defining a Product Item's Container Attributes" on page 83.

> **Note:**   No Graphical User Interface is provided for creating or modifying Hazmat data.

4.1.2 Modifying a Product Item

To modify an item:

1. From the menu bar, choose Applications > Yantra 7x Product Management > Items. The Item Search window is displayed.

2. Enter applicable search criteria and choose 🔍. The Item List is displayed.

3. Select the applicable item and choose ⚙. The Item Details window is displayed.

Use the Item Details window for:

- Defining a Product Item's Primary Information

- Defining a Product Item's Units of Measure

- Defining a Product Item's Sourcing and Transportation Info

- Defining a Product Item's Inventory Information

- Defining a Product Item's Classifications

- Defining a Product Item's Additional Attributes

- Defining Product Item Associations

- Defining a Product Item's Node Item Attribute Overrides

- Defining a Product Item's Associated Service Items

- Defining a Product Item's Instructions

- Defining a Product Item's Kit Components

- Defining a Product Item's Container Attributes

- Defining a Product Item's Extended Attributes

4.1.2.1 Defining a Product Item's Primary Information

A product item's primary information provides general information about the item.

Some of these attributes can also be specified at the classification level. For more information on viewing inheritable attributes, see Section 4.1.2.5, "Viewing Inheritable Attributes" on page 64.

For more information on defining common item attributes, see Section 4.6.3.3, "Defining Common Item Attributes for a Classification Value" on page 128.

To set up an item's primary information:

1. In the Item Details window, choose the Primary Info tab.

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

Other Attributes	Associations	Node Items	Available Services	Item Instructions

Primary Info	Units Of Measure	Sourcing/Transportation	Inventory Info	Classifications

Master Catalog [ ]   Kit Code [▼]

Short Description [test]

Description [ ]

GTIN [ ]   GTIN Manufacturer Prefix Length [ ]

Status [Held (Unpublished) ▼]   Cost Currency [US Dollar ▼]

Minimum Order Quantity [0]   Maximum Order Quantity [0]

Unit Cost [0]   Computed Cost [0.00]

Size Code [ ]   Color Code [ ]

☐ Taxable   ☐ Can Be Added To Work Order As Service Tool

Source

Manufacturer's Name [ ]   Manufacturer's Item [ ]

Manufacturer's Item Description [ ]   Country of Origin [ ]

Reverse Logistics

Returnable [▼]   Return Window Days [ ]

☐ Credit Without Receipt

Extended Description

[Localize...]

Table 4–2   Primary Info Tab

Field	Description
Master Catalog	Select the master catalog you want to include the item in.
Kit Code	If the item is a kit item, select whether it is a physical kit, logical kit, or dynamic physical kit. A physical kit is maintained as a single item. A logical kit contains components that are inventoried and picked separately. A dynamic physical kit contains individual kit items that may require value-added services to be performed in at the node. If you select dynamic physical kit, the Other Services tab is enabled on the Available Services tab. From this tab kitting and de-kitting services can be selected for the creation of appropriate work orders for kit creation. **Note:** If you select a kit code for an item an additional Kit Components tab is displayed in the Item Details window.
Short Description	Enter a brief description of the item.
Description	Enter a more detailed description of the item.
Cost Currency	The currency for the cost of the item, such as Euro or Dollar.
GTIN	Enter the item's Global Trade Item Number (GTIN). GTIN is the evolving standard for product identification. Yantra 7x uses GTIN to cross-reference between item definitions of different catalog organizations. For more information about defining catalog organizations, see the *Yantra 7x Platform Configuration Guide*.
GTIN Manufacturer Prefix Length	Manufacturer's prefix length specified in the GTIN.
Status	Select Held to make the item unavailable. Such items are not processed by Yantra 7x APIs. Choose Published to make the item available to the APIs.

Table 4–2   Primary Info Tab

Field	Description
Minimum Order Quantity	Enter a minimum quantity that an order can be made for against the item. **Note:** This field has no logic associated with it and can be configured as per your business practices. However, the system does not allow you to enter a minimum quantity that is greater than the maximum quantity.
Maximum Order Quantity	Enter a maximum quantity that an order can be made for against the item. **Note:** This field has no logic associated with it and can be configured as per your business practices. However, the system does not allow you to enter a maximum quantity that is less than the minimum quantity.
Unit Cost	Enter the cost of the item. All cycle counts are based on the unit cost of the item.
Computed Cost	The computed cost of the item.
Taxable	Select Taxable if the item is taxed.
Can Be Added To Work Order As Service Tool	Select Can be Added To Work Order As Service Tool to allow the item to be used as a service tool on a work order. A service tool can still serve as a regular product item whose inventory can be adjusted and tracked within Yantra 7x. Additionally, it can be associated with a work order as a tool that may be used by a resource to execute the work order's services.
Size Code	Enter the size code of the item.
Color Code	Enter the color code of the item.
Source	
Manufacturer's Name	Enter the name of the manufacturer who made the item.
Manufacturer's Item	Enter the identifier that the manufacturer uses to identify the item.
Manufacturer's Item Description	Enter the description the manufacturer uses for the item.
Country of Origin	Click 🔍 and select the country code.
Reverse Logistics	

Table 4–2   Primary Info Tab

Field	Description
Returnable	Select "Yes" if the buyer can return the item.
Return Window Days	Enter the number of days from receipt of the item that the Buyer has to return the item.
Credit Without Receipt	Check Credit Without Receipt if the Buyer can receive credit for the item before returning it.
Extended Description	You can enter a detailed description about the item including any notes or handling instructions.
	Choose the Localize button to enter description in the multiple languages of the locales you may have configured.
	Note: All locale configuration should be completed before attempting to enter an extended item description. For more information about configuring locales, see the *Yantra 7x Platform Configuration Guide*.

4.1.2.2 Defining a Product Item's Units of Measure

You can provide an item's weight and dimensions for shipping and storage purposes. You can also configure any alternate pricing and ordering units of measure an item may have.

To set up an item's measurements:

1. In the Item Details window, choose the Units Of Measure tab.

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

Table 4–3   Units Of Measure Tab

Field	Description
Weight	Enter the item's numerical weight and select its unit of measure (for example, lbs.) from Weight UOM.
Length	Enter the item's numerical length and select its unit of measure (for example, inches) from Length UOM.
Width	Enter the item's numerical width and select its unit of measure (for example, inches) from Width UOM.
Height	Enter the item's numerical height and select its unit of measure (for example, inches) from Height UOM.
Pricing	

Table 4–3   Units Of Measure Tab

Field	Description
Pricing UOM Different Is From Inventory UOM	Select Pricing UOM Different Is From Inventory UOM, if this item uses a different unit of measure for pricing calculations than the unit of measure associated with the actual inventory product item. For example, you are creating a product item called Apples. Apples are inventoried and sold as a unit of measure called Cases. However, the pricing is determined by the weight of each case. In this scenario, you would assign the product item Apples the inventory unit of measure Cases and the pricing unit of measure Weight.
Pricing UOM	If you selected Pricing UOM Different Is From Inventory UOM, select the unit of measure you want to use to price this item.
Default Pricing UOM Conversion Factor	Enter the conversion rate from the inventory unit of measure to the pricing unit of measure. For example, a product item has a inventory unit of measure of EACH and a pricing unit of measure of CASE. 4 EACH make up 1 CASE. In this scenario, you would enter '4' as the conversion factor.
Alternate UOMs	A list of alternate units of measure used by the item ID/unit of measure combination you are defining. For more information about alternate ordering units of measure, see Section 4.1.2.2.1, "Adding an Alternate Unit of Measure to a Product Item" on page 55.
UOM	The unit of measure.
Quantity	The conversion rate from the inventory unit of measure to the alternate unit of measure.
Ordering UOM	Indicates that the unit of measure can be used in the selling environment.

You can use the Units Of Measure tab for:

- Adding an Alternate Unit of Measure to a Product Item

- Modifying a Product Item's Alternate Unit of Measure

- Removing a Product Item's Alternate Unit of Measure

4.1.2.2.1 Adding an Alternate Unit of Measure to a Product Item

You may need to create a product item that has multiple ways in which its unique item ID/unit of measure combination can be packaged. In this case you can create alternate ordering units of measure that can be used in the selling environment.

For example, you may create a unique item ID/unit of measure combination for a 6-Pack of Pens. However, in your selling environment you sell this item one of three ways: individually, cases, and pallets. In this scenario you can create three alternate units of measure that can be associated with the 6-Pack inventory unit of measure: 6-Pack, Case, and Pallet.

To add an alternate unit of measure:

1. In the Units of Measure tab, choose ➕ from the Alternate UOMs table. The Alternate UOM Details pop-up window is displayed.

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

3. Choose 💾.
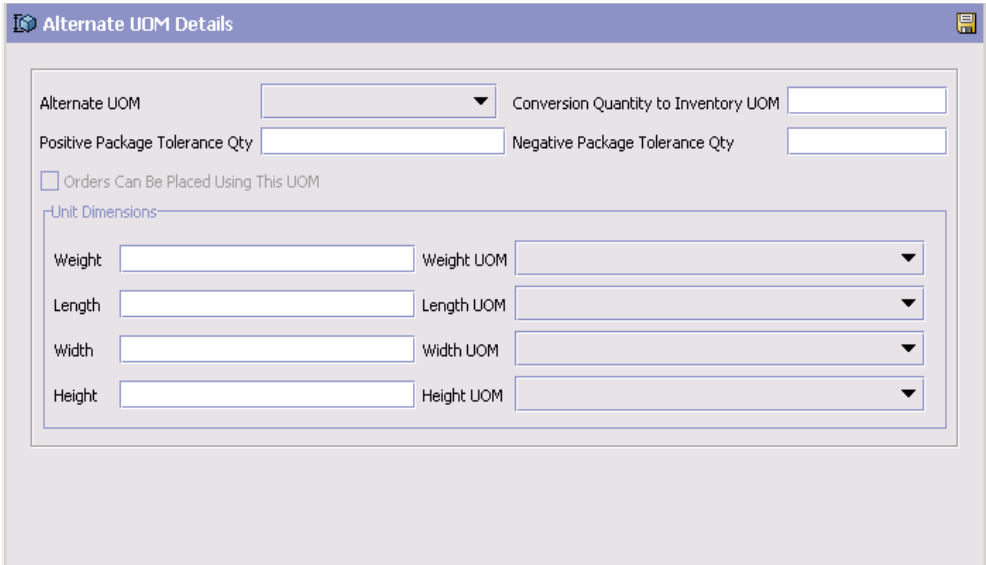
Table 4–4   Alternate UOM Details Pop-Up Window

Field	Description
Alternate UOM	Select the alternate unit of measure you want to use.
Conversion Quantity to Inventory UOM	Enter the conversion quantity from the inventory unit of measure to the alternate unit of measure. For example, you are configuring an alternate unit of measure called DOZEN for a product item with an inventory unit of measure of EACH. 12 EACH make up 1 DOZEN. In this scenario, you would enter '12' as the conversion quantity. **Important:** This field should be configured at the beginning of an implementation. Do not modify this field once orders exist in the system.
Positive Package Tolerance Qty	This field is not used in this release.
Negative Package Tolerance Qty	This field is not used in this release.
Orders Can Be Placed Using This UOM	Select Orders Can Be Placed Using This UOM if this unit of measure can be used for the particular item ID/unit of measure combination in a selling environment.
Unit Dimensions	
Weight	Enter the unit of measure's weight.
Length	Enter the unit of measure's length.
Width	Enter the unit of measure's width.
Height	Enter the unit of measure's height.

4.1.2.2.2   Modifying a Product Item's Alternate Unit of Measure

To modify an item's alternate unit of measure:

1. In the Units of Measure tab, select the applicable alternate unit of measure from the Alternate UOMs table and choose �')). The Alternate UOM Details pop-up window is displayed.

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

3. Choose 💾.

4.1.2.2.3   Removing a Product Item's Alternate Unit of Measure

To remove a product item's alternate unit of measure, select the applicable unit of measure from the Alternate UOMs table and choose ✖.

4.1.2.3 Defining a Product Item's Sourcing and Transportation Info
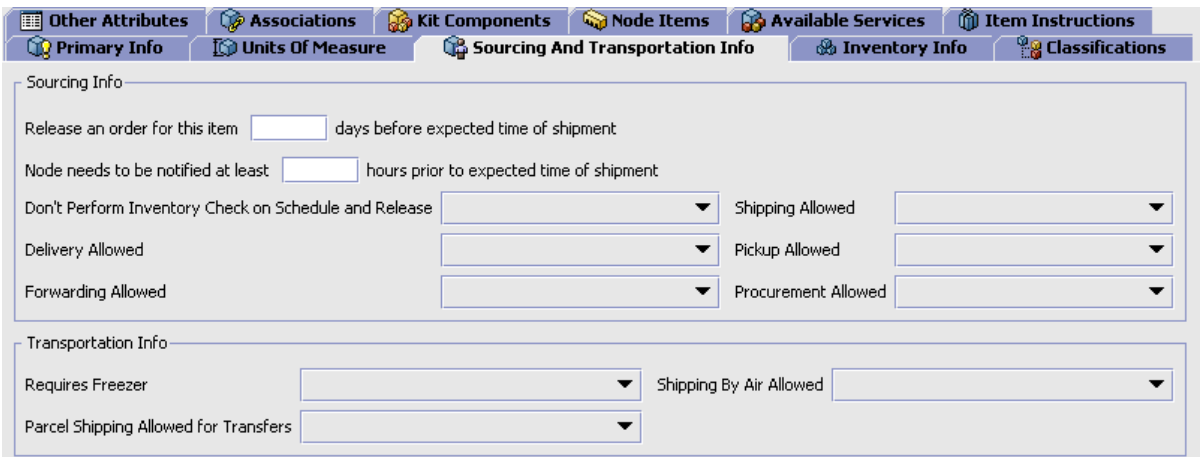
You can configure attributes in the item's sourcing and transportation information that determine how it is monitored and handled during sourcing and transportation.

Some of these attributes can also be specified at the classification level. For more information on viewing inheritable attributes, see Section 4.1.2.5, "Viewing Inheritable Attributes" on page 64.

For more information on defining common item attributes, see Section 4.6.3.3, "Defining Common Item Attributes for a Classification Value" on page 128.

To set up an item's sourcing and transportation information:

1. In the Item Details window, choose the Sourcing and Transportation Info tab.

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

3. Choose 💾.

Table 4–5   Sourcing and Transportation Info Tab

Sourcing Info	
Release an order for this item __ days before expected time of shipment.	Enter the number of days an order for this item should be released before its expected time of shipment.
Node needs to be notified at least __ hours prior to expected time of shipment.	Enter the minimum number of hours a node needs to be notified before the expected time of shipment.
Don't Perform Inventory Check on Schedule and Release	Specify whether inventory checks should be performed during Schedule and Release.
Shipping Allowed	Specify whether shipping is allowed.
Delivery Allowed	Specify whether delivery is allowed.
Pickup Allowed	Specify whether pickup is allowed.
Forwarding Allowed	Specify whether forwarding is allowed.
Procurement Allowed	Specify whether procurement is allowed.
Transportation Info	
Requires Freezer	Specify whether items require freezer storage during transportation.
Shipping By Air Allowed	Specify whether items can be shipped by air.
Parcel Shipping Allowed for Transfers	Specify whether parcel shipping is allowed for transfer of items.

4.1.2.4 Defining a Product Item's Inventory Information

You can configure attributes in the item's inventory information that determine how it is monitored and handled for an inventory picture. An inventory picture provides the Yantra 7x Application Consoles user with information about the item's availability and demand. This information can also be used to determine how long it takes to process the item and, if applicable, how long before the item expires.

You can also determine whether or not an item is tag controlled. A tag number is used to uniquely identify an item in the system regardless of the inventory identification numbers you use (for example, lot number

and revision number). Inventory identification numbers are used to differentiate products within inventory physically and systematically as these "product instances" have different characteristics. Some common examples of identification numbers are lot number, revision number, and manufacturing batch number.

While an organization may have multiple inventory identification numbers, these identification numbers are not necessarily relevant to every product in the organization's catalog. For some products, a lot number uniquely defines all characteristics, whereas revision number differentiates another product. The inventory tag number is used to rationalize these different situations. In most cases, the tag number represents one of the inventory identification numbers such as lot number, batch number or revision number based on the product.

For example, you have two different items, one called Item A that is uniquely identified by a lot number and one that it is called Item B and uniquely identified by a revision number. In this case, when an instance of Item A is created with a lot number of 12345, it is also assigned a tag number of 12345. When an instance of Item B is created with a revision number of 98765, it is also assigned a tag number of 98765.

Some of these attributes can also be specified at the classification level. For more information on viewing inheritable attributes, see Section 4.1.2.5, "Viewing Inheritable Attributes" on page 64.

For more information on defining common item attributes, see Section 4.6.3.3, "Defining Common Item Attributes for a Classification Value" on page 128.

To set up an item's inventory information:

1. In the Item Details window, choose the Inventory Info tab.

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

Other Attributes	Associations	Kit Components	Node Items	Available Services	Item Instructions
Primary Info	Units Of Measure	Sourcing And Transportation Info		Inventory Info	Classifications

☐ Time Sensitive	Default Expiration Days `10`
ATP Rule ▼	ATP Monitor Rule `ItemRule` ▼
Node Level ATP Monitor Rule ▼	Default Product Class ▼
Track FIFO in Inventory ▼	Lead Days
Future Safety Factor Percentage	Primary Supplier ▼
⦿ Onhand Safety Factor Percentage `2`	○ Onhand Safety Factor Quantity
☐ Serial Numbers Tracked In Inventory	☐ Serial Numbers Tracked In Returns And Outbound
Number Of Secondary Serials `0`	

Tag Controlled

○ Not Tag Controlled   ○ Sometimes Tag Controlled   ⦿ Always Tag Controlled

Tag Identifiers

Attribute	Tag Identifier
LotNumber	☐
BatchNo	☐
RevisionNo	☐

Tag Attributes

Attribute	Tag Descriptor
LotKeyReference	☐
ManufacturingDate	☐
LotAttribute1	☐
LotAttribute2	☐
LotNumber	☐
BatchNo	☐
LotAttribute3	☐
RevisionNo	☐

Table 4–6   Inventory Info Tab

Field	Description
Time Sensitive	Select Time Sensitive if the item is perishable with a specific ship-by date.
	If the ship-by date is not provided for a time sensitive item:
	For a positive adjustment the ship by date is calculated as System Date + default expiration days and creates/adds supply.
	For a negative adjustments, the system reduces the supply in order of first expired first out (FEFO). If there is not enough available quantity, a new supply record with a negative figure is created for a date 01/01/2500. For example, if FEFO is allowed and no ship by date is entered and the user tries to reduce inventory by 50 when a supply record of 40 is available, the system reduces this supply to zero and creates another supply record with a quantity of -10 and 01/01/2500 as the ship-by date.
Default Expiration Days	Enter the number of days an item is available after it is received. After this period of time, the item is no longer considered as available inventory.
	For example, if you sell roses and know they expire 3 days, enter 3.
ATP Rule	Select an ATP Rule to use for this item. The parameters defined in ATP rules are used to determine the available inventory for this item. For more information about ATP rules, see the *Yantra 7x Inventory Synchronization Configuration Guide*.
	Note: If you do not choose an ATP rule, the system's DEFAULT ATP rule is used.
ATP Monitor Rule	Select an Inventory Monitoring Rule to use for this item. The minimum inventory levels for this item are based on the parameters set up for the selected ATP Monitoring Rule. For more information about ATP monitoring rules, see the *Yantra 7x Inventory Synchronization Configuration Guide*.

Table 4–6   Inventory Info Tab

Field	Description
Node Level ATP Monitor Rule	Select an Node Level Inventory Monitoring Rule to use for this item. The minimum inventory levels for this item are based on the parameters set up for the selected ATP Monitoring Rule. For more information about ATP monitoring rules, see the *Yantra 7x Inventory Synchronization Configuration Guide*.
Default Product Class	Select any of the configured product classes based on your business practices. For more information about product classes, see the *Yantra 7x Platform Configuration Guide*.
Track FIFO in Inventory	Indicates that inventory needs to be tracked using the First In First Out (FIFO) number. The FIFO number is automatically generated by the system.
Lead Days	Enter the amount of time (in days) needed to procure the item and make it available for shipping.
Future Safety Factor Percentage	Enter the percentage of inventory for this item you want to exclude from future inventory availability.
Primary Supplier	Enter the primary supplier for this item.
Onhand Safety Factor Percentage	Enter the percentage of inventory for this item you want to exclude from on hand inventory availability. If this option is chosen, you cannot specify an Onhand Safety Factor Quantity.
Onhand Safety Factor Quantity	Enter the quantity of inventory for this item you want to exclude from on hand inventory availability. If this option is chosen, you cannot specify an Onhand Safety Factor Percentage.
Serial Numbers Tracked In Inventory	Select Serial Numbers Tracked In Inventory to enable location level tracking by serial number in Yantra 7x WMS.
Serial Numbers Tracked In Returns And Outbound	Select Serial Numbers Tracked In Returns And Outbound to ensure that serial numbers are captured by the system during the outbound and return processes.
Number of Secondary Serials	Enter the number (0-9) of secondary serial numbers you want to use for serial number tracking.

Table 4–6   Inventory Info Tab

Field	Description
Tag Controlled	
Not Tag Controlled	Select Not Tag Controlled if you do not want to use a tag number to uniquely identify an item in the system.
Sometimes Tag Controlled	Select Sometimes Tag Controlled if you want to be able to assign a tag number to identify an item in special circumstances, such as customer pick-up.
Always Tag Controlled	Select Always Tag Controlled if you want to always use a tag number to uniquely identify different instances of this item in the system.
Tag Identifiers	
	This table appears when either Sometimes Tag Controlled or Always Tag Controlled are selected. In the table select one or more attributes to be used as tag identifiers for the item.
	The combination of the tag identifiers will generate the tag number that the system will use to identify tag controlled items.
Tag Attributes	
	This table appears when either Sometimes Tag Controlled or Always Tag Controlled are selected. In the table select one or more attributes to be used as tag descriptors for the item.
	The tag attributes will not generate a tag number. They are used for informational purposes, and only the attributes that have been checked will be exposed in the UI.

Note: If any safety factor value (quantity or percentage) is available from the item's classification, but an on hand safety factor value (quantity or percentage) is specified at the item level, Yantra will always use the value specified at the item level, and will not inherit the value from the item's classification.

4.1.2.5 Viewing Inheritable Attributes

Some attributes located on the Sourcing and Transportation Info, Inventory Info, and Extended Attributes windows, can be specified as common item attributes at the classification level. For more information on defining common item attributes, see Section 4.6.3.3, "Defining Common Item Attributes for a Classification Value" on page 128.

To view inheritable attributes:

1. In the Item Details window, choose . The Inheritable Attributes pop-up window appears.

Name	Value	Classification Path	Is Inherited
Onhand Safety Factor Quantity	10.0	/Class1/CV1	N
ATP Monitor Rule	new	/Class1/CV1	N
ATP Rule	DEFAULT	/Class1/CV1	Y

Table 4–7   Inheritable Attributes Pop-up Window

Field	Description
Name	The name of the attribute.
Value	The value specified for the attribute at the classification level.
Classification Path	This path indicates the location of the classification where the common item attribute has been specified.
Is Inherited	Indicates whether the value for this attribute is inherited for this item.

4.1.2.6 Defining a Product Item's Classifications

You can set up codes and classifications necessary for shipping an item. The fields within this screen can be entered as free form text or classification hierarchies can be created so that the values of the fields can be selected from a list of pre-defined values. For more information about classifications and classic at ion hierarchies, see Section 4.6, "Defining Classifications" on page 118.

To set up an item's classifications:

1. In the Item Details window, choose the Classifications tab.

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

Table 4–8   Classifications Tab

Field	Description
Standard Classification	
Harmonized Code	Enter the item's harmonized code. If the classification purpose has been defined for the purpose definition 'Harmonized Code', the ![icon] icon is displayed. Click it to display the classification definition that it has been bound to.
Schedule B Code	Enter the item's schedule B code. If the classification purpose has been defined for the purpose definition 'Schedule B Code', the ![icon] icon is displayed. Click it to display the classification definition that it has been bound to.

Table 4–8   Classifications Tab

Field	Description
Commodity Code	Enter the item's commodity code. If the classification purpose has been defined for the purpose definition 'Commodity Code', the 🔍 icon is displayed. Click it to display the classification definition that it has been bound to.
NMFC Code	Enter the item's National Motor Freight Code. If the classification purpose has been defined for the purpose definition 'NMFC Code', the 🔍 icon is displayed. Click it to display the classification definition that it has been bound to.
ECCN Number	Enter the item's Export Commodity Control Number. If the classification purpose has been defined for the purpose definition 'EECN Number', the 🔍 icon is displayed. Click it to display the classification definition that it has been bound to.
NAICS Code	Enter the item's North American Industry Classification System code. If the classification purpose has been defined for the purpose definition 'NAICS Code', the 🔍 icon is displayed. Click it to display the classification definition that it has been bound to.
UNSPSC	Enter the item's United Nations Standard Product and Services Code. If the classification purpose has been defined for the purpose definition 'UNSPC, the 🔍 icon is displayed. Click it to display the classification definition that it has been bound to.
NMFC Class	The National Motor Freight Code Class of the item.
Tax Product Code	Enter the item's tax product code.
Cost Posting Classification	The Cost Posting Classification of the item.
Hazardous Material Class	Enter the item's hazardous material class. If the classification purpose has been defined for the purpose definition 'HazmatClass', the 🔍 icon displays. Click to display the classification definition that it has been bound to.

Table 4–8   Classifications Tab

Field	Description
Is Hazardous Item	If the hazardous material class is a valid hazmat compliance entry, when you click 🖫, this check box is automatically selected to indicate that the item is a hazardous item. Select the check box, if applicable.
Model	Enter the model number of the item.
Organizational Classification	
Product Line	Enter the product line as per your business practices. If the classification purpose has been defined for the purpose definition 'Product Line', the 🔍 icon is displayed. Click it to display the classification definition that it has been bound to.
Item Type	Enter the item type as per your business practices. If the classification purpose has been defined for the purpose definition 'Item Type', the 🔍 icon is displayed. Click it to display the classification definition that it has been bound to.
Operational Classification	
Storage Type	Enter the item's storage code. The storage code indicates any special attributes of the item that may require it to be stored at a certain location in a warehouse. If the classification purpose has been defined for the purpose definition 'Storage Type', the 🔍 icon is displayed. Click it to display the classification definition that it has been bound to.
Picking Type	This field is not used in this version.
Velocity Code	Enter the item's velocity code. The velocity code indicates the item's turn over rate in a warehouse.
Operational Configuration Complete	This field is not used in this version.

Table 4–8   Classifications Tab

Field	Description
Hazmat Information	This panel displays when a value is entered in the Hazardous Material Class field and the Is Hazardous Item checkbox is selected.
	If the value entered in the Hazardous Material Class field is valid, then the Hazmat Information panel displays with values populated.
	If the value entered in Hazardous Material Class field is invalid, then the Hazmat Information panel displays with blank values.
Symbols	Indicates the hazmat symbol of the hazardous item.
Proper Shipping Name	The proper shipping name or description of the hazardous item.
Hazard Class	The item's hazard class.
UN Number	This is a four-digit number, which identifies hazardous items (such as explosives and poisonous materials) of commercial importance. This numbering scheme is widely used in international commerce. For instance, to label the contents of shipping containers.
Packing Group	Indicates the degree of danger of a hazardous item within its hazard class or division, and the type of packaging required for the item. The valid values are: Packing Group I - high danger, Packing Group II - medium danger, Packing Group III - Low danger.
Label Code	The label code of the hazardous item.
Special Provisions	Special provisions to be provided for shipping the hazardous item.
Exception	The packing exception for shipping the hazardous item.

4.1.2.7 Defining a Product Item's Additional Attributes

You can set up any additional attributes created in Catalog Configurations. You can also configure any aliases and item exclusion codes.

To define an item's additional attributes:

1. In the Item Details window, choose the Other Attributes tab.

2. Enter information in the applicable fields. Refer to Table 4–9 for field value descriptions.

Table 4–9 Other Attributes Tab

Field	Description
Additional Attributes	Any additional attributes that have been created in Catalog Configurations. Enter information as per your business practices. For more information about creating additional attributes for an item, see Section 3.2, "Defining Additional Attributes".

Table 4–9   Other Attributes Tab

Field	Description
Aliases	Any aliases that have been created in Item Attributes. An item's alias is an identifier for an item. Enter information as per your business practices. For more information about creating aliases, see Section 4.7, "Defining Item Attributes".
Item Exclusion Codes	Any item exclusion codes that have been created in Item Attributes. An item exclusion code may be set up if your business practices involve the regulation of item shipments for certain countries. For example, if there are certain countries that you ship to that do not allow items with certain hazardous materials to be shipped to them, you may create an item exclusion code that you can associate with any of your items that may contain the certain hazardous material.
	You can add and remove pertinent item exclusion codes using the arrow buttons.
	For more information about creating item exclusion codes, see Section 4.7, "Defining Item Attributes".

4.1.2.8 Defining Product Item Associations

You can set up cross-sell, up-sell, and substitution associations that apply to the item. You can set up an item's association on an item-by-item basis or by queries under which particular items fall.

Cross-Sell

A cross-sell promotes an add-on or accessory item that, when combined with the primary item, makes a "better" package. For example, there is a shirt in your inventory that matches a pair of shoes. When you create the shoes item in the catalog, you associate the shirt as a cross-sell. This way when the customer orders the shoes it is possible to notify them about the matching shirt.

Up-Sell

An up-sell promotes a more powerful or higher-level item. For example, in your inventory you have a certain model of running shoe that comes in one of two ways, an inexpensive, lower-quality version or an expensive, top-of-the-line version. When you create the catalog item for the lower-quality shoes you associate the more expensive shoes as an

up-sell. When the customer goes to order the lower-quality shoes it is possible to notify them about the higher-quality shoes.

Substitution

Setting up a substitution association provides the ability to recognize that an ordered item can be substituted with one or more other items. For example, in your inventory you have a very popular brand of shoe that sells out quickly. There are other comparable brands of shoes that are popular but don't sell as much. When you create a catalog item for the popular brand of shoes you associate the other shoes as substitutions. When a customer orders the popular brand of shoes that are not in stock, they can be given the option to substitute for one of the other shoes.

You can set up an item's association in two different ways:

- Association by Item

- Association by Query

4.1.2.8.1 Association by Item

1. In the Item Details window, click on the Associations tab.

Other Attributes	Associations	Node Items	Available Services	Item Instructions			
Primary Info		Units Of Measure		Inventory Info		Classifications	
Organization	Item ID	UOM	Quantity	Effective From	Effective To	Priority

Tree items: CrossSell — Items, Queries; Substitutions — Items, Queries; UpSell — Items, Queries
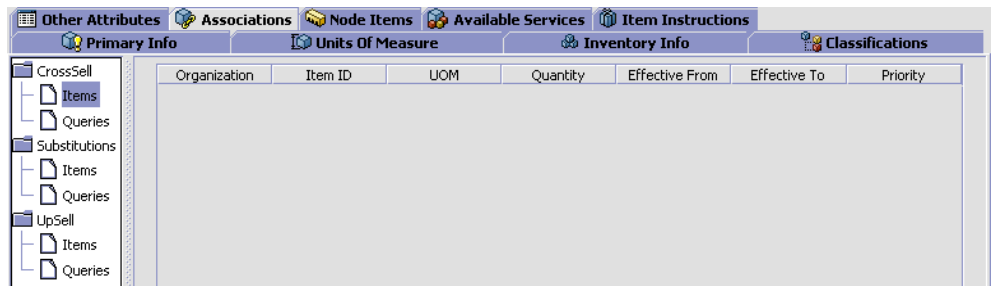
2. Expand the branch of the association type you want to set up for the item.

3. Highlight Items and click on 🦺. Refer to Table 4–10 for field value descriptions. Enter information in the applicable fields.

4. Click on 💾.

Table 4–10   Association by Items

Field	Description
Item ID	Enter the item's ID.
UOM	Select the item's UOM from the drop-down menu.
Effective Date From	Enter the date from which the association will be valid.
Effective Date To	Enter the date until which the association will be valid.
Quantity	Enter the quantity of that item required for the association to be valid. For example, one could say that two 1-litter bottles of water are a substitution for one 2-litter bottle of water.
Priority	Enter the priority the item has over another associated item.

4.1.2.8.2   Association by Query

1. In the Item Details window, click on the Associations tab.
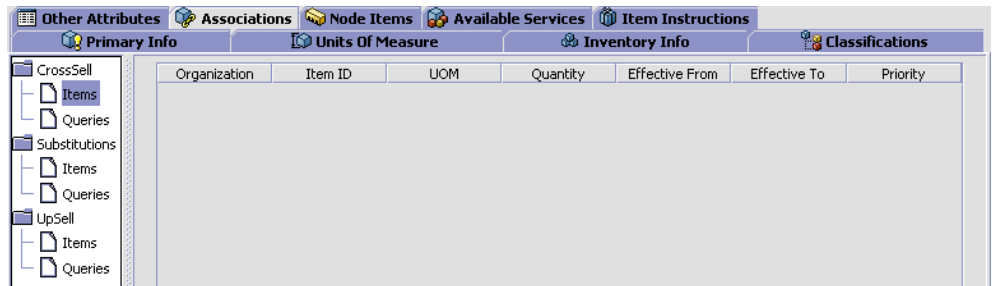
2. Expand the branch of the association type you want to set up for the item.

3. Highlight Query and click on 🐾. Enter information in the applicable fields. Refer to Table 4–11 for field value descriptions.

4. Click on 💾.

Table 4−11   Association by Queries

Field	Description
Query Name	Enter the name of the query.
Start Date	Enter the date from which the association will be valid.
End Date	Enter the date until which the association will be valid.
Item Query Window	Use this window to create the item query you want to create the association with. For more information on creating item queries, refer to Section 4.1.5, "Using the Condition Builder" on page 88.

4.1.2.9 Defining a Product Item's Node Item Attribute Overrides

You can define item attribute overrides at a given node within your organization. The attributes you assign at the node level will override any of the associated attributes that have been defined for an item when an order containing that item is released to the node. For more information about defining item attribute overrides at the node level, see Section 4.2, "Defining Item Attribute Overrides at the Node Level" on page 97.

4.1.2.10 Defining a Product Item's Associated Service Items

You can associate service items that can optionally be ordered when this product item is ordered. For example, you can create a Dishwasher product item and associate a 2-man Delivery delivery service item and an Installation provided service item with it. These service items are then available to the customer as additional options to them when they order the product item.

You can also associate other valued added services such as kitting service, which defines a process for how to assemble the item.
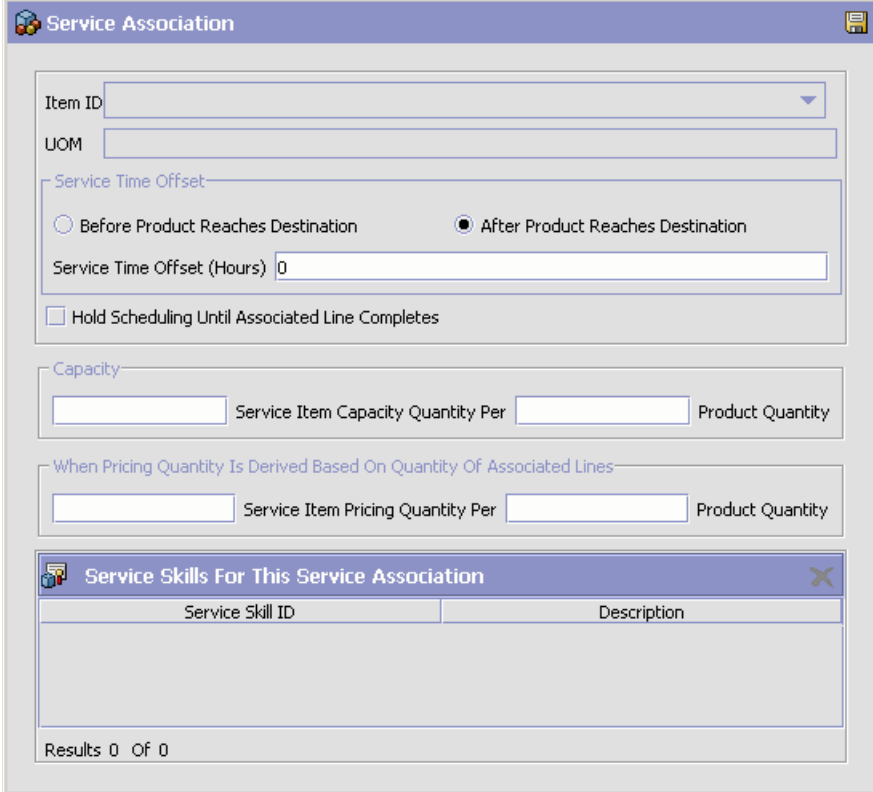
You can use the Available Services tab for:

•   Associating a Service Item with a Product Item

•   Modifying Service Items Associated with a Product Item

•   Deleting a Service Item Associated with a Product Item

4.1.2.10.1 Associating a Service Item with a Product Item

To associate service items to a product item:

1. In the Item Details window, choose the Available Services tab.

2. In the Available Services tab, choose the Provided Services tab to associate a provided service item or the Delivery Services tab to associate a delivery service.

3. From the Available Services table, choose ✚. The Service Association pop-up window appears.

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

5. Choose 🖫.

Table 4—12   Service Association Pop-Up Window

Field	Description
Item ID	Select the service item ID.
UOM	Select the service item's unit of measure.
Service Time Offset	Enter the time difference between provided service and product delivery (in hours). For example, if you are configuring a Door product item that requires an Measurement provided service one day before it can be delivered using a 1-Man Delivery delivery service, you would set Service Time Offset to 24 hours.
Hold Scheduling Until Associated Line Completes	Select Hold Scheduling Until Associated Line Completes if you do not want the service item to be scheduled until the product item has been shipped.
Capacity	
Service Item Capacity Quantity Per	Enter the resource pool capacity that is used up for a defined ordered product quantity as per the service items unit of measure. For example, if it takes one hour to install one dishwasher, you can configure an Installation provided service with a unit of measure of hours to consume one hour of resource capacity per one Dishwasher product item ordered.
Product Quantity	Enter the quantity of the product item against which capacity quantity is consumed.
When Pricing Quantity Is Derived Based On Quantity Of Associated Lines	
Service Item Pricing Quantity Per	Enter how much of the service pricing unit of measure is used per the specified product quantity. For example, you are defining an Installation provided service for a Carpet product item and the pricing unit of measure for Installation is HOURS. It takes 2 HOURS per 300 SQAUARE FEET of Carpet. You would enter '2' in this field.
Product Quantity	Enter the quantity of the product item against which pricing quantity is determined.
Service Skills for This Service Association	

Table 4–12   Service Association Pop-Up Window

Field	Description
Service Skill ID	List of service skill IDs for the item service association. For information about adding service skills to an item service association, see Section 4.1.2.10.4, "Adding a Service Skill to a Service Association" on page 78. For information about removing service skills from an item service associations, see Section 4.1.2.10.5, "Removing a Service Skill from a Service Association" on page 78.
Description	Brief description of each service skill listed.

4.1.2.10.2   Modifying Service Items Associated with a Product Item

To modify service items associated with a product item:

1. In the Item Details window, choose the Available Services tab.

2. In the Available Services tab, choose the Provided Services tab to modify associated provided service items or the Delivery Services tab to modify associated delivery services.

3. From the Available Services table, select the applicable service item association and choose 🕸. The Service Association pop-up window appears.

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

5. Choose 💾.

4.1.2.10.3   Deleting a Service Item Associated with a Product Item

To delete a service item associated with a product:

1. In the Item Details window, choose the Available Services tab.

2. In the Available Services tab, choose the Provided Services tab to delete associated provided service items or the Delivery Services tab to delete associated delivery services.

3. From the Available Services table, select the applicable service item association and choose ✖.

4.1.2.10.4   Adding a Service Skill to a Service Association

You can add multiple service skills to a service association. The service skill table for the item service association manages service skills for that service association.

To add a service skill to a service association:

1.   In the Service Association Details window, choose ✚ from the "Service Skills For This Service Association" table. The Service Skills List pop-up window appears.

2.   Select the applicable service skills and choose 🖫. The service skill is added to the Service Skills table.

4.1.2.10.5   Removing a Service Skill from a Service Association

To remove a service skill from a service association, in the Service Association Details window, select the applicable service skill from the "Service Skills For This Service Association" table and choose ✖.

4.1.2.11 Defining a Product Item's Instructions

You can define any special instructions that pertain to a product item. For example, you can associate a special instruction of Handle With Care with a fragile product item.

You can use the Item Instructions tab for:

•   Adding a Product Item Instruction

•   Modifying a Product Item Instruction

•   Deleting a Product Item Instruction

4.1.2.11.1   Adding a Product Item Instruction

To add a product item instruction:

1.   In the Item Details window, choose the Item Instructions tab.

2.   From the Item Instructions table, choose 🗐. The Item Instruction Details pop-up window appears.

3.   Enter information in the applicable fields. Refer to Table 4–13 for field value descriptions.

4.   Choose 🖫.

Table 4–13   Item Instruction Details Pop-Up Window

Field	Description
Item Instruction Type	Select the item instruction type. For example, a Handling item type indicates the instruction pertains to handling the product item.
Sequence No	If there are multiple, sequential instructions for the product item, enter the sequence of the instruction you are adding.
Use Item Instruction Code	Choose Use Item Instruction Code if you want to use a pre-existing item instruction code. For example, you could have a pre-existing Handle With Care item instruction code that you can associate with fragile items.
Item Instruction Code	If you chose Use Item Instruction Code, select the applicable item instruction code.

Table 4−13   Item Instruction Details Pop-Up Window

Field	Description
Create New Item Instruction	Select Create New Item Instruction if no pre-existing item instruction code exists and you want to create a free-form text instruction.
Text	If you selected Create New Item Instruction, enter the instruction.

4.1.2.11.2   Modifying a Product Item Instruction

To modify a product item instruction:

1. In the Item Details window, choose the Item Instructions tab.

2. From the Item Instructions table, select the applicable item instruction choose ⬛. The Item Instruction Details pop-up window appears.

3. Enter information in the applicable fields. Refer to Table 4−13 for field value descriptions.

4. Choose ⬛.

4.1.2.11.3   Deleting a Product Item Instruction

To delete a product item instruction:

1. In the Item Details window, choose the Item Instructions tab.

2. From the Item Instructions table, select the applicable item instruction choose ⬛.

4.1.2.12 Defining a Product Item's Kit Components

If you have identified an item as being a kit item by associating a kit code to it from the Primary Info tab, the Kit Components tab can be used from the Item Details window. On the Kit Components tab you can create a list of items that make up the kit.

> **Important:** In Yantra 7x, orders only support kits with one-tier level, however the Configurator does not prevent you from configuring kits with multiple-tier levels.

You can use the Kit Components tab for:

- Adding a Kit Component to an Item
- Modifying an Item's Kit Component
- Deleting an Item's Kit Component

4.1.2.12.1 Adding a Kit Component to an Item

To add a kit component to an item:

1. In the Item Details window, choose the Kit Components tab.

2. If you are using Yantra 7x inventory costing feature and you identified the kit to be a physical kit, select the cost factor group you want applied for work in process cost computations from the Cost Factor Group to be Used for Physical Kit Cost Calculations drop-down list. This list contains the cost factor groups defined by the catalog organization's Primary Enterprise.

3. From the Components table, choose ✚. The Components Details pop-up window is displayed.

4. Enter information in the applicable fields. Refer to Table 4–14 for field value descriptions.

5. Choose 🖫.

Table 4–14   Components Details Pop-Up Window

Field	Description
Item ID	Select the item you want to add to the kit.
UOM	Select the unit of measure of the item you are adding to the kit.
Quantity	Enter the quantity of the item being added to the kit.

4.1.2.12.2   Modifying an Item's Kit Component

To modify an item's kit component:

1. In the Item Details window, choose the Kit Components tab.

2. From the Components table, select the applicable kit component and choose ⚙. The Components Details pop-up window is displayed.

3. Enter information in the applicable fields. Refer to Table 4–14 for field value descriptions.

4. Choose 🖫.

4.1.2.12.3 Deleting an Item's Kit Component

To delete an item's kit component:

1. In the Item Details window, choose the Kit Components tab.

2. From the Components table, select the applicable kit component and choose ✖.

4.1.2.13 Defining a Product Item's Container Attributes

An item can be a container item, which is used to ship other items. See Section 4.1.1, "Creating a Product Item" on page 46 for information on creating an item that is a container. You can specify the container attributes for an item.

You can use the Container Attributes tab for:

- Adding a SKU Capacity Definition

- Modifying a SKU Capacity Definition

- Deleting a SKU Capacity Definition

To define an item's container attributes:

1. In the Item Details window, choose the Container Attributes tab.

2. Enter information in the applicable fields. Refer to Table 4–15 for field value descriptions.

Table 4−15   Container Attributes Tab

Field	Description
Container Restrictions	
Reserved for the following Buyers	Specify the buyers to whom the container should be reserved. This prevents the use of these containers by other buyers.
	Note: Buyers with containers reserved for their use can only use the reserved containers. They cannot make use of other containers from the common pool.
Reserved for Items having the following Containterization Categories	Select Containerization Categories if you want to reserve the use of this container to items that have been categorized in specific ways. For example, you can restrict the use of this container to items that are categorized as "non-perishable" for the containerization category.
	See Section 4.6, "Defining Classifications" on page 118.
Container Volume	

Table 4–15   Container Attributes Tab

Field	Description
Capacity Volume	Enter the cubic amount that can be placed in this container, and select the cubic unit of measure for that volume (for example, cubic foot, liter).
Volume Allowance	Enter the cubic amount of additional items that can be added when there is are a few remaining items to be containerized. For example, a container has a capacity volume of 100 cubic feet. Two containers have been filled, and there are a few remaining items to be containerized. The remaining items have a volume of two cubic feet. If the Volume Allowance is set to accept two cubic feet, or more, the remaining items are placed in the last container. Leave this field blank to specify no Volume Allowance.
Maximum weight that can be placed in the container	Enter the maximum weight permitted for this container, and select the unit of measure used for that weight.
Container SKU Capacity Definition	
SKU Unit Size Code	Identifies SKU Unit Size Code used to identify items.
Quantity	How many items of the specified SKU Unit Size Code can be placed in this container. In some cases, it is easier to specify the number of items that can be placed in the container than it is to attempt to calculate the number of items based on the size of the items and the volume of the container. For example, you might want to specify the capacity of the container for irregularly shaped items, such as balls, or highly compressible items, such as shirts.
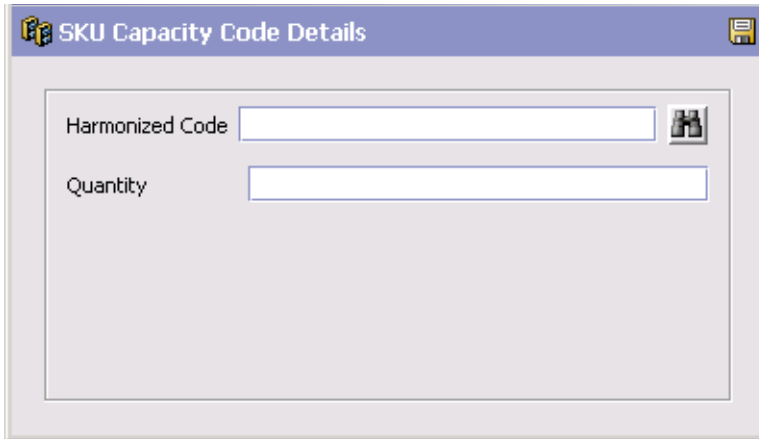
4.1.2.13.1   Adding a SKU Capacity Definition

A SKU capacity definition allows you to configure how many items with a given classification can be placed in this container. The classification is established by binding the "SKU Unit Size Code" to a classification definition. See Section 4.6.1, "Defining Classification Definitions" on page 120.

 To add a SKU Capacity Definition:

1. In the Item Details window, choose the Container Attributes tab.

2. From the Container SKU Capacity Definition table, choose ✚. The SKU Capacity Definition pop-up window is displayed.

3. Enter information in the applicable fields. Refer to Table 4–16 for field value descriptions.

4. Choose 💾.

Table 4–16   SKU Capacity Code Details Pop-up Window

Field	Description
Classification Type	A field used in Classifications is mapped to the SKU unit size code as part of the configuration for Items. The field name displayed here, "Harmonized Code", is an example. See Section 4.6, "Defining Classifications" on page 118.
	Enter a value used in classification to select items that have that classification.
Quantity	Specify how many of this item classification can be placed in the container.

4.1.2.13.2 Modifying a SKU Capacity Definition

To modify a SKU Capacity Definition:

1. In the Item Details window, choose the Container Attributes tab.

2. From the Container SKU Capacity Definition table, select the applicable SKU capacity definition and choose 🐞. The SKU Capacity Code Details pop-up window is displayed.

3. Enter information in the applicable fields. Refer to Table 4–16 for field value descriptions.

4. Choose 💾.

4.1.2.13.3 Deleting a SKU Capacity Definition

To delete a SKU Capacity Definition:

1. In the Item Details window, choose the Container Attributes tab.

2. From the Container SKU Capacity Definition table, select the applicable SKU capacity definition and choose ✘.

4.1.2.14 Defining a Product Item's Extended Attributes

Yantra 7x allows you to create your own extended item attributes. For more information on creating extended item attributes, refer to the *Yantra 7x Customization Guide*.

These attributes can also be specified at the classification level. For more information on viewing inheritable attributes, see Section 4.1.2.5, "Viewing Inheritable Attributes" on page 64.

For more information on defining common item attributes, see Section 4.6.3.3, "Defining Common Item Attributes for a Classification Value" on page 128.

To define a product item's extended attributes:

1. In the Item Details window, choose 🔲. The Extended Attributes pop-up window appears.

2. Enter information into the applicable fields.

3. Click OK. This will close the Extended Attributes pop-up window and return you to the Item Details window.

4. Choose 💾.

4.1.3 Deleting an Item

> **Important:** Before you delete an item you must consider the fact that the item may be used in existing transaction data for inventory, orders, ship advices, returns, distribution rules, and/or price sets. Also, depending on your configuration, external systems may also be referencing this item.

To delete an item:

1. From the tree in the application rules side panel, choose Products > Items. The Product Item Search window appears in the work area.

2. Enter applicable search criteria and choose ![icon]. The Item List is displayed.

3. Select the applicable item and choose ![icon].

4.1.4 Recomputing an Item's Computed Unit Cost

To recompute the unit cost of an item:

1. From the menu bar, choose Applications > Yantra 7x Product Management > Items.

   The Item Search window is displayed.

2. Enter applicable search criteria and choose ![icon]. The Item List is displayed.

3. To recompute unit cost for all items, choose ![icon].

4. To recompute unit cost for a specific item, select the applicable item, right-click, and choose ![icon].

4.1.5 Using the Condition Builder

You can create an item query that you can use to search for items and establish item associations. For more information on item associations, see Section 4.1.2.8, "Defining Product Item Associations" on page 70.

Using the condition builder, you can filter an item search by different query entities: item, item alias, additional item attributes, categories,

and exclusion codes. Through each of these entities, you can use filters by attributes. For example, you can search for an item by its height measurement. You can also use action buttons to create priority and logical operators. For example, to search for items by height and item ID but not by item type, you can group the Height and Item ID fields within parentheses.

4.1.5.1 Using the Condition Builder

To use the condition builder:

1. From the menu bar, choose Applications > Product Management. The Product Management tree is displayed in the applications side panel.

2. From the Product Management tree, choose Products > Items. The Product Item Search window appears in the work area.

3. Click . The Advanced Item Search window is displayed.
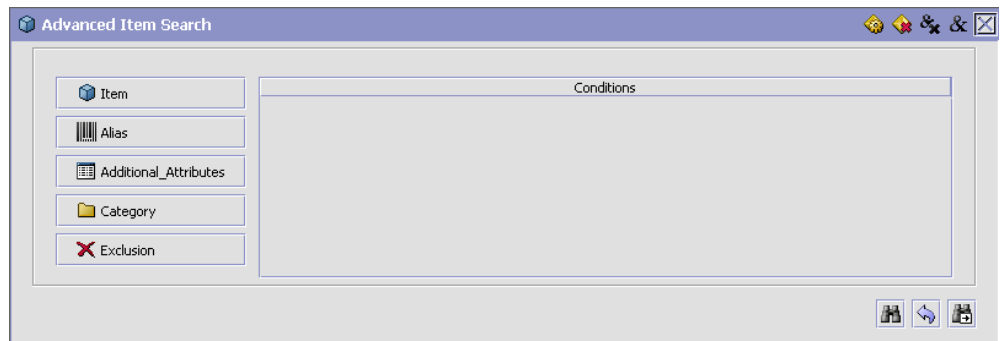
To create an item query:

4. Select a query entity

   Click the query entity button for which you want to build a query. The condition builder popup window appears.
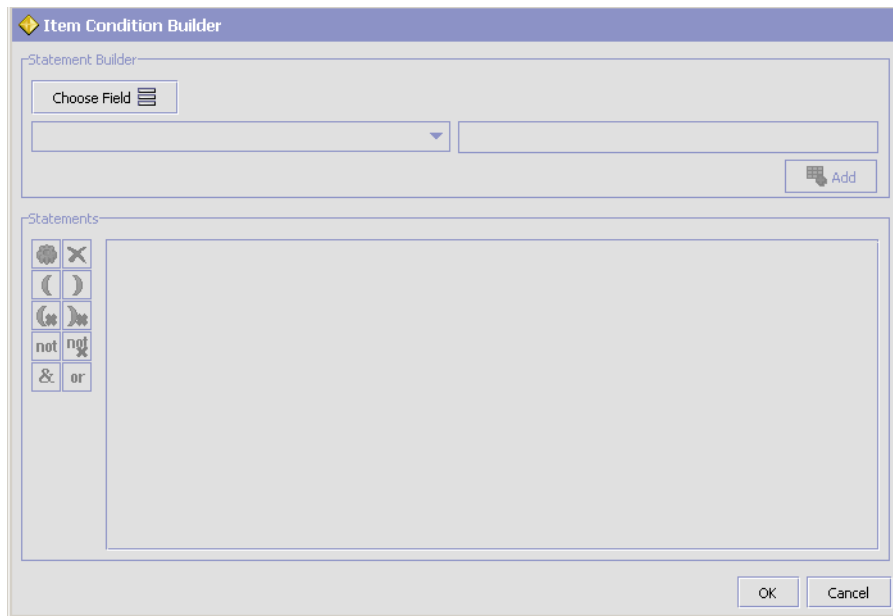
5. Select a statement

   In the condition builder popup window, click on Choose Field and select the exact attribute you want as part of the query. For example, ItemID.

6. Select a query type and attribute value

   In the drop down menu on the left, select the desired query type. In the field on the right, either select the desired attribute value from the drop down menu, or type the value if it is a text field. Click the Add button.
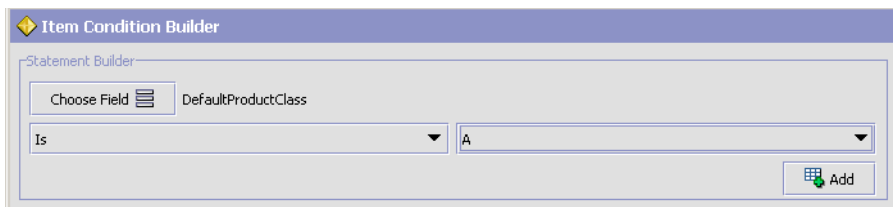
Repeat step 5 and 6 until you have all of the statements you want in your condition.

By default, the statements are connected together through an AND operator.

7. Optionally, edit statements by applying actions

If applicable, highlight the statement you want to edit and select the desired action. Table 4–17, "Statement Actions", describes the possible actions.

Table 4–17   Statement Actions

Action	Description
🌼	Replace the highlighted statement. The Add button is replaced by a Replace button, and the statement can be selected again by going through Step 5.
✖	Delete the highlighted statement.
( )	Create a priority operator. For example, (A AND B) OR C as opposed to A AND (B OR C): The statements within the parenthesis will be evaluated first.
(✖)✖	Remove a priority operator.
not	Create a negation operator. For example, A AND NOT B.
not✖	Remove a negation operator. For example, A AND NOT B would become A AND B.
&	Replace an OR operator by an AND operator.
or	Replace an AND operator by an OR operator.

Once the condition is built as desired, click OK.
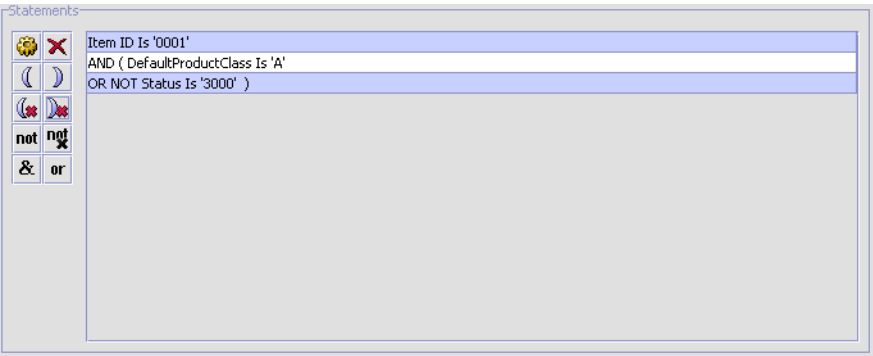
8. Optionally, edit conditions by applying actions.

Repeat steps 4 through 7 until you have all the conditions you need for the query.

By default, the conditions are connected together through an AND operator.

If applicable, highlight the condition you want to edit and select the desired action located in the upper right-hand corner of the window. Table 4–18, "Condition Actions" describes the possible actions.

Table 4–18   Condition Actions

Action	Description
	Return to the condition builder popup window for that condition.
	Delete the highlighted condition.
	Replace an AND operator by an AND NOT operator.
	Replace an AND NOT operator by an AND operator.

Once the condition is built, click
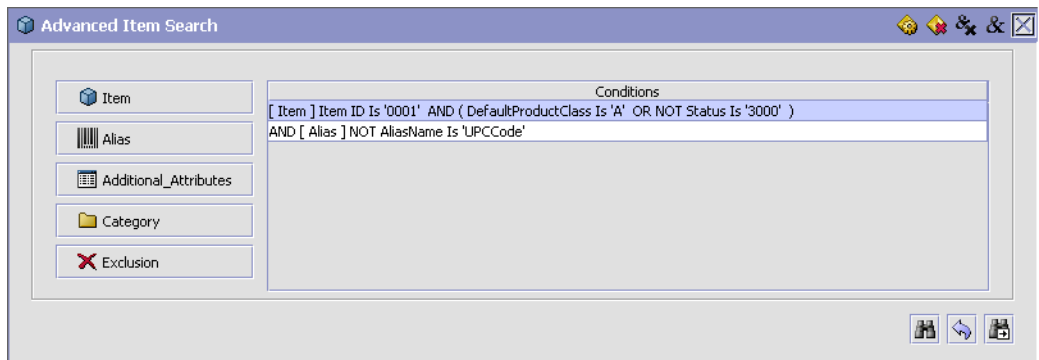
> **Important:** When building queries using the Alias, Additional Attribute, and Exclusion entities, it is important to build conditions in which all attributes for that particular entity go into the same condition and not into multiple conditions.

4.1.5.2 Condition Builder Attributes

Each query entity allows you to build statements based on attributes defined throughout the Yantra 7x Configurator.

- For the Item Condition Builder attributes, refer to Table 4–19.

- For the Alias Condition Builder attributes, refer to Table 4–20.

- For the Additional Attributes Condition Builder attributes, refer to Table 4–21.

- For the Category Condition Builder attributes, refer to Table 4–22.

- For the Exclusion Condition Builder attributes, refer to Table 4–23.

Table 4–19   Item Condition Builder Attributes

Attribute	Description
Primary Info	
Kit Code	The kit code of the item, if applicable. Possible values are Physical Kit, Logical Kit, and Dynamic Physical Kit.
Item ID	The ID of the item.

Table 4–19   Item Condition Builder Attributes

Attribute	Description
Default Product Class	The product class of the item.
Item UOM Master	The unit of measure of the item.
Status	The status of the item. Possible values are Held and Published.
Used As Container For Packing	The flag indicating whether or not the item is a container used for packing.
Global Item ID	The item's global identification number.
Item Type	The item's type.
Can Be Added To Work Order As Service Tool	The flag indicating whether or not the item can be added to a work order as a service tool.
Description	The detailed description of the item.
Short Description	The brief description of the item.
Product Line	The product line of the item.
Manufacturer Name	The name of the manufacturer who made the item.
Manufacturer Item	The identifier that the manufacturer uses to identify the item.
Manufacturer Item Description	The description that the manufacturer uses for the item.
Country of Origin	The country where the item was made.
Taxable Flag	The flag indicating whether or not the item is taxable.
Tax Product Code	The tax product code for this item.
Master Catalog ID	The identification number of the master catalog where the item is listed.
Minimum Order Quantity	The minimum quantity that an order can be placed for against the item.
Maximum Order Quantity	The maximum quantity that an order can be placed for against the item.
Measurements	
Unit Length	The length of the item.
Unit Length UOM	The unit of measure for the length of the item.

Table 4–19   Item Condition Builder Attributes

Attribute	Description
Unit Weight	The weight of the item.
Unit Weight UOM	The unit of measure for the weight of the item.
Unit Height	The height of the item.
Unit Height UOM	The unit of measure for the height of the item.
Unit Width	The width of the item.
Unit Width UOM	The unit of measure for the width of the item.
Inventory Parameters	
Lead Time	The amount of time (in days) needed to procure the item and make it available for shipping.
Tag Control Flag	The flag indicating to what extent the item is tag controlled. Possible values are Yes (always), No (never), and Sometimes.
Time Sensitive	The flag indicating whether or not the item is perishable with a specific ship-by date.
Don't Perform Inventory Check on Schedule and release.	The flag indicating whether or not an inventory check should be performed when scheduling or releasing this item. If this is set to 'Y', no inventory check will occur on schedule or release for this item. If this is set to 'N', inventory checks will occur on schedule and release.
ATP Rule	The ATP rule that is used for this item. For more information on ATP rules, refer to the *Yantra 7x Inventory Synchronization Configuration Guide*.
Inventory Monitor Rule	The inventory monitor rule used to monitor this item's inventory level.
Default Expiration Days	The number of days that an item is available after it is received.
Sourcing and Transportation Info	
Parcel Shipping Allowed for Transfers	The flag indicating whether parcel shipping is allowed for transfer of items.
Requires Freezer	The flag indicating whether items require freezer storage during transportation.
Shipping By Air Allowed	The flag indicating whether items can be shipped by air.

Table 4–19   Item Condition Builder Attributes

Attribute	Description
Classification Codes	
Harmonized Code	The Harmonized Code of the item.
Schedule B Code	The Schedule B Code of the item.
ECCN No	The Export Commodity Control Number of the item.
NMFC Code	The National Motor Freight Code of the item.
NMFC Class	The National Motor Freight Code Class of the item.
UNSPSC	The United Nations Standard Product and Services Code of the item.
Hazmat Class	The Hazardous Material Class of the item.
Commodity Code	The commodity code of the item.

Table 4–20   Alias Condition Builder Attributes

Attribute	Description
Alias	
Alias Name	The name of the item's alias.
Alias Value	The value of the item's alias.

Table 4–21   Additional Attributes Condition Builder Attributes

Attribute	Description
Additional Attributes	
Name	The name of the item's additional attribute.
Value	The value of the item's additional attribute.

Table 4–22   Category Condition Builder Attributes

Attribute	Description
Category	
Category ID	The identification number of the item's category.

Table 4–22   Category Condition Builder Attributes

Attribute	Description
Organization Code	The organization that owns the item.
Category Path	The flattened path of the category tree for an item.

Table 4–23   Exclusion Condition Builder Attributes

Attribute	Description
Exclusion	
Exclusion Code	The item's exclusion code.

4.2 Defining Item Attribute Overrides at the Node Level

You can define item attribute overrides at a given node within your organization. The attributes you assign at the node level will override any of the associated attributes that have been defined for an item when an order containing that item is released to the node.
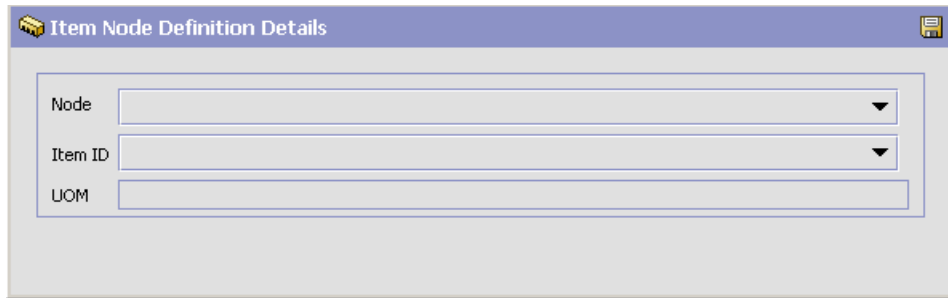
You can use the Node Item Attributes branch for:

- Creating Item Attribute Overrides at the Node Level

- Modifying Item Attribute Overrides at the Node Level

- Deleting Item Attribute Overrides at the Node Level

4.2.1 Creating Item Attribute Overrides at the Node Level

To create item attribute overrides at the node level:

1. From the tree in the application rules side panel, choose Products > Node Item Attributes. The Node Items Search window appears in the work area.

2. Choose . The Create Item Node Definition pop-up window is displayed.

3. From Node, select the node that you want to define item attribute overrides for.

4. From Item ID, select the item whose attributes you want to define overrides for at the node level.

5. From UOM, select the unit of measure of the item ID you have selected to identify the specific item ID/unit of measure combination you want to define overrides for.

6. Choose 🖫. The Node Item Details window is displayed in the work area.

7. In the Node Override Values column, enter the override values for the applicable attributes. For attribute definitions, see Section 4.1.2.6, "Defining a Product Item's Classifications" on page 64.

8. Choose 🖫.

4.2.2 Modifying Item Attribute Overrides at the Node Level

To modify item attribute overrides at the node level:

1. From the tree in the application rules side panel, choose Products > Node Item Attributes. The Node Items Search window appears in the work area.

2. Enter applicable search criteria and choose 🔍. The a list of items associated with the node you searched on is displayed.

3. Select the applicable item and choose 🛠. The Node Item Details window is displayed in the work area.

4. In the Node Override Values column, enter the override values for the applicable attributes. For attribute definitions, see Section 4.1.2.6, "Defining a Product Item's Classifications" on page 64.

5. Choose 💾.

4.2.3 Deleting Item Attribute Overrides at the Node Level

To delete item attribute overrides at the node level:

1. From the tree in the application rules side panel, choose Products > Node Item Attributes. The Node Items Search window appears in the work area.

2. Enter applicable search criteria and choose 🔍. The a list of items associated with the node you searched on is displayed.

3. Select the applicable item and choose ✖.

4.3 Defining Master Units of Measure

You can define a master list of both quantity and pricing units of measure to be used when creating product items.

You can use the Item UOM Master branch for:

- Defining Quantity Units of Measure
- Defining Pricing Units of Measure

4.3.1 Defining Quantity Units of Measure

You can define a master list of quantity units of measure that can be used when defining unique item ID/unit of measure combinations and alternate ordering units of measure. For more information about defining a product item's unique unit of measure and alternate units of measure, see Section 4.1, "Defining Product Items" on page 45.

You can use the Quantity UOMs tab for:

- Creating a Quantity Unit of Measure
- Modifying a Quantity Unit of Measure
- Deleting a Quantity Unit of Measure

4.3.1.1 Creating a Quantity Unit of Measure

To create a quantity unit of measure:

1. From the tree in the application rules side panel, choose Products > Item UOM Master. The Product Item UOM Master window appears in the work area.

2. Choose the Quantity UOMs tab.

3. Choose ➕. The UOM Details pop-up window is displayed in the work area.

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

5. Choose 💾.
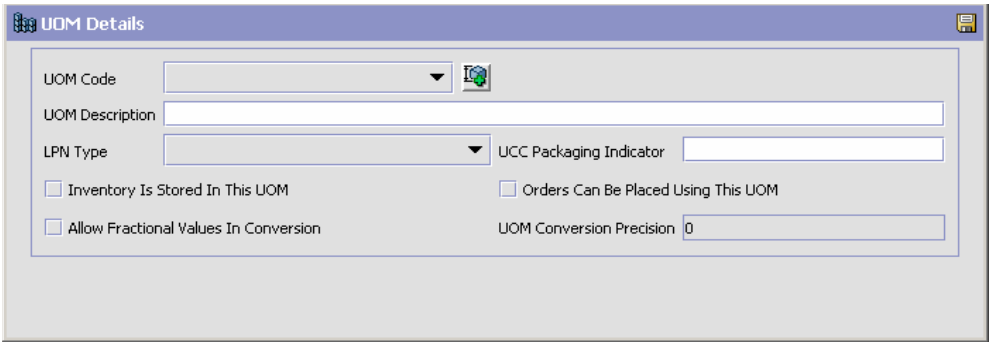
Table 4—24   UOM Details Pop-Up Window

Field	Description
UOM Code	Select the unit of measure.
UOM Description	Enter a brief description of the unit of measure.
LPN Type	If the unit of measure represents a physical case, select Case. If the unit of measure represents a physical pallet, select Pallet.
UCC Packaging Indicator	Enter the UCC case code to be used as a standard for this all items associated with this unit of measure.
Inventory Is Stored In This UOM	Select Inventory Is Stored In This UOM if this unit of measure can be used when defining unique item ID/unit of measure combinations.
Orders Can Be Placed Using This UOM	Select Orders Can Be Placed Using This UOM if this unit of measure can be used when associating alternate ordering units of measure with a particular item ID/unit of measure combination.

Table 4–24   UOM Details Pop-Up Window

Field	Description
Allow Fractional Values in Conversion	Select Allow Fractional Values in Conversion if you want to allow quantities of a fractional value when converting quantity from the inventory unit of measure to the alternate ordering unit of measure.
	Otherwise, it is assumed that the ordering unit of measure is always a positive integer multiple of the inventory unit of measure.
	For example, an item has an inventory unit of measure of EACH and an ordering unit of measure of Case. twelve EACH makes up one case. If you do not allow fractional values for the Case unit of measure you cannot ship ten units of the item and call it a Case.
UOM Conversion Precision	If you selected Allow Fractional Values in Conversion, the number of decimal places you want fractions to be rounded up to. For example, if you enter 2, 1.456 will be rounded up to 1.46.
	If you are configuring a time unit of measure, the time is rounded up to the number of minutes you specify in this field. For example, if you set the conversion precision to 20 for a time unit of measure, something that takes 14 minutes would be rounded to 20 minutes and something that takes 67 minutes would be rounded up to 80 minutes.
	Note: The number is always rounded up to the specified precision.

4.3.1.2 Modifying a Quantity Unit of Measure

To modify a quantity unit of measure:

1. From the tree in the application rules side panel, choose Products > Item UOM Master. The Product Item UOM Master window appears in the work area.

2. Choose the Quantity UOMs tab.

3. Select the applicable unit of measure and choose 🕸. The UOM Details pop-up window is displayed in the work area.

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

5. Choose 💾.

4.3.1.3 Deleting a Quantity Unit of Measure

To delete a quantity unit of measure:

1. From the tree in the application rules side panel, choose Products > Item UOM Master. The Product Item UOM Master window appears in the work area.

2. Choose the Quantity UOMs tab.

3. Select the applicable unit of measure and choose ✖.

4.3.2 Defining Pricing Units of Measure

You can define a master list of pricing units of measure that can be used when a product item's pricing is based on a different unit of measure than it's inventory unit of measure.

For example, you have product item called Apples. Apples are inventoried and sold as a unit of measure called Cases. However, the pricing is determined by the weight of each case. In this scenario, you would assign the product item Apples the inventory unit of measure Cases and the pricing unit of measure Weight.
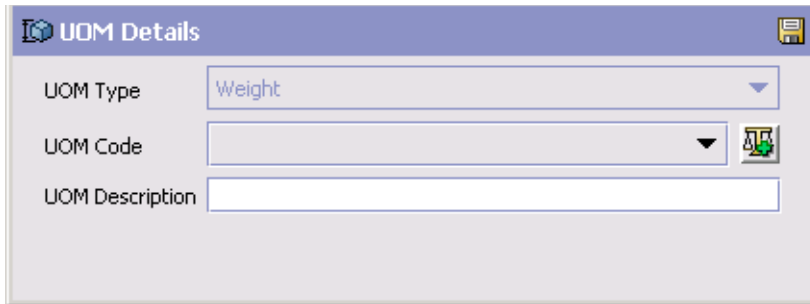
You can use the Pricing UOMs tab for:

- Creating a Pricing Unit of Measure
- Modifying a Pricing Unit of Measure
- Deleting a Pricing Unit of Measure

4.3.2.1 Creating a Pricing Unit of Measure

To create a pricing unit of measure:

1. From the tree in the application rules side panel, choose Products > Item UOM Master. The Product Item UOM Master window appears in the work area.

2. Choose the Pricing UOMs tab.

3. Choose ✚. The UOM Details pop-up window is displayed in the work area.

4. From UOM Type, select the applicable unit of measure type.

5. In UOM Code, select the unit of measure you want to be able to be used for pricing.

6. In UOM Description, enter a brief description of the pricing unit of measure.

7. Choose 🖫.

4.3.2.2 Modifying a Pricing Unit of Measure

To modify a pricing unit of measure:

1. From the tree in the application rules side panel, choose Products > Item UOM Master. The Product Item UOM Master window appears in the work area.

2. Choose the Pricing UOMs tab.

3. Select the applicable unit of measure and choose 🐞. The UOM Details pop-up window is displayed in the work area.

4. In UOM Description, enter a brief description of the pricing unit of measure.

5. Choose 🖫.

4.3.2.3 Deleting a Pricing Unit of Measure

To delete a pricing unit of measure:

1. From the tree in the application rules side panel, choose Products > Item UOM Master. The Product Item UOM Master window appears in the work area.

2. Choose the Pricing UOMs tab.

3. Select the applicable unit of measure and choose ✖.

4.4 Defining Master Catalogs

The master catalog is the exhaustive list of your organization's items. You can have more than one master catalog if your business practices require different groupings for your master list of items.

For example, you are configuring a retail organization that has two distinct products, shoes and shirts. Your business practice requires you to create two separate catalogs for the shoe line and the shirt line. You can set up a master catalog for all of the items that are included in the shoe line and a master catalog for all of the items that are included in the shirt line.
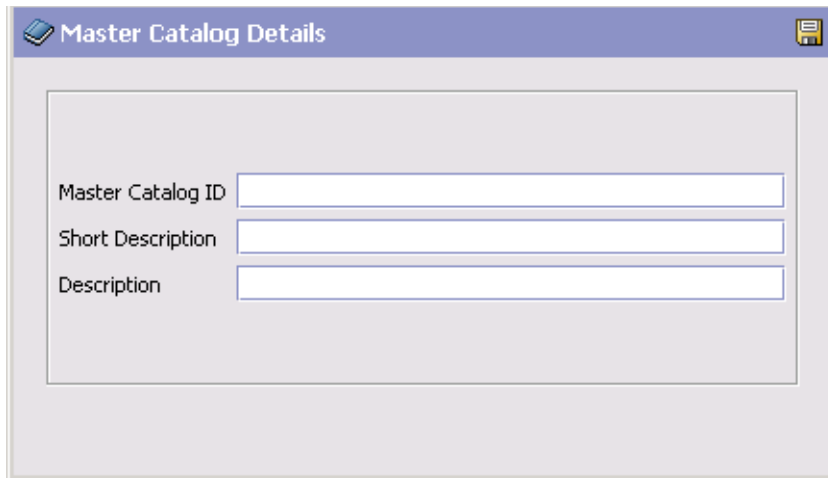
You can use the Master Catalog branch for:

- Creating a Master Catalog

- Modifying a Master Catalog

- Deleting a Master Catalog

4.4.1 Creating a Master Catalog

To create a master catalog:

1. From the tree in the application rules side panel, choose Products > Master Catalog. The Master Catalog Search window appears in the work area.

2. Choose 🗟. The Master Catalog Detail pop-up window appears.

3. Enter information in the applicable fields. Refer to Table 4–25 for field value descriptions.

4. Choose 🖫.

Table 4–25   Master Catalog Detail Pop-Up Window

Field	Description
Master Catalog ID	Enter the master catalog's ID.
Short Description	Enter a brief description of the master catalog.
Description	Enter a more detailed description of the master catalog.

4.4.2 Modifying a Master Catalog

As inventory changes you may periodically need to update or modify your catalog.

To modify a master catalog:

1. From the tree in the application rules side panel, choose Products > Master Catalog. The Master Catalog Search window appears in the work area.

2. Enter applicable search information and choose 🔍. The Master Catalog list is displayed.

3. Select the applicable master catalog and choose 🌐. The Master Catalog Detail pop-up window appears.

   4. Modify information in the applicable fields. Refer to Table 4–25 for field value descriptions.

   5. Choose 💾.

4.4.3 Deleting a Master Catalog

To delete a master catalog:

   1. From the tree in the application rules side panel, choose Products > Master Catalog. The Master Catalog Search window appears in the work area.

   2. Enter applicable search information and choose 🔍. The Master Catalog list is displayed.

   3. Select the applicable master catalog and choose 🗑.

4.5 Defining Categories

Categories provide your catalog with a means to describe the entire item set in a number of different hierarchal and searchable groupings. Each category can contain items from multiple master catalogs, providing a single face to the users for all master catalogs.

The highest level of the category hierarchy is called the category domain. All of the groupings that exist below the category domain are referred to as categories.

For example, you want to set up a grouping using shoes and shirts from both of your master catalogs. You want this grouping to show a breakdown of your items by what season they are sold in. You create a grouping called Seasonal with four groupings underneath called Fall, Winter, Spring, and Summer. In this example, Seasonal is the category domain and Fall, Winter, Spring, and Summer are the categories.

You can use the Categories branch for:

• Defining a Category Hierarchy

• Defining Additional Category Attributes

4.5.1 Defining a Category Hierarchy

You can create a hierarchical list of categories that can be queried on.
You can use the category hierarchy to group product items into logical
sub-sets.

You can use the Category Hierarchy branch for:

- Creating a Category Domain

- Modifying a Category Domain

- Deleting a Category Domain

- Creating a Category

- Modifying a Category

- Deleting a Category

- Adding an Item to a Category

- Removing an Item from a Category

4.5.1.1 Creating a Category Domain

You can create a category domain under which you can classify further
categories.

To create a category domain:

1. From the tree in the application rules side panel, choose Products >
   Categories > Category Hierarchy. The Categories tree appears in the
   work area.

2. Choose ![icon]. The Category Domain pop-up window is displayed.

3. Enter information in the applicable fields. Refer to Table 4–26 for field
   value descriptions.

4. Choose ![icon].
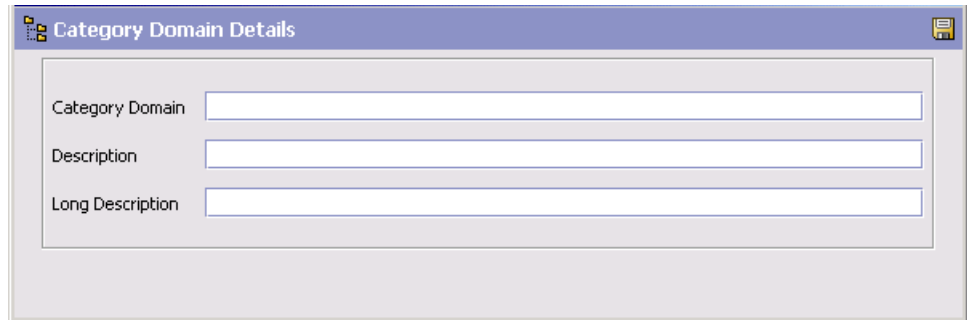
Table 4–26   Category Domain Pop-Up Window

Field	Description
Category Domain	Enter the name of the category domain.
Description	Enter a brief description of the category domain.
Long Description	Enter a more detailed description of the category domain.

4.5.1.2 Modifying a Category Domain

To modify a category domain:

1. From the tree in the application rules side panel, choose Products > Categories > Category Hierarchy. The Categories tree appears in the work area.

2. Select the applicable category domain from the tree in the side pane.

3. Choose ![icon]. The Category Domain pop-up window is displayed.

4. Enter information in the applicable fields. Refer to Table 4–26 for field value descriptions.

5. Choose ![icon].

4.5.1.3 Deleting a Category Domain

To delete a category domain:

1. From the tree in the application rules side panel, choose Products > Categories > Category Hierarchy. The Categories tree appears in the work area.

2. Select the category domain you want to delete from the tree in the side pane.

3. Choose ❌.

> **Note:** You cannot delete a category domain that contains categories. You must first delete all categories under the category domain before you delete it.

4.5.1.4 Creating a Category

You can create additional categories under pre-existing category domains.

To create a category:

1. From the tree in the application rules side panel, choose Products > Categories > Category Hierarchy. The Categories tree appears in the work area.

2. From the Categories tree, select the category domain or category to which you want to add this new category.

3. Choose 📂. The Category Detail window is displayed.

4. Enter information in the applicable fields. Refer to Table 4–27 for field value descriptions.

5. Choose 💾.

Table 4–27   Category Detail Window

Field	Description
Category	Enter the name of the category.
Description	Enter a brief description of the category.
Status	Select Published if the category is currently in use (active). Select Held if the category is not in use (inactive).
	For example, if you are creating a category for winter clothes during a season in which they are not sold you would select Held. When the winter clothes season begins you would select Published to make the category active.

Table 4–27   Category Detail Window

Field	Description
Long Description	Enter a more detailed description of the category.
Item List	A list of all the items included in the category.
Additional Attributes	Any common codes that you may have set up as per your business practices.

4.5.1.5 Modifying a Category

To modify a category:

1. From the tree in the application rules side panel, choose Products > Categories > Category Hierarchy. The Categories tree appears in the work area.
2. Select the category that you want to modify from the Categories tree.
3. Choose ![icon]. The Category Detail pop-up window is displayed.
4. Enter information in the applicable fields. Refer to Table 4–27 for field value descriptions.
5. Choose ![icon].

4.5.1.6 Deleting a Category

To delete a category:

1. From the tree in the application rules side panel, choose Products > Categories > Category Hierarchy. The Categories tree appears in the work area.
2. Select the category that you want to delete from the Categories tree in the side pane.
3. Choose ![icon].

> **Note:** Deleting a category deletes all sub-categories and removes all items from the category and sub-categories. The items are not deleted, but are removed from deleted categories.

4.5.1.7 Adding an Item to a Category

To add an item to a category:

1. From the tree in the application rules side panel, choose Products > Categories > Category Hierarchy. The Categories tree appears in the work area.

2. Select the category that you want to add an item to from the Categories tree.

3. From the menu bar, choose Actions. A drop-down list is displayed.

4. Choose Add Item to Category. The Item Search pop-up window is displayed.

5. Enter applicable search criteria and choose ![icon]. A list of items is displayed.

6. Select the item you want to add and select ![icon]. The item now appears in the categories item list.

4.5.1.8 Removing an Item from a Category

To remove an item from a category:

1. From the tree in the application rules side panel, choose Products > Categories > Category Hierarchy. The Categories tree appears in the work area.

2. Select the category from which you want to remove an item from the Categories tree. The Category Item List is displayed.

3. Select the item you want to remove.

4. From the menu bar, choose Actions. A drop-down list is displayed.

5. Choose Remove Item from Category. A warning dialog box appears.

6. Choose OK.

4.5.2 Defining Additional Category Attributes

Categories provide you with a means to describe the entire item set in a number of different hierarchal and searchable groupings.

You can use the Additional Category Attributes branch for:

• Defining Category Statuses

• Defining Additional Attributes

4.5.2.1 Defining Category Statuses

You can define common codes for category statuses used when setting up a category in Product Management.

The following are Yantra 7x default category statuses:

• 2000 - Held

• 3000 - Published
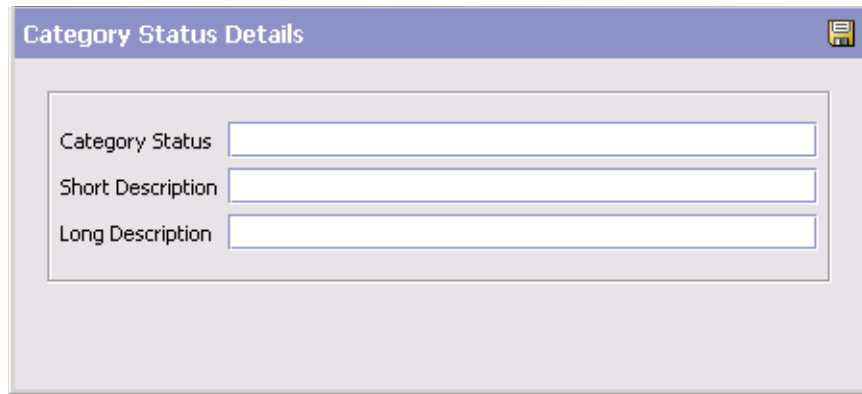
You can use the Category Statuses tab for:

• Creating an Category Status

• Modifying an Category Status

• Deleting an Category Status

4.5.2.1.1 Creating an Category Status

To create an category status:

1. From the tree in the application rules side panel, choose Products > Categories > Additional Category Attributes. The Catalog Categories window appears in the work area.

2. Choose the Category Statuses tab.

3. Choose . The Category Status Details pop-up window is displayed.

Category Status Details 🖫

Category Status [_____]
Short Description [_____]
Long Description [_____]

4. In Category Status, enter the value you want to use for the category status.

5. In Short Description, enter a brief description of the category status.

6. In Long Description, enter a more detailed description of the category status.

7. Choose 🖫.

4.5.2.1.2 Modifying an Category Status
To modify an category status:

1. From the tree in the application rules side panel, choose Products > Categories > Additional Category Attributes. The Catalog Categories window appears in the work area.

2. Choose the Category Statuses tab.

3. Select the applicable category status and choose 🐝. The Category Status Details pop-up window is displayed.

4. In Short Description, enter a brief description of the category status.

5. In Long Description, enter a more detailed description of the category status.

6. Choose 🖫.

4.5.2.1.3 Deleting an Category Status
To delete an category status:

1. From the tree in the application rules side panel, choose Products > Categories > Additional Category Attributes. The Catalog Categories window appears in the work area.

2. Choose the Item Statuses tab.

3. Select the applicable category status and choose .

> **Note:** You cannot delete default category statuses.

4.5.2.2 Defining Additional Attributes

You can define common codes for additional attributes used when setting up a product item. This allows you to store any additional information about your categories that is not captured by defaults in Yantra 7x. These attributes appear as fields in the Category Details screen. You can create, modify, and delete additional attributes.

The following is Yantra 7x default additional attribute:

- DEFAULT
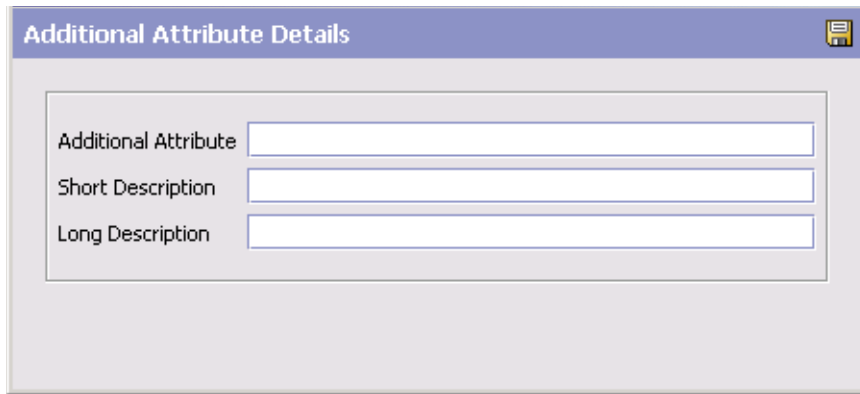
You can use the Additional Attributes tab for:

- Creating an Additional Attribute

- Modifying an Additional Attribute

- Deleting an Additional Attribute

4.5.2.2.1 Creating an Additional Attribute

To create an additional attribute:

1. From the tree in the application rules side panel, choose Products > Categories > Additional Category Attributes. The Catalog Categories window appears in the work area.

2. Choose the Additional Attributes tab.

3. Choose . The Additional Attribute Details pop-up window is displayed.

4. In Additional Attribute, enter the value you want to use for the additional attribute.

> **Important:** Do not put a space or special characters in the Additional Attribute.

5. In Short Description, enter a brief description of the additional attribute.

6. In Long Description, enter a more detailed description of the additional attribute.

7. Choose 🖫.

4.5.2.2.2 Modifying an Additional Attribute
To modify an additional attribute:

1. From the tree in the application rules side panel, choose Products > Categories > Additional Category Attributes. The Catalog Categories window appears in the work area.

2. Choose the Additional Attributes tab.

3. Select the applicable additional attribute and choose 🏵. The Additional Attribute Details pop-up window is displayed.

4. In Short Description, enter a brief description of the additional attribute.

5. In Long Description, enter a more detailed description of the additional attribute.

6. Choose 🖫.

4.5.2.2.3   Deleting an Additional Attribute
To delete an additional attribute:

1. From the tree in the application rules side panel, choose Products > Categories > Additional Category Attributes. The Catalog Categories window appears in the work area.

2. Choose the Additional Attributes tab.

3. Select the applicable additional attribute and choose 🖳.

> **Note:**   You cannot delete the default additional attribute provided by Yantra 7x.

4.6 Defining Classifications

You can define product item classifications and classification hierarchies that can be used within Yantra 7x for actions such as sourcing, associating services, determining shipping preferences, and so on. By defining a classification you identify an item attribute as having a specified use in Yantra 7x.

For example, you have items that contain hazardous materials and items that do not contain hazardous materials in your catalog. You want to source hazardous items out of Node 1 and non-hazardous materials out of Node 2. In this scenario, you can define a product item classification for the Hazardous Materials item attribute to be used for sourcing. You can then configure sourcing rules as needed for the Distributed Order Management application.

You can also define hierarchical item groupings for a classification. These groupings can be used to further refine the items affected by a classification purpose.

For example, you have created a classification called Apparel and associated it with the Product Line item attribute and Sourcing classification purpose. Under this classification you have two lines of clothing, Men's and Women's, each which contain items that are either

classified at shirts or shoes. You want to source men's apparel from Node 1 and women's apparel from Node 2.

In this scenario, you can create a classification hierarchy for the Apparel classification as detailed in the following figure.

Figure 4–1   Classification Hierarchy Example
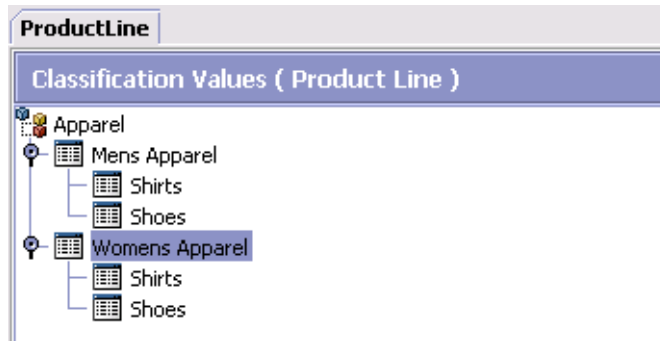
Once the hierarchy is created you can assign items to the applicable levels and configure sourcing rules to source all items associated with Mens Apparel from Node 1 and all items associated with Womens Apparel from Node 2.

A classification level overrides any classification level above it in the hierarchy. For example, continuing from the example above, you decide that you still want to source Mens Apparel from Node 1. However, you want Womens Shoes to also be sourced from Node 1. In this scenario, if you configure the Shoes level underneath Womens Apparel to be sourced from Node 1, but still have the original configuration of all Womens Apparel being sourced from Node 2, the Shoes sourcing rule will override the Womens Apparel sourcing rule.

For more information about configuring sourcing rules, see the *Yantra 7x Distributed Order Management Configuration Guide*.

You can use the Classifications branch for:

*   Defining Classification Definitions

*   Defining Classification Purposes

*   Defining a Classification Hierarchy

4.6.1 Defining Classification Definitions

You can create a classification and associate an item attribute with it. Once a classification is defined, the corresponding field within the Product Item Details screen displays a lookup button from which the classification values you configure can be selected.
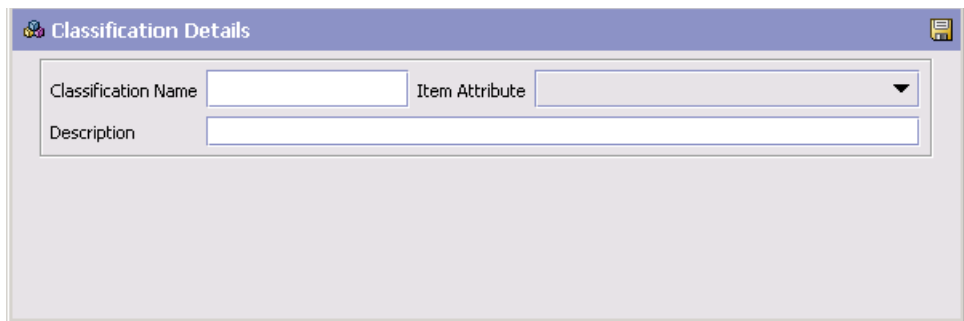
You can use the Classification Definitions tab for:

- Creating a Classification Definition
- Modifying a Classification Definition
- Deleting a Classification Definition

4.6.1.1 Creating a Classification Definition

To create a classification definition:

1. From the tree in the application rules side panel, choose Products > Classifications > Classification Definition. The Classification Definition window appears in the work area.

2. Choose the Classification Definitions tab.

3. Choose . The Classification Details pop-up window is displayed.

4. In Classification Name, enter the name of the classification.

5. From Item Attribute, select the item attribute you want to associate with the classification.

> **Note:** The item attributes in the drop-down may be displayed with underscores or without spacing. Disregard this.

6. In Description, enter a brief description of the classification.

7. Choose 🖫.

4.6.1.2 Modifying a Classification Definition

To modify a classification definition:

1. From the tree in the application rules side panel, choose Products > Classifications > Classification Definition. The Classification Definition window appears in the work area.

2. Choose the Classification Definitions tab.

3. Select the applicable classification definition and choose 🏵. The Classification Details pop-up window is displayed.

4. In Description, enter a brief description of the classification.

5. Choose 🖫.

4.6.1.3 Deleting a Classification Definition

To delete a classification definition:

1. From the tree in the application rules side panel, choose Products > Classifications > Classification Definition. The Classification Definition window appears in the work area.

2. Choose the Classification Definitions tab.

3. Select the applicable classification definition and choose ✖.

4.6.2 Defining Classification Purposes

Once you have created a classification definition, you can determine how you want to use it in the system. Refer to Table 4–28 for the descriptions of default system classification purposes.

Table 4–28   Classification Purposes Definitions

Classification Purpose	Description
Capacity	Choosing 'Capacity' as a Classification Purpose enables one to define the same capacity constraints for a classification of items. For more information on Capacity, refer to *Yantra 7x Warehouse Management System Configuration Guide*.
Procurement	Choosing 'Procurement' as a Classification Purpose enables a classification of items to drive specific procurement rule logic. For more information on Procurement, refer to the *Yantra 7x Distributed Order Management Configuration Guide*.
Sourcing / Sourcing 2 / Sourcing 3	Choosing 'Sourcing' as a Classification Purpose enables a classification of items to drive specific sourcing rule logic. For more information on Sourcing, refer to the *Yantra 7x Distributed Order Management Configuration Guide*.
Container Category	Choosing 'Container Category' as a Classification Purpose enables one to containerize a classification of items in the same way. For more information on Container Category, refer to *Yantra 7x Warehouse Management System Configuration Guide*.
Count Strategy 1 / Count Strategy 2 / Count Strategy 3	Choosing 'Count Strategy' as a Classification Purpose enables one to use the same count strategy for a classification of items. For more information on Count Strategy, refer to *Yantra 7x Warehouse Management System Configuration Guide*.
Location Inventory Monitor 1 / Location Inventory Monitor 2 / Location Inventory Monitor 3	Choosing 'Location Inventory Monitor' as a Classification Purpose enables alerting locations when the inventory reaches specific inventory monitory levels, for a classification of items. For more information on Location Inventory Monitor, refer to *Yantra 7x Warehouse Management System Configuration Guide*.
NMFC	Choosing NMFC as a classification purpose enables one to group items according to the National Motor Freight Classification for accurate classification and pricing of shipments. For more information on NMFC, see Section 4.1.2.6, "Defining a Product Item's Classifications"

Table 4–28   Classification Purposes Definitions

Classification Purpose	Description
Pack Constraints 1 / Pack Constraints 2 / Pack Constraints 3	Choosing 'Pack Constraints' as a Classification Purpose enables one to define mix constraints for a classification of items. For more information on Pack Constraints, refer to *Yantra 7x Warehouse Management System Configuration Guide*.
Productivity	Choosing 'Productivity' as a Classification Purpose enables one to categorize productivity metrics by classification of items. For more information on Productivity, refer to *Yantra 7x Warehouse Management System Configuration Guide*.
Receiving Preference	Choosing 'Receiving Preference' as a Classification Purpose enables one to define the receiving rule for a classification of items. For more information on Receiving Preference, refer to *Yantra 7x Warehouse Management System Configuration Guide*.
Retrieval 1 / Retrieval 2 / Retrieval 3	Choosing 'Retrieval' as a Classification Purpose enables one to define retrieval rules for a classification of items. For more information on Retrieval, refer to *Yantra 7x Warehouse Management System Configuration Guide*.
Routing Guide	Choosing 'Routing Guide' as a Classification Purpose enables one to define routing rules for a classification of items. For more information on Routing Guide, refer to *Yantra 7x Logistics Management Configuration Guide*.
Service Association	Choosing 'Service Association' as a Classification Purpose enables a classification of items to be associated with a set of provided or delivery services. For more information on service associations, refer to the Section 4.6.3.5, "Associating Provided Services and Delivery Services to a Classification Value" on page 133.
Shipping Preference	Choosing 'Shipping Preference' as a Classification Purpose enables one to define shipping rules for a classification of items. For more information on Shipping Preference, refer to *Yantra 7x Supply Collaboration Configuration Guide*.

Table 4–28   Classification Purposes Definitions

Classification Purpose	Description
SKU UNit Size Code	Choosing 'SKU Unit Size Code' as a Classification Purpose enables one to define size codes for items, and hence define carton capacities for items with a specific size code. For more information on SKU Unit Size Code, refer to *Yantra 7x Warehouse Management System Configuration Guide*.
Storage 1 / Storage 2 / Storage 3	Choosing 'Storage' as a Classification Purpose enables driving the putaway of a classification of items. For more information on Storage, refer to *Yantra 7x Warehouse Management System Configuration Guide*.
VAS	Choosing 'VAS' as a Classification Purpose enables driving value added services for a classification of items. For more information on Value Added Services, refer to *Yantra 7x Warehouse Management System Configuration Guide*.

You can use the Classification Purposes tab for:

- Creating a Classification Purpose
- Modifying a Classification Purpose
- Deleting Classification Purposes

4.6.2.1 Creating a Classification Purpose

To create a classification purpose:

1. From the tree in the application rules side panel, choose Products > Classifications > Classification Definition. The Classification Definition window appears in the work area.

2. Choose the Classification Purposes tab.

3. Choose ✚. The Classification Purpose Details pop-up window is displayed.
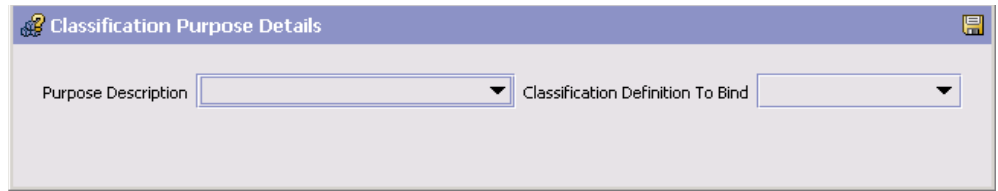
4. From Purpose Description, select the applicable classification purpose.

> **Important:** You cannot assign more than one
> classification definition to a classification purpose.

5. From Classification Definition To Bind, select the classification that
you want to associate the classification purpose with.

6. Choose 🖫.

4.6.2.2 Modifying a Classification Purpose

To modify a classification purpose:

1. From the tree in the application rules side panel, choose Products >
Classifications > Classification Definition. The Classification Definition
window appears in the work area.

2. Choose the Classification Purposes tab.

3. Select the applicable classification purpose and choose 🐾. The
Classification Purpose Details pop-up window is displayed.

4. From Classification Definition To Bind, select the classification that
you want to associate the classification purpose with.

5. Choose 🖫.

4.6.2.3 Deleting Classification Purposes

To delete a classification purpose:

1. From the tree in the application rules side panel, choose Products >
Classifications > Classification Definition. The Classification Definition
window appears in the work area.

2. Choose the Classification Purposes tab.

3. Select the applicable classification purpose and choose ✘.

4.6.3 Defining a Classification Hierarchy

A classification hierarchy contains all of the valid values a given classification can take in a hierarchical format. A classification is always associated to an attribute in the item master. This hierarchy stores all the values that the associated item attribute can take.

You can use the Classification Hierarchy branch for:

• Creating a Classification Value

• Modifying and Adding Items to a Classification Value

• Defining Common Item Attributes for a Classification Value

• Deleting a Classification Value

4.6.3.1 Creating a Classification Value

To create a classification value:

1. From the tree in the application rules side panel, choose Products > Classifications > Classification Hierarchy. The Classification Values window appears in the work area.

2. Choose ✚. The Value Details pop-up window is displayed.

3. In Classification Value, enter the classification value.

> **Note:** In instances where the Classification Definition is associated with the Item Attribute Velocity Code, only valid values (existing velocity codes) must be entered in the Value Details screen.

4. In Description, enter a brief description of the classification value.

> **Note:** The description that you enter for the classification value is the literal that will appear in the classification hierarchy on the user interface. You can have the same description for different classification values, therefore it is possible to have two or more of the same value descriptions on the user interface. If this happens you can discern the classification value the description applies to by performing a mouse-over.

5. In Long Description, enter a more detailed description of the classification value.

6. Choose 🖫.

4.6.3.2 Modifying and Adding Items to a Classification Value

To modify a classification value:

1. From the tree in the application rules side panel, choose Products > Classifications > Classification Hierarchy. The Classification Values window appears in the work area.

2. Select the applicable classification value and choose 🌸. The Value Details pop-up window is displayed.

3. In Description, enter a brief description of the classification value.

4. In Long Description, enter a more detailed description of the classification value.

5. From the Classification Item List, choose 🔍. The Item Search window appears.

6. Enter applicable search criteria and choose 🔍. A list of items is displayed.

7. Select the item you want to associate with this classification.

8. Choose 🖫.

4.6.3.3 Defining Common Item Attributes for a Classification Value

You can define common item attributes for a classification level. Items with this classification level inherit values for these attributes, unless the values for these attributes have been specified at the item level. For

more information on item details, see Section 4.1, "Defining Product Items" on page 45.

> **Note:** To configure common item attributes, you must assign a classification purpose to a classification value. For more information on classification purposes, refer to Section 4.6.2, "Defining Classification Purposes" on page 121.

To define common item attributes for a classification value:

1. From the tree in the application rules side panel, choose Products > Classifications > Classification Hierarchy. The Classification Values window appears in the work area.

2. Select the applicable classification value and choose 🕸. The Value Details pop-up window is displayed. Select the Common Item Attributes Tab.

3. Enter information into the applicable fields. Refer to Table 4–29 for field level descriptions.

4. Choose 💾.

Table 4–29   Value Details, Common Item Attributes Tab

Field	Description
View Icons	
📧	**Extended Attributes** - click this icon to view the Extended Attributes pop-up window. If you have specified additional common item attributes, you can define them for the classification here.
Reverse Logistics	
Returnable	Specify whether this item can be returned.

Table 4–29   Value Details, Common Item Attributes Tab

Field	Description
Return Window Days	Enter the number of days from receipt of the item that the Buyer has to return the item.
Inventory Info	
Default Product Class	Select any of the configured product classes based on your business practices. For more information about product classes, see the *Yantra 7x Platform Configuration Guide*.
ATP Rule	Select an ATP Rule to use. The parameters defined in ATP rules are used to determine the available inventory. For more information about ATP rules, see the *Yantra 7x Inventory Synchronization Configuration Guide*. **Note:** If you do not choose an ATP rule, the system's DEFAULT ATP rule is used.
Lead Days	Enter the amount of time (in days) needed to procure and make available for shipping.
ATP Monitor Rule	Select an Inventory Monitoring Rule to use. The minimum inventory levels are based on the parameters set up for the selected ATP Monitoring Rule. For more information about ATP monitoring rules, see the *Yantra 7x Inventory Synchronization Configuration Guide*.
Track FIFO in Inventory	Indicates that inventory needs to be tracked using the First In First Out (FIFO) number. The FIFO number is automatically generated by the system.
Node Level ATP Monitor Rule	Select an Node Level Inventory Monitoring Rule to use. The minimum inventory levels for this item are based on the parameters set up for the selected ATP Monitoring Rule. For more information about ATP monitoring rules, see the *Yantra 7x Inventory Synchronization Configuration Guide*.
Future Safety Factor Percentage	Enter the percentage of inventory you want to exclude from future inventory availability.
Onhand Safety Factor Percentage	Enter the percentage of inventory you want to exclude from on hand inventory availability. If this option is chosen, you cannot specify an Onhand Safety Factor Quantity.

Table 4–29   Value Details, Common Item Attributes Tab

Field	Description
Onhand Safety Factor Quantity	Enter the quantity of inventory you want to exclude from on hand inventory availability.
	If this option is chosen, you cannot specify an Onhand Safety Factor Percentage.
Sourcing Info	
Release an order for this item __ days before expected time of shipment.	Enter the number of days an order should be released before its expected time of shipment.
Node needs to be notified at least __ hours prior to expected time of shipment.	Enter the minimum number of hours a node needs to be notified before the expected time of shipment.
Pickup Allowed	Specify whether pickup is allowed.
Delivery Allowed	Specify whether delivery is allowed.
Shipping Allowed	Specify whether shipping is allowed.
Don't Perform Inventory Check on Schedule and Release	Specify whether inventory checks should be performed during Schedule and Release.
Forwarding Allowed	Specify whether forwarding is allowed.
Procurement Allowed	Specify whether procurement is allowed.
Transportation Info	
Parcel Shipping Allowed for Transfers	Specify whether parcel shipping is allowed of transfers.
Requires Freezer	Specify whether items require freezer storage during transportation.
Shipping By Air Allowed	Specify whether items can be shipped by air.

4.6.3.4 Deleting a Classification Value

To delete a classification value:

1. From the tree in the application rules side panel, choose Products > Classifications > Classification Hierarchy. The Classification Values window appears in the work area.

2. Select the applicable classification value and choose ✖

4.6.3.5 Associating Provided Services and Delivery Services to a Classification Value

You can associate Services to a classification value.

You can use the Service Skills tab to:

- Associate provided services to a classification value

- Associate delivery services to a classification value

To associate services to a classification value:

1. From the menu bar, choose Applications > Product Management. The Product Management tree is displayed in the side panel.

2. From the Product Management tree, choose Products > Classifications > Classification Hierarchy. The Classification Values window appears in the work area.

3. Choose 🧩 . The Available Services pop-up window is displayed.
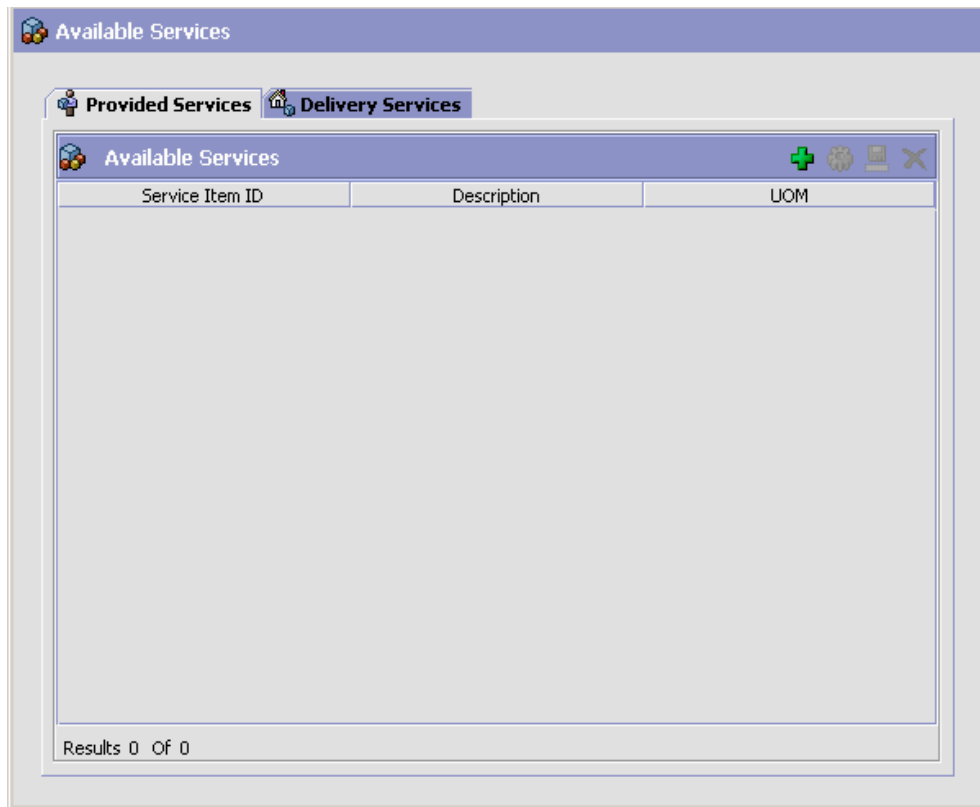
Use the provided services tab for:

- Creating a Provided Service Association
- Modifying a Provided Service Association
- Deleting a Provided Service Association
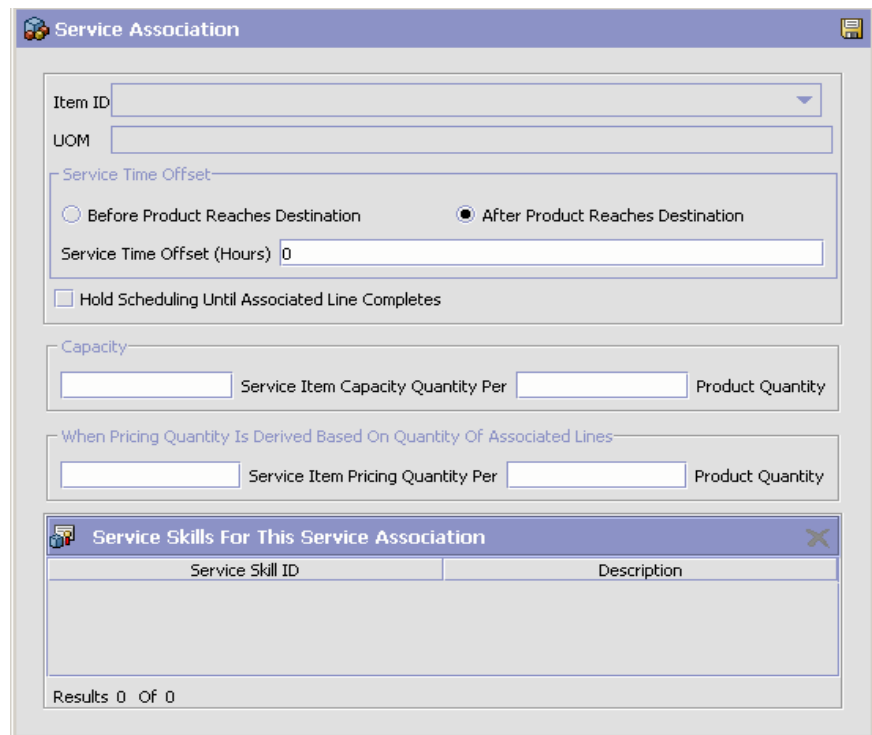
Use the delivery services tab for:

- Creating a Delivery Service Association
- Modifying a Delivery Service Association
- Deleting a Delivery Service Association

4.6.3.5.1   Creating a Provided Service Association

To create a provided service association:

1. From the menu bar, choose Applications > Product Management. The Product Management tree is displayed in the side panel.

2. From the Product Management tree, choose Products > Classifications > Classification Hierarchy. The Classification Values window appears in the work area.

3. Choose 🧊 . The Available Services pop-up window is displayed. Select the Provided services tab.

4. Choose ➕. The Service Association Details pop-up window is displayed.

5. Enter information in the applicable fields. See Table 4–12, "Service Association Pop-Up Window" for field value descriptions.

6. Choose 💾.

4.6.3.5.2 Modifying a Provided Service Association

To modify a provided service association:

1. From the menu bar, choose Applications > Product Management. The Product Management tree is displayed in the side panel.

2. From the Product Management tree, choose Products > Classifications > Classification Hierarchy. The Classification Values window appears in the work area.

3. Choose 🧩 . The Available Services pop-up window is displayed. Select the Provided services tab.

4. Choose 🌼. The Service Association Details pop-up window is displayed.

5. Enter information in the applicable fields. See Table 4–12, "Service Association Pop-Up Window" for field value descriptions.

6. Choose 💾.

4.6.3.5.3 Deleting a Provided Service Association

To delete a provided service association:

1. From the menu bar, choose Applications > Product Management. The Product Management tree is displayed in the side panel.

2. From the Product Management tree, choose Products > Classifications > Classification Hierarchy. The Classification Values window appears in the work area.

3. Choose 🧩 . The Available Services pop-up window is displayed.

4. Select the Provided services tab.

5. Select the applicable provided service association and choose ✖.

4.6.3.5.4 Creating a Delivery Service Association

To create a delivery service association:

1. From the menu bar, choose Applications > Product Management. The Product Management tree is displayed in the side panel.

2. From the Product Management tree, choose Products > Classifications > Classification Hierarchy. The Classification Values window appears in the work area.

3. Choose ![icon] . The Available Services pop-up window is displayed. Select the Delivery services tab.

4. Choose ![icon]. The Service Association Details pop-up window is displayed.

5. Enter information in the applicable fields. See Table 4–12, "Service Association Pop-Up Window" for field value descriptions.

6. Choose ![icon].

4.6.3.5.5 Modifying a Delivery Service Association

To modify a delivery service association:

1. From the menu bar, choose Applications > Product Management. The Product Management tree is displayed in the side panel.

2. From the Product Management tree, choose Products > Classifications > Classification Hierarchy. The Classification Values window appears in the work area.

3. Choose ![icon] . The Available Services pop-up window is displayed. Select the Delivery services tab.

4. Choose ![icon]. The Service Association Details pop-up window is displayed.

5. Enter information in the applicable fields. See Table 4–12, "Service Association Pop-Up Window" for field value descriptions.

6. Choose ![icon].

4.6.3.5.6 Deleting a Delivery Service Association

To delete a delivery service association:

1. From the menu bar, choose Applications > Product Management. The Product Management tree is displayed in the side panel.

2. From the Product Management tree, choose Products > Classifications > Classification Hierarchy. The Classification Values window appears in the work area.

3. Choose ![icon] . The Available Services pop-up window is displayed. Select the Delivery services tab.

4. Select the applicable delivery service association and choose ![icon].

4.7 Defining Item Attributes

You can define additional attributes that can be used when configuring a product item.

You can use the Item Attributes branch for:

- Defining Alias Types

- Defining Association Types

- Defining Item Exclusion Codes

4.7.1 Defining Alias Types

You can define common codes for alias types used when configuring a product item. Aliases appear as fields in the item details screen.

The following is Yantra 7x default alias type:

- UPC Code
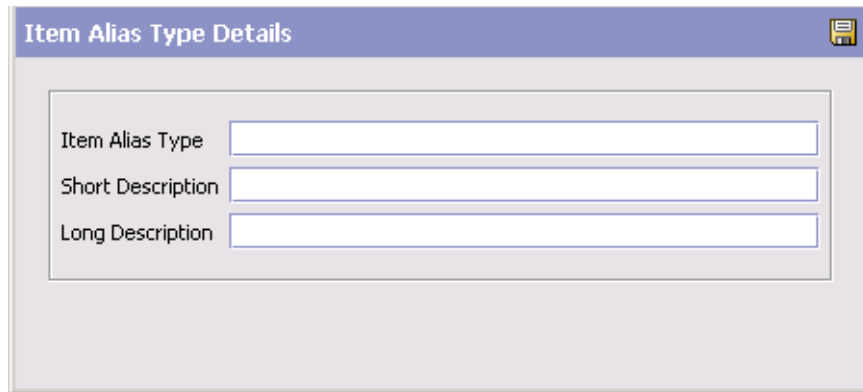
You can use the Alias Types branch for:

- Creating an Alias Type

- Modifying an Alias Type

- Deleting an Alias Type

4.7.1.1 Creating an Alias Type

To create an alias type:

1. From the tree in the application rules side panel, choose Products > Item Attributes > Alias Types. The Item Aliases window appears in the work area.

2. Choose ➕. The Alias Type Details pop-up window is displayed.

3. In Alias Type, enter the value you want to use for the alias type.

> **Important:** Do not put a space or special characters in
> the Alias Type.

4. In Short Description, enter a brief description of the alias type.

5. In Long Description, enter a more detailed description of the alias
type.

6. Choose 💾.

4.7.1.2 Modifying an Alias Type

To modify an alias type:

1. From the tree in the application rules side panel, choose Products >
Item Attributes > Alias Types. The Item Aliases window appears in
the work area.

2. Select the applicable alias type and choose 🐾. The Alias Type Details
pop-up window is displayed.

3. In Short Description, enter a brief description of the alias type.

4. In Long Description, enter a more detailed description of the alias
type.

5. Choose 💾.

4.7.1.3 Deleting an Alias Type

To delete an alias type:

1. From the tree in the application rules side panel, choose Products > Item Attributes > Alias Types. The Item Aliases window appears in the work area.

2. Select the applicable alias type and choose ✖.

> **Note:** You cannot delete default alias types.
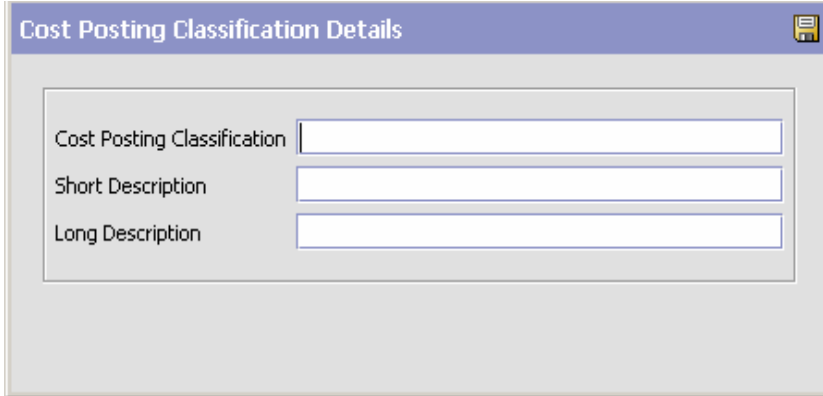
4.7.2 Item Cost Posting Classification

You can group items into appropriate financial ledger groups by creating iCost Posting Classifications when setting up an item in Product Management. When Yantra 7x integrates with financial applications, the translation of a transaction from Yantra 7x into a series of financial postings and the classification value for the item in the transaction is carried into the financial application's interface.

4.7.2.1 Creating an Item's Cost Posting Classification

To create an item's cost posting classification:

1. From the tree in the application rules side panel, choose Products > Item Attributes > Cost Posting Classifications. The Cost Posting Classifications Types window appears in the work area.

2. Choose 🐾. The Cost Posting Classification Details pop-up window is displayed.

3. In Cost Posting Classification, enter the value you want to use for the item's financial ledger group classification.

4. In Short Description, enter a brief description of the cost posting classification.

5. In Long Description, enter a more detailed description of the cost posting classification.

6. Choose 💾.

4.7.2.2 Modifying an Item's Cost Posting Classification

To modify an item's cost posting classification:

1. From the tree in the application rules side panel, choose Products > Item Attributes > Cost Posting Classifications. The Cost Posting Classifications window appears in the work area.

2. Select the applicable cost posting classification and choose 🎲. The Cost Posting Classification Details pop-up window is displayed.

3. In Short Description, enter a brief description of the cost posting classification.

4. In Long Description, enter a more detailed description of the cost posting classification.

5. Choose 💾.

4.7.2.3 Deleting an Item's Cost Posting Classification

To delete an item's cost posting classification:

1. From the tree in the application rules side panel, choose Products > Item Attributes > Cost Posting Classifications. The Cost Posting Classifications window appears in the work area.

2. Select the applicable cost po sting classification and choose .

4.7.3 Defining Association Types

You can define common codes for association types used when configuring a product item.

The following are Yantra 7x default association types:

- CrossSell

- Substitutions

- UpSell
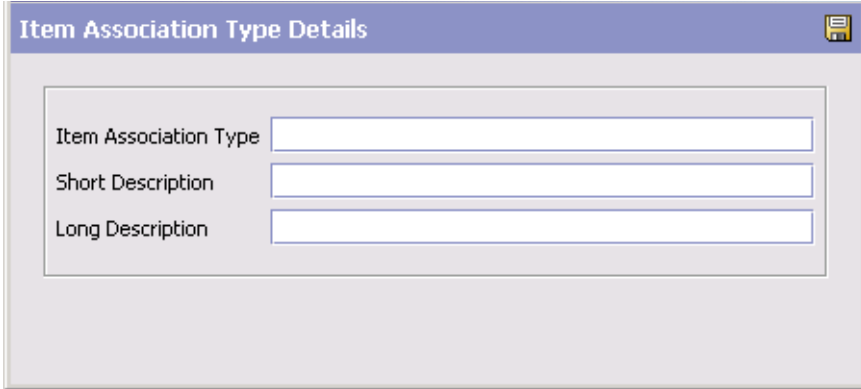
You can use the Association Types branch for:

- Creating an Association Type

- Modifying an Association Type

- Deleting an Association Type

4.7.3.1 Creating an Association Type

To create an association type:

1. From the tree in the application rules side panel, choose Products > Item Attributes > Association Types. The Item Association Types window appears in the work area.

2. Choose . The Association Type Details pop-up window is displayed.

3. In Association Type, enter the value you want to use for the association type.

> **Important:** Do not put a space or special characters in the Association Type.

4. In Short Description, enter a brief description of the association type.

5. In Long Description, enter a more detailed description of the association type.

6. Choose 💾.

4.7.3.2 Modifying an Association Type

To modify an association type:

1. From the tree in the application rules side panel, choose Products > Item Attributes > Association Types. The Item Association Types window appears in the work area.

2. Select the applicable association type and choose 🐞. The Association Type Details pop-up window is displayed.

3. In Short Description, enter a brief description of the association type.

4. In Long Description, enter a more detailed description of the association type.

5. Choose 💾.

4.7.3.3 Deleting an Association Type

To delete an association type:

1. From the tree in the application rules side panel, choose Products > Item Attributes > Association Types. The Item Association Types window appears in the work area.

2. Select the applicable association type and choose ![icon].

> **Note:** You cannot delete default association types.

4.7.4 Defining Item Exclusion Codes

You can define common codes for item exclusion codes used when configuring a product item. An item exclusion code may be set up if your business practices involve the regulation of item shipments for certain countries. For example, if there are certain countries that you ship to that do not allow items with certain hazardous materials to be shipped to them, you may create an item exclusion code that you can associate with any of your items that may contain the certain hazardous material.

> **Note:** Yantra 7x does not by default provide logic to handle item exclusion codes. This functionality is provided to enable integration of Yantra 7x with external systems that can handle item exclusion codes.

The following is Yantra 7x default item exclusion code:

• DEFAULT
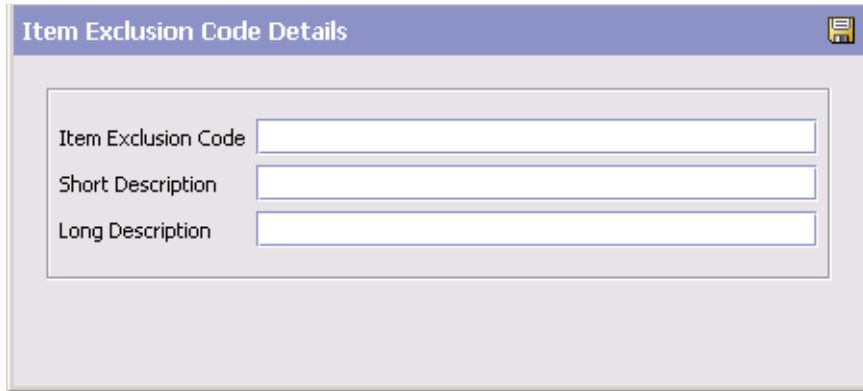
You can use the Item Exclusion Codes branch for:

• Creating an Item Exclusion Code

• Modifying an Item Exclusion Code

• Deleting an Item Exclusion Code

4.7.4.1 Creating an Item Exclusion Code

To create an item exclusion code:

1. From the tree in the application rules side panel, choose Products > Item Attributes > Item Exclusion Codes. The Item Exclusion Codes window appears in the work area.

2. Choose ➕. The Item Exclusion Code Details pop-up window is displayed.

3. In Item Exclusion Code, enter the value you want to use for the item exclusion code.

4. In Short Description, enter a brief description of the item exclusion code.

5. In Long Description, enter a more detailed description of the item exclusion code.

6. Choose 💾.

4.7.4.2 Modifying an Item Exclusion Code

To modify an item exclusion code:

1. From the tree in the application rules side panel, choose Products > Item Attributes > Item Exclusion Codes. The Item Exclusion Codes window appears in the work area.

2. Select the applicable item exclusion code and choose 🔧. The Item Exclusion Code Details pop-up window is displayed.

3. In Short Description, enter a brief description of the item exclusion code.

4. In Long Description, enter a more detailed description of the item exclusion code.

5. Choose ⊟.

4.7.4.3 Deleting an Item Exclusion Code

To delete an item exclusion code:

1. From the tree in the application rules side panel, choose Products > Item Attributes > Item Exclusion Codes. The Item Exclusion Codes window appears in the work area.

2. Select the applicable item exclusion code and choose ✖.

> **Note:** You cannot delete default item exclusion codes.

5

Configuring Delivery Services

A delivery service is a service item that is used for last mile delivery associations with product items. Last mile delivery differs from order shipping in that specific product item deliveries are made using a carrier with defined capacity constraints. Delivery services are typically used for product items that are:

- Heavy, oversized, or fragile and cannot be transported by common carriers

- Require special handling which requires special equipment and/or personnel

Projection TVs and washing machines are examples of two product items that you might want to associate with a delivery service.

A delivery item is uniquely defined by its item ID and unit of measure. You can configure capacity to be maintained for delivery items as well as sourcing rules. For more information about configuring delivery service item capacity rules, see the *Yantra 7x Inventory Synchronization Configuration Guide*. For more information about configuring delivery service item sourcing rules, see the *Yantra 7x Distributed Order Management Configuration Guide*.

You can use the Delivery Services branch for:

- Defining Delivery Service Items

- Defining Delivery Service Options

- Defining Delivery Service Master Units of Measure

- Defining Service Types

5.1 Defining Delivery Service Items

Delivery Services is used to create delivery service items that can be used in Yantra 7x, as well as defining their unique attributes.

You can use the Delivery Service Items branch for:

- Creating a Delivery Service Item
- Deleting a Delivery Service Item

5.1.1 Creating a Delivery Service Item

To create a delivery service item:

1. From the tree in the application rules side panel, choose Delivery Services > Delivery Service Items. The Delivery Service Item Search window appears in the work area.

2. Choose ![icon]. The Create Service Item pop-up window is displayed.

Table 5–1   Create Service Item Pop-up Window

Field	Description
Item ID	Enter the Item ID.
UOM	Select a unit of measure.
Short Description	Enter a short description.
Service Type	Select a service type. Refer to Section 5.4.1, "Defining Delivery Service Types" for more information.
Capacity UOM	Select a capacity UOM.

3. Enter information in the applicable fields. Refer to Table 5–1 for more information.

4. Choose 💾. The Delivery Service Details window is displayed in the work area.

You can use the Delivery Service Details window for:

• Defining a Delivery Service's Primary Information

• Adding Service Options to a Delivery Service Item

• Defining a Delivery Service Item's Instructions

5.1.1.1 Defining a Delivery Service's Primary Information

To define a delivery service's primary information:

1. In the Delivery Service Details window, choose the Primary Info tab.

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

3. Choose 💾.

Table 5–2   Primary Info Tab

Field	Description
Short Description	Enter a brief description of the delivery service item.
Description	Enter a more detailed description of the delivery service item.
Status	Select Held to make the item unavailable. Such items are not processed by Yantra 7x APIs. Choose Published to make the item available to the APIs.

Table 5–2   Primary Info Tab

Field	Description
Return Service	Select Return Service if the delivery service can be used to handle return orders.
Ordered Quantity	
Specified on the Order Line	Select this option if you want to specify the ordered quantity on the order line.
One for Each Associated Product Line Quantity	Select this option if you want to specify one ordered quantity of a service item for each ordered quantity of a product item.
Capacity	
Service Type	Select a service type. Refer to Section 5.4.1, "Defining Delivery Service Types" for more information.
Capacity UOM	Select the capacity unit of measure you want to associate with this delivery service.
Fixed Capacity Units	Enter the amount of capacity that is consumed by the delivery service based on its unit of measure. For example, if the unit of measure for this delivery service is Truck and it takes an entire truck to fulfill a delivery, you would enter 1.
Based on Ordered Service Quantity	Select this option if you want to specify the additional variable capacity based on the ordered quantity.
Based on Associated Product Line Quantity	Select this option if you want to specify the additional variable capacity based on the associated product line quantity.
Capacity Requested per unit of ordered quantity	Specify the amount of capacity requested for each unit of ordered quantity
Extended Description	You can enter a detailed description about the delivery service item including any notes or handling instructions.
	Choose the Localize button to enter description in the multiple languages of the locales you may have configured.
	Note: All locale configuration should be completed before attempting to enter an extended item description. For more information about configuring locales, see the *Yantra 7x Platform Configuration Guide*.

5.1.1.2 Adding Service Options to a Delivery Service Item

You can associate additional delivery service options with a delivery service item. These options can add additional capacity requirements and cost to the delivery service you associate it with.

For example, you have configured a 2-Man Deliver and Hookup delivery service item that you use when delivering projection TVs. You can also associate two delivery options with the delivery service item called, Remove Trash and Haul Away. With these options a customer can decide if they want the delivery men to remove the trash left behind from the projection TV box, as well as whether they want the delivery men to haul off their old TV.

For more information about creating delivery service options, see Section 5.2, "Defining Delivery Service Options" on page 155.

To add a service option to a delivery service item:

1. In the Delivery Service Details window, choose the Options tab.

2. Choose 🟢. The Service Options Item Search pop-up window appears.

3. Enter applicable search criteria and choose 🔍. A list of service options is displayed.

4. Select the service options you want to add to the delivery service item and choose 📦.

5. Choose 💾.

5.1.1.3 Defining Service Skills for a Delivery Service Item

The Service Skills screen is provided for managing service skills for the delivery service you associate it with. For more information about creating Service Skills, see Section 3.5, "Defining Service Skills" on page 39.

You can use the Service Skills tab for:

- Adding Service Skills to a Delivery Service Item
- Removing Service Skills from a Delivery Service Item

5.1.1.3.1 Adding Service Skills to a Delivery Service Item

You can associate service skills with a delivery service item. For example, you have configured a Delivery service item that you use when delivering TVs.

To add a service skill to a delivery service item:

1. In the Delivery Service Details window, choose the Service Skills tab.

2. Choose ✚ from the "Service Skills For This Item" table. The Service Skills List pop-up window appears.

3. Select the service skills you want to add to the delivery service item and choose 💾.

5.1.1.3.2 Removing Service Skills from a Delivery Service Item
To remove a service skill from a delivery service item, in the Service Skills tab, select the applicable service skill from the "Service Skills For This Item" table and choose ✗.

5.1.1.4 Defining a Delivery Service Item's Instructions
You can define any special instructions that pertain to a delivery service item.

You can use the Item Instructions tab for:

- Adding a Delivery Service Item Instruction

- Modifying a Delivery Service Item Instruction

- Deleting a Delivery Service Item Instruction

5.1.1.4.1 Adding a Delivery Service Item Instruction

To add a delivery service item instruction:

1. In the Delivery Service Details window, choose the Item Instructions tab.

2. From the Item Instructions table, choose 📦. The Item Instruction Details pop-up window appears.

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

4. Choose 💾.

Table 5–3   Item Instruction Details Pop-Up Window

Field	Description
Item Instruction Type	Select the item instruction type.
Sequence No	If there are multiple, sequential instructions for the product item, enter the sequence of the instruction you are adding.
Use Item Instruction Code	Choose Use Item Instruction Code if you want to use a pre-existing item instruction code.
Item Instruction Code	If you chose Use Item Instruction Code, select the applicable item instruction code.
Create New Item Instruction	Select Create New Item Instruction if no pre-existing item instruction code exists and you want to create a free-form text instruction.
Text	If you selected Create New Item Instruction, enter the instruction.

5.1.1.4.2   Modifying a Delivery Service Item Instruction

To modify a delivery service item instruction:

1. In the Delivery Service Details window, choose the Item Instructions tab.

2. From the Item Instructions table, select the applicable item instruction choose . The Item Instruction Details pop-up window appears.

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

4. Choose .

5.1.1.4.3   Deleting a Delivery Service Item Instruction

To delete a delivery service item instruction:

1. In the Delivery Service Details window, choose the Item Instructions tab.

2. From the Item Instructions table, select the applicable item instruction choose .

5.1.2 Deleting a Delivery Service Item

To delete a delivery service item:

1. From the tree in the application rules side panel, choose Delivery Services > Delivery Service Items. The Delivery Service Item Search window appears in the work area.

2. Enter applicable search criteria and choose . A list of delivery service items is displayed.

3. Select the applicable delivery service item and choose .

5.2 Defining Delivery Service Options

You can define additional options that can be added to a delivery service. These options can add additional capacity requirements and cost to the delivery service you associate it with.

> **Note:** Delivery service options can be associated with more than one delivery service item.

For example, you have configured a 2-Man Deliver and Hookup delivery service item that you use when delivering projection TVs. You can also create two delivery options to associate with the delivery service item called, Remove Trash and Haul Away. With these options a customer can decide if they want the delivery men to remove the trash left behind from the projection TV box, as well as whether they want the delivery men to haul off their old TV.

For more information about associating a delivery service option with a delivery service item, see Section 5.1.1.2, "Adding Service Options to a Delivery Service Item" on page 152.

You can use the Delivery Service Options branch for:

- Creating a Delivery Service Option
- Modifying a Delivery Service Option
- Deleting a Delivery Service Option

5.2.1 Creating a Delivery Service Option

To create a delivery service option:

1. From the tree in the application rules side panel, choose Delivery Services > Delivery Service Options. The Delivery Service Option Search window appears in the work area.

2. Choose ✚. The Option Details pop-up window is displayed.

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

4. Choose 🖫.

Table 5–4   Option Details Pop-Up Window

Field	Description
Item ID	Enter the delivery service option item ID.
UOM	Select the unit of measure to associate with the delivery service option. **Important:** You can only associate a delivery service option with a delivery service item that has the same unit of measure.
Short Description	Enter a brief description of the delivery service option.
Fixed Capacity Units	Enter the amount of capacity that is consumed by the delivery service based on its unit of measure. For example, if the unit of measure for this delivery service option is Hours and it takes one hour to perform fulfill the option, you would enter 1.
Description	Enter a detailed description of the delivery service option.

5.2.2 Modifying a Delivery Service Option

To modify a delivery service option:

1. From the tree in the application rules side panel, choose Delivery Services > Delivery Service Options. The Delivery Service Option Search window appears in the work area.

2. Enter applicable search criteria and choose 🔍. A list of delivery service options is displayed.

3. Select the applicable delivery service option and choose ⚙️. The Option Details pop-up window is displayed.

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

5. Choose 💾.

5.2.3 Deleting a Delivery Service Option

To delete a delivery service option:

1. From the tree in the application rules side panel, choose Delivery Services > Delivery Service Options. The Delivery Service Option Search window appears in the work area.

2. Enter applicable search criteria and choose 🔍. A list of delivery service options is displayed.

3. Select the applicable delivery service option and choose ✖️.

5.3 Defining Delivery Service Master Units of Measure

You can define a master list of capacity and pricing units of measure to be used when creating a delivery service item.
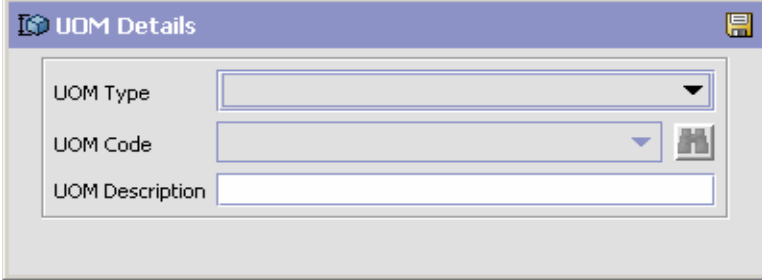
You can use the Delivery Service UOM Master branch for:

- Creating a Master Unit of Measure

- Modifying a Master Unit of Measure

- Deleting a Master Unit of Measure

5.3.1 Creating a Master Unit of Measure

To create a master unit of measure:

1. From the tree in the application rules side panel, choose Delivery Services > Delivery Service UOM Master. The Delivery Services Units of Measure window appears in the work area.

2. Choose ➕. The UOM Details pop-up window is displayed.

3. From UOM Type, select the applicable unit of measure type.

4. In UOM Code, select the unit of measure you want to be able to be used for delivery services.

5. In UOM Description, enter a brief description of the delivery service unit of measure.

6. Choose 💾.

5.3.2 Modifying a Master Unit of Measure

To modify a master unit of measure:

1. From the tree in the application rules side panel, choose Delivery Services > Delivery Service UOM Master. The Delivery Services Units of Measure window appears in the work area.

2. Select the applicable unit of measure and choose 🌼. The UOM Details pop-up window is displayed.

3. In UOM Description, enter a brief description of the delivery service unit of measure.

4. Choose 💾.

5.3.3 Deleting a Master Unit of Measure

To delete a master unit of measure:

1. From the tree in the application rules side panel, choose Delivery Services > Delivery Service UOM Master. The Delivery Services Units of Measure window appears in the work area.

2. Select the applicable unit of measure and choose ✖.

5.4 Defining Service Types

You can use the service types branch for:

- Defining Delivery Service Types

- Defining Additional Capacity

5.4.1 Defining Delivery Service Types

You can define service types to be used when creating a delivery service item.

You can use the Service Type branch for:

- Creating a Delivery Service Type

- Modifying a Delivery Service Type

- Deleting a Delivery Service Type

5.4.1.1 Creating a Delivery Service Type

To create a delivery service type:

1. From the Product Management tree in the application rules side panel, choose Delivery Services > Service Type > Delivery Service Types. The Delivery Service Types window appears in the work area.

2. Choose ➕. The Service Type Details pop-up window is displayed.

Table 5–5   Service Type Details Pop-up Window

Field	Descriptions
Service Type ID	Enter a unique identifier for the service type.
	The Service Type ID must be unique across delivery and provided services.
Description	Enter a description of the service type.
Service Complexity Level	Select a service complexity level.
	Note: Service Complexity Level is mandatory when defining a Service Type. Refer to Section 3.6, "Defining Service Complexity Levels" for more information.
Capacity UOM	Select a capacity UOM.
Service Item ID For Serviced Area Search	If you are planning on using the Serviced Area Search feature in the Yantra 7x Application Consoles, select a service item identifier from the drop-down list that is representative of typical delivery services.
Service Item UOM For Service Area Search	If you are planning on using the Serviced Area Search feature in the Yantra 7x Application Consoles, select a service item unit of measure from the drop-down list that is representative of typical delivery services.

3. Enter information in the applicable fields. Refer to Table 5–5 for more information.

4. Choose 🖫.

5.4.1.2 Modifying a Delivery Service Type

To modify a delivery service type:

1. From the Product Management tree in the application rules side panel, choose Delivery Services > Service Type > Delivery Service Types. The Delivery Service Types window appears in the work area.

2. Select the applicable service type and choose ⚙. The Service Type Details pop-up window is displayed.

3. Edit information in the applicable fields. Refer to Table 5–5 for more information.

4. Choose 💾.

5.4.1.3 Deleting a Delivery Service Type

To delete a delivery service type:

1. From the Product Management tree in the application rules side panel, choose Delivery Services > Service Type > Delivery Service Types. The Delivery Service Types window appears in the work area.

2. Select the applicable service type and choose ✖.

5.4.2 Defining Additional Capacity

Additional capacity can be defined for a given service type and region level combination. For example, deliveries may take longer in the suburb than in the city, therefore you may want to always add a certain amount of time per delivery for a certain region, for a certain service type. Yantra 7x allows you to do this, through the Additional Capacity window.

You can use the Additional Capacity branch for:

• Creating Additional Capacity

• Modifying Additional Capacity

• Deleting Additional Capacity

5.4.2.1 Creating Additional Capacity

To create additional capacity:

1. From the Product Management tree in the application rules side panel, choose Delivery Services > Service Type > Additional Capacity. The Additional Capacity window appears in the work area.

Table 5–6   Additional Capacity Window

Field	Description
Region Schema Used To Apply The Additional Capacity	From the drop-down list, select the region schema to which the additional capacity will be applied.
Additional Capacity	
Service Type	From the drop-down list, select the service type for which you want to add additional capacity.
Region Level	From the drop-down list, select the region level for which you want to add the selected service type.
Additional Capacity	Double-click this field and enter the amount of extra capacity to add for the selected service type and region level.
UOM	The unit of measure associated with the selected service type. This field is automatically populated, and read-only.

2. Enter the information in the applicable fields. Refer to Table 5–6 for field level description.

3. Click 🖫.

5.4.2.2 Modifying Additional Capacity

To modify additional capacity:

1. From the Product Management tree in the application rules side panel, choose Delivery Services > Service Type > Additional Capacity. The Additional Capacity window appears in the work area.

2. Enter the information in the applicable fields. Refer to Table 5–6 for field level description.

3. Click 🖫.

5.4.2.3 Deleting Additional Capacity

To delete additional capacity:

1. From the Product Management tree in the application rules side panel, choose Delivery Services > Service Type > Additional Capacity. The Additional Capacity window appears in the work area.

2. Right click on the row that that you want to remove from the additional capacity table and click Delete.

3. Click 🖫.

6

Configuring Provided Services

A provided service is any additional action that can be provided in an order that does not represent a physical product item. For example, you may have a Washing Machine product item in your catalog that you want to provide installation for. In this scenario, you can create an Installation provided service that can be offered when a customer orders the washing machine.

> **Note:** Provided services do not have to be associated with a product item. You can configure a provided service to stand alone as its own service item.

A provided service item is uniquely defined by its item ID and unit of measure. You can configure capacity to be maintained for provided service items as well as sourcing rules. For more information about configuring provided service item capacity rules, see the *Yantra 7x Inventory Synchronization Configuration Guide*. For more information about configuring provided service item sourcing rules, see the *Yantra 7x Distributed Order Management Configuration Guide*.

You can use the Provided Services branch for:

* Defining Provided Service Items

* Defining Provided Service Options

* Defining Provided Service Master Units of Measure

* Defining Provided Service Types

6.1 Defining Provided Service Items

Provided Service Items is used to create provided service items that can be used in Yantra 7x, as well as defining their unique attributes.

You can use the Provided Service Items branch for:

- Creating a Provided Service Item
- Deleting a Provided Service Item

6.1.1 Creating a Provided Service Item

To create a provided service item:

1. From the tree in the application rules side panel, choose Provided Services > Provided Service Items. The Provided Service Item Search window appears in the work area.

2. Choose 🔩. The Create Service Item pop-up window is displayed.

Table 6–1   Create Service Item Pop-up Window

Field	Description
Item ID	Enter the Item ID.
UOM	Select a unit of measure.
Short Description	Enter a short description.
Service Type	Select a service type. Refer to Section 6.4, "Defining Provided Service Types" for more information.
Capacity UOM	Select a capacity UOM.

3. Enter information in the applicable fields. Refer to Table 6–1 for more information.

4. Choose ⊟. The Provided Service Details window is displayed in the work area.

You can use the Provided Service Details window for:

- Defining a Provided Service's Primary Information
- Adding Service Options to a Provided Service Item
- Defining a Provided Service Item's Instructions

6.1.1.1 Defining a Provided Service's Primary Information

To define a provided service's primary information:

1. In the Provided Service Details window, choose the Primary Info tab.

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

3. Choose ⊟.

Table 6–2   Primary Info Tab

Field	Description
Short Description	Enter a brief description of the provided service item.
Description	Enter a more detailed description of the provided service item.
Status	Select Held to make the item unavailable. Such items are not processed by Yantra's APIs. Choose Published to make the item available to the APIs.
Ordered Quantity	
Specified on the Order Line	Select this option if you want to specify the ordered quantity on the order line.

Table 6–2   Primary Info Tab

Field	Description
One for Each Associated Product Line Quantity	Select this option if you want to specify one ordered quantity of a service item for each ordered quantity of a product item.
Capacity	
Service Type	Select a service type. Refer to Section 6.4, "Defining Provided Service Types" for more information.
Capacity UOM	Select the capacity unit of measure you want to associate with this provided service.
Fixed Capacity Units	Enter the amount of capacity that is consumed by the provided service based on its unit of measure. For example, if the unit of measure for this provided service is Hours and it takes two hours to fulfill the provided service, you would enter 2.
Based on Ordered Service Quantity	Select this option if you want to specify the additional variable capacity based on the ordered quantity.
Based on Associated Procuct Line Quantity	Select this option if you want to specify the additional variable capacity based on the associated product line quantity.
Capacity Requested per unit of ordered quantity	Specify the amount of capacity requested for each unit of ordered quantity
Extended Description	You can enter a detailed description about the provided service item including any notes or handling instructions.
	Choose the Localize button to enter description in the multiple languages of the locales you may have configured.
	Note: All locale configuration should be completed before attempting to enter an extended item description. For more information about configuring locales, see the *Yantra 7x Platform Configuration Guide*.

6.1.1.2 Adding Service Options to a Provided Service Item

You can associate additional provided service options with a provided service item. These options can add additional capacity requirements and cost to the provided service you associate it with.

For example, you have configured an Installation provided service item that you use when installing carpet. You can also associate a provided service option called Remove Trash. With this options a customer can decide if they want the carpet installers to remove the trash left behind from the carpet installation.

For more information about creating provided service options, see Section 6.2, "Defining Provided Service Options" on page 173.

To add a service option to a provided service item:

1. In the Provided Service Details window, choose the Options tab.

2. Choose ✚. The Service Options Item Search pop-up window appears.

3. Enter applicable search criteria and choose 🔍. A list of service options is displayed.

4. Select the service options you want to add to the provided service item and choose 💾.

> **Important:**   You can only associate provided service options with the same unit of measure of the provided service item you are defining.

5. Choose 💾.

6.1.1.3 Defining a Provided Service Item's Instructions

You can define any special instructions that pertain to a provided service item.

You can use the Item Instructions tab for:

- Adding a Provided Service Item Instruction

- Modifying a Provided Service Item Instruction

- Deleting a Provided Service Item Instruction

6.1.1.3.1   Adding a Provided Service Item Instruction

To add a provided service item instruction:

1. In the Provided Service Details window, choose the Item Instructions tab.

2. From the Item Instructions table, choose 🐚. The Item Instruction Details pop-up window appears.

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

4. Choose 🖫.

Table 6–3   Item Instruction Details Pop-Up Window

Field	Description
Item Instruction Type	Select the item instruction type.
Sequence No	If there are multiple, sequential instructions for the provided service item, enter the sequence of the instruction you are adding.

Table 6–3   Item Instruction Details Pop-Up Window

Field	Description
Use Item Instruction Code	Choose Use Item Instruction Code if you want to use a pre-existing item instruction code.
Item Instruction Code	If you chose Use Item Instruction Code, select the applicable item instruction code.
Create New Item Instruction	Select Create New Item Instruction if no pre-existing item instruction code exists and you want to create a free-form text instruction.
Text	If you selected Create New Item Instruction, enter the instruction.

6.1.1.3.2   Modifying a Provided Service Item Instruction

To modify a provided service item instruction:

1. In the Provided Service Details window, choose the Item Instructions tab.

2. From the Item Instructions table, select the applicable item instruction choose . The Item Instruction Details pop-up window appears.

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

4. Choose .

6.1.1.3.3   Deleting a Provided Service Item Instruction

To delete a provided service item instruction:

1. In the Provided Service Details window, choose the Item Instructions tab.

2. From the Item Instructions table, select the applicable item instruction choose .

6.1.2 Deleting a Provided Service Item

To delete a provided service item:

1. From the tree in the application rules side panel, choose Provided Services > Provided Service Items. The Provided Service Item Search window appears in the work area.

2. Enter applicable search criteria and choose ![icon]. A list of provided service items is displayed.

3. Select the applicable provided service item and choose ![icon].

6.2 Defining Provided Service Options

You can define additional options that can be added to a provided service. These options can add additional capacity requirements and cost to the provided service you associate it with.

> **Note:** Provided service options can be associated with more than one provided service item.

For example, you have configured an Installation service item that you use when installing carpet. You can also create a provided service option to associate with the delivery service item called Remove Trash. With this option a customer can decide if they want the carpet installers to remove the trash left behind from the carpet installation.

For more information about associating a provided service option with a provided service item, see Section 6.1.1.2, "Adding Service Options to a Provided Service Item" on page 169.

You can use the Provided Service Options branch for:

• Creating a Provided Service Option

• Modifying a Provided Service Option

• Deleting a Provided Service Option

6.2.1 Creating a Provided Service Option

To create a provided service option:

1. From the tree in the application rules side panel, choose Provided Services > Provided Service Options. The Provided Service Option Search window appears in the work area.

2. Choose ✚. The Option Details pop-up window is displayed.

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

4. Choose 💾.

Table 6–4   Option Details Pop-Up Window

Field	Description
Item ID	Enter the provided service option item ID as you want it to appear throughout the system.
UOM	Select the unit of measure to associate with the provided service option. **Important:** You can only associate a provided service option with a provided service item that has the same unit of measure.
Short Description	Enter a brief description of the provided service option.

Table 6–4   Option Details Pop-Up Window

Field	Description
Fixed Capacity Units	Enter the amount of capacity that is consumed by the provided service based on its unit of measure. For example, if the unit of measure for this provided service option is Hours and it takes two hours to fulfill the option, you would enter 2.
Description	Enter a detailed description of the provided service option.

6.2.2 Modifying a Provided Service Option

To modify a provided service option:

1. From the tree in the application rules side panel, choose Provided Services > Provided Service Options. The Provided Service Option Search window appears in the work area.

2. Enter applicable search criteria and choose 🔍. A list of provided service options is displayed.

3. Select the applicable provided service option and choose ⚙. The Option Details pop-up window is displayed.

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

5. Choose 💾.

6.2.3 Deleting a Provided Service Option

To delete a provided service option:

1. From the tree in the application rules side panel, choose Provided Services > Provided Service Options. The Provided Service Option Search window appears in the work area.

2. Enter applicable search criteria and choose 🔍. A list of provided service options is displayed.

3. Select the applicable provided service option and choose ✖.

6.3 Defining Provided Service Master Units of Measure

You can define a master list of capacity and pricing units of measure to be used when creating a provided service item.
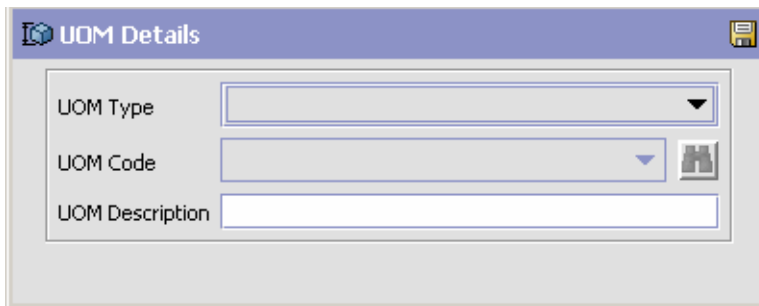
You can use the Provided Service UOM Master branch for:

- Creating a Master Unit of Measure
- Modifying a Master Unit of Measure
- Deleting a Master Unit of Measure

6.3.1 Creating a Master Unit of Measure

To create a master unit of measure:

1. From the tree in the application rules side panel, choose Provided Services > Provided Service UOM Master. The Provided Services Units of Measure window appears in the work area.

2. Choose ✚. The UOM Details pop-up window is displayed.

3. From UOM Type, select the applicable unit of measure type.

4. In UOM Code, select the unit of measure you want to be able to be used for provided services.

5. In UOM Description, enter a brief description of the provided service unit of measure.

6. Choose 💾.

6.3.2 Modifying a Master Unit of Measure

To modify a master unit of measure:

1. From the tree in the application rules side panel, choose Provided Services > Provided Service UOM Master. The Provided Services Units of Measure window appears in the work area.

2. Select the applicable unit of measure and choose 🛠. The UOM Details pop-up window is displayed.

3. In UOM Description, enter a brief description of the provided service unit of measure.

4. Choose 💾.

6.3.3 Deleting a Master Unit of Measure

To delete a master unit of measure:

1. From the tree in the application rules side panel, choose Provided Services > Provided Service UOM Master. The Provided Services Units of Measure window appears in the work area.

2. Select the applicable unit of measure and choose ✖.

6.4 Defining Provided Service Types

You can define service types to be used when creating a provided service item.

You can use the Provided Service Types branch for:

- Creating a Provided Service Type

- Modifying a Provided Service Type

- Deleting a Provided Service Type

6.4.1 Creating a Provided Service Type

To create a provided service type:

1. From the Product Management tree in the application rules side panel, choose Provided Services > Provided Service Types. The Provided Service Types window appears in the work area.

2. Choose ➕. The Service Type Details pop-up window is displayed.
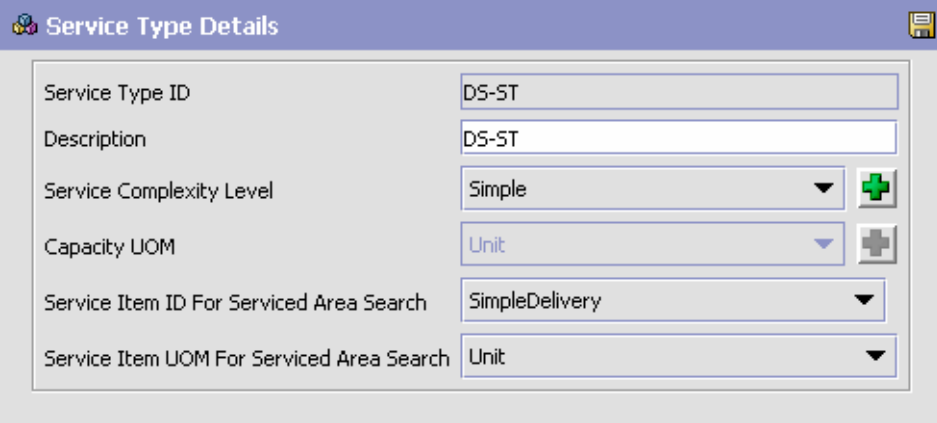
Table 6–5   Service Type Details Pop-up Window

Field	Descriptions
Service Type ID	Enter a unique identifier for the service type.
	The Service Type ID must be unique across delivery and provided services.
Description	Enter a description of the service type.
Service Complexity Level	Select a service complexity level.
	Note: Service Complexity Level is mandatory when defining a Service Type. Refer to Section 3.6, "Defining Service Complexity Levels" for more information.
Capacity UOM	Select a capacity UOM.
Service Item ID For Serviced Area Search	If you are planning on using the Serviced Area Search feature in the Yantra 7x Application Consoles, select a service item identifier from the drop-down list that is representative of typical provided services.
Service Item UOM For Service Area Search	If you are planning on using the Serviced Area Search feature in the Yantra 7x Application Consoles, select a service item unit of measure from the drop-down list that is representative of typical provided services.

3. Enter information in the applicable fields. Refer to Table 6–5 for more information.

4. Choose 💾.

6.4.2 Modifying a Provided Service Type

To modify a provided service type:

1. From the Product Management tree in the application rules side panel, choose Provided Services > Provided Service Types. The Provided Service Types window appears in the work area.

2. Select the applicable service type and choose 🛠. The Service Type Details pop-up window is displayed.

3. Edit information in the applicable fields. Refer to Table 6–5 for more information.

4. Choose 💾.

6.4.3 Deleting a Provided Service Type

To delete a provided service type:

1. From the Product Management tree in the application rules side panel, choose Provided Services > Provided Service Types. The Provided Service Types window appears in the work area.

2. Select the applicable service type and choose ✖.

7

Configuring Value Added Services

Value-Added Services (VAS) are performed to meet customer demands. These can be the demands of a buyer, such as special creating a customized order, or doing special processes for the buyer at the warehouse, or can be provided services to the customer, such as installing a light fixture.

When a work order is created manually, it consists of one or more services. These services can be of the following types:

- Kitting Service - Describes assembling components for an item

- DeKitting Service - Describes disassembling an item. This may be done to acquire an item component to complete another order.

- Compliance Service - Describes value added services that should be performed to supply an item to a specific buyer. Used in for Made-to-customer orders.

- Inventory Change Service - Describes how to convert inventory from one UOM to another.

One or more services can be included in work order, and have a sequence number assigned which indicates the order in which they should be performed. The activities are performed at all types of facilities including manufacturing facilities, flow-through and distribution centers.

Each service can contain one or more service activity, which specifies the category of activity, such as Assemble Components, Apply Logos, or Pack Components.

In addition, Provided Services can generate work orders. Provided Services represent services that can be ordered, such as item installation.

For more information about value added services and how they can be used, see the *Yantra 7x Product Concepts* guide.

This chapter describes:

- Defining a Value Added Service
- Defining Provided Service Items
- Defining an Activity

7.1 Defining a Value Added Service

There are five value added services. They are:

- Kitting Services
- Dekitting Services
- Compliance Services
- Inventory Change Services
- Provided Services

All of the value added services are configured similarly, except for Provided Services. The activities for the first four value added services are:

- Creating a Value Added Service
- Modifying a Value Added Service
- Deleting a Value Added Service

See Section 6.1, "Defining Provided Service Items" on page 166 for information on the configuration of Provided Services.

7.1.1 Creating a Value Added Service

To create a value added service for Kitting Services, DeKitting Services, Compliance Services, or Inventory Change Services:

1. From the tree in the application rules side panel, choose the value added service you wish to add, such as Kitting Service.

2. A window with a list of the services of that type appears.

3. Choose ✚. The value added services window for the selected service appears.

4. Enter an Item ID.

5. Choose 💾.
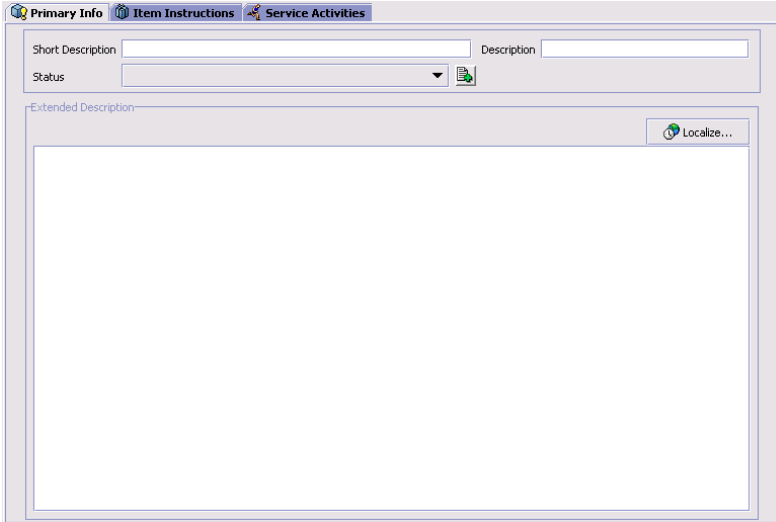
You can use the Provided Service Details window for:

- Defining a Value Added Service's Primary Information

- Defining a Value Added Service's Item Instructions

- Defining a Value Added Service's Service Activities

7.1.1.1 Defining a Value Added Service's Primary Information

To define a value added service's primary information:

1. In the Value Added Service's Detail window, select the Primary Info tab.

2. Enter information in the applicable fields. Refer to Table 7–1, "Primary Info Tab" for field value descriptions.

Table 7–1   Primary Info Tab

Field	Description
Short Description	Enter a description which summarizes this Value Added Service
Description	Enter a more detailed description of the Value Added Service.
Status	The status for this value added service record. Select Held (Unpublished) to defer making this value added service available for use. Otherwise, select Published to make this value added service available in the system.

Table 7–1   Primary Info Tab

Field	Description
Create Work Order While Scheduling An Order Requiring this Service	Used only for *compliance services*.
	Select this field to automatically generate a work order as necessary during scheduling an order. This is typically used when the scheduling needs to consider setting aside items to supply the order, or when there is a need for allocating time to perform the compliance service.
	When scheduling processing is performed, the processing may detect the need create more items to meet the needs of an order.
	This field lets you control whether a work order should be generated, based on your procedures.
	For example, you may have a compliance service that consists of adding a warranty card to each telephone shipped. Because of the way that the telephones are packed, this can be done as part of the packing process, and no separate work order is required. There is also no need to separately reserve the telephones for this particular order, as they do not to have any other special handling, and could be used to supply other order demands. In such a situation, you would not select this field.
	In a different scenario, the buyer's corporate label is applied to the telephones. In order to schedule the order, a work order is generated to track the process, and inventory may be allocated to create the customized telephones. These customized telephones could not be used to supply another buyer's order. In this case, you would select this field, to automatically generate the work order and to allocate stock to fulfil the compliance service task.

Table 7–1   Primary Info Tab

Field	Description
Run Quantity	Used only for *kitting services*.
	The number of items to be made when a compliance service is run. By grouping the production of an item that has compliance services applied to it, inventory can be created in anticipation of the buyer's need.
	The run quantity is a number that indicates how many items to batch together: the actual request for product and available inventory determine how many items should have the compliance service applied.
	For example, if the run quantity is 10, the buyer requests 8 of the item, and there's only 1 on hand, 10 items will have the compliance services applied. The result is the buyer receives 8 items, 1 from current inventory, 7 that is newly created, and there will be 3 newly created items now available in inventory.
	If the buyer requires more than the run quantity will produce, the run quantity is used to create several runs. For example, if the buyer were to request 22 items, and only 1 item is in stock, doing a run of 10 would not satisfy the request. Doing two runs of 10 each would still not satisfy the request, but doing 3 runs would satisfy the request. Therefore, a single run of 30 is done.
	The run quantity should be set based on the anticipated buyer requirements. For example, for bulky items such as refrigerators or washing machines, the number might be low. For items that the buyer purchases in large quantities, such as T-shirts embroidered with a sports team logo, the number might be higher.
Extended Description	Enter a more detailed description. This can be localized by choosing the Localize button.

7.1.1.2 Defining a Value Added Service's Item Instructions

You can define any special instructions that are appropriate to an item. For example, you can associate a special instruction of Handle With Care with a fragile product item.
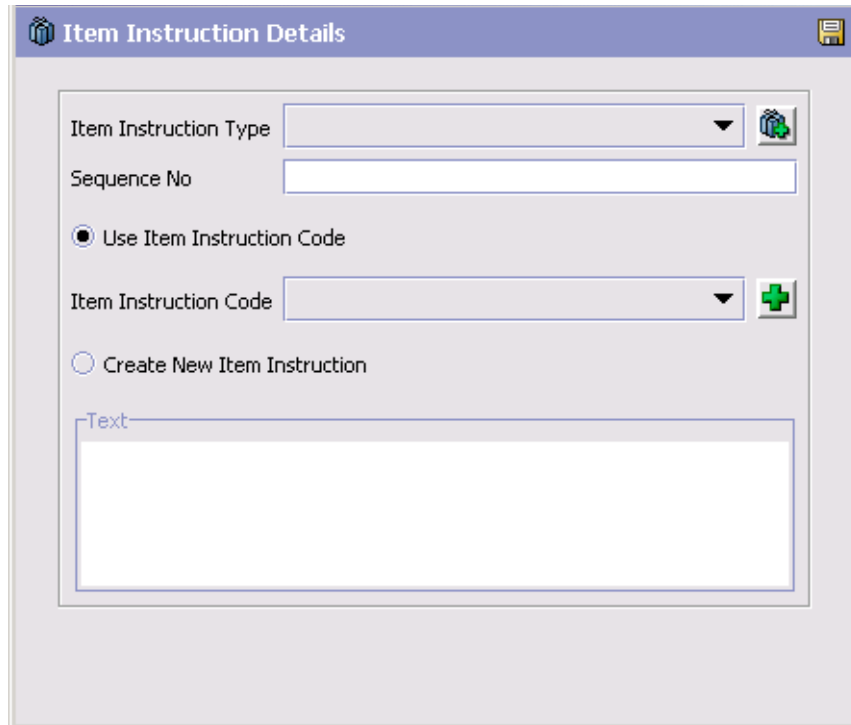
You can use the Item Instructions tab for:

- Creating Item Instructions

- Modifying an Item Instruction

- Deleting an Item Instruction

7.1.1.2.1 Creating Item Instructions

To add an item instruction:

1. In the Value Added Services window, choose the Item Instructions tab.

2. From the Item Instructions table, choose 📦. The Item Instruction Details pop-up window appears.

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

4. Choose 💾.

Table 7–2   Item Instruction Details Pop-Up Window

Field	Description
Item Instruction Type	Select the item instruction type. For example, a Handling item type indicates the instruction pertains to handling the product item.
Sequence No	If there are multiple, sequential instructions for the product item, enter the sequence of the instruction you are adding.
Use Item Instruction Code	Choose Use Item Instruction Code if you want to use a pre-existing item instruction code. For example, you could have a pre-existing Handle With Care item instruction code that you can associate with fragile items.
Item Instruction Code	If you chose Use Item Instruction Code, select the applicable item instruction code.
Create New Item Instruction	Select Create New Item Instruction if no pre-existing item instruction code exists and you want to create a free-form text instruction.
Text	If you selected Create New Item Instruction, enter the instruction.

7.1.1.2.2 Modifying an Item Instruction

To modify a item instruction:

1. In the Value Added Services window, choose the Item Instructions tab.

2. From the Item Instructions table, select the applicable item instruction choose 🎲. The Item Instruction Details pop-up window appears.

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

4. Choose 💾.

7.1.1.2.3 Deleting an Item Instruction

To delete an item instruction:

1. In the Value Added Services window, choose the Item Instructions tab.

2. From the Item Instructions table, select the applicable item instruction choose .

7.1.1.3 Defining a Value Added Service's Service Activities

The Service activities are the high level steps in providing a service. For example, if the value added service consisted of assembling a telephone, the service activities might be:

*   Getting components

*   Adding accessories

*   Applying custom label

You can use this window for:

Creating a Service Activity

Modifying a Service Activity

Deleting a Service Activity

7.1.1.3.1 Creating a Service Activity

To create a service activity:

1. In the Value Added Services window, choose the Service Activity tab.

2. Choose . The Service Activity pop-up window appears.

3. Select an Activity Code and a sequence number, which is used to order the actions for the service.

4. Choose .

> **Note:** At least one Service Activity should be associated with a Value-Added Service Item for the inventory updates to occur using the `confirmWorkOrder()` or `confirmWorkOrderActivity()` API.

You can also use this window for:

*   Adding a Service Activity Instructions

*   Modifying a Service Activity Instruction

- Deleting a Service Activity Instruction

Adding a Service Activity Instructions

Service Activity Instructions provide details on how to perform a service activity. For example, the service activity may be "Assemble product". The Service Activity instructions provides the details for how to do this, such as where coupons should be place in a product package, how special labelling should be applied, or other detailed instructions.

To add a Service Activity Instruction:

1. From the Service Activity Details pop-up window, choose ✚.

2. The Service Activity Instructions Details window appears.

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

Table 7–3   Service Activity Instruction Details Window

Field	Description
Sequence No	The sequence no is used to order the activity instructions. For example, a service activity instruction with a sequence no of '1' should be performed before a service activity instruction of '2'.
Instruction URL	Provides a URL which points to existing instructions for this service. For example, you may already have a existing procedure for inserting promotional materials into certain packages. Enter the URL for that procedure here.
Instruction Usage	Any comments on how this instruction should be used
Text	Enter details of the instruction.

Modifying a Service Activity Instruction

To modify a service activity:

4. From the Service Activity table, select the applicable service activity and choose 🧩. The Service Activity Details pop-up window appears.

5. In the Service Activity Instructions list, choose ![icon]. The Service Activity Instructions Details window appears.

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

7. Choose ![icon].

Deleting a Service Activity Instruction

To delete a service activity instruction:

1. In the Value Added Services window, choose the Service Activity tab.

2. From the Service Activity table, select the applicable service activity and choose ![icon].

3. From the Item Instructions table, select the applicable service activity and choose ![icon].

7.1.1.3.2 Modifying a Service Activity

To modify a service activity:

1. In the Value Added Services window, choose the Service Activity tab.

2. Select a Service Activity, and choose ![icon]. The Service Activity pop-up window appears.

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

4. Choose ![icon].

7.1.1.3.3 Deleting a Service Activity

To delete a service activity:

1. In the Value Added Services window, choose the Service Activity tab.

2. Select a Service Activity, and choose ![icon].

7.1.2 Modifying a Value Added Service

To modify a value added service:

1. From the tree in the application rules side panel, choose the value added service you wish to modify, such as Kitting Service.

2. A Value window with a list of the services of that type appears.

3. Select the value added service you wish to modify, and choose ⚙. The Value Added Services detail window appears.

4. Enter information in the applicable fields.

5. Choose 💾.

7.1.3 Deleting a Value Added Service

1. From the tree in the application rules side panel, choose the value added service you wish to delete, such as Kitting Service.

2. A Value window with a list of the services of that type appears.

3. Select the value added service you wish to delete, and choose ✖.

7.2 Defining an Activity

Activities define the categories of service activity in Yantra 7x.

This section describes:

- Creating an Activity
- Modifying an Activity
- Deleting an Activity

7.2.1 Creating an Activity

An Activity defines the actions that should be performed in this service. To create a service action:

1. From the tree in the application rules side panel, choose Value Added Services > Activities. A window with a list of the service activities appears.

2. Choose the line marked with a star (*) and click into each of the fields to enter values for Activity Code, which defines the Activity, and the Description.

7.2.2 Modifying an Activity

To modify a service activity:

1. From the tree in the application rules side panel, choose Activities. A window with a list of the activities appears.

2. Choose the activity you wish to modify, and click in the Description field to change the Description.

7.2.3 Deleting an Activity

To delete an activity:

1. From the tree in the application rules side panel, choose Activities. A window with a list of the service activities appears.

2. Choose the activity you wish to delete, and choose ✗ .

A

Time-Triggered Transaction Reference

Yantra 7x 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."

For more information about statistics persistence, see the *Yantra 7x 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 will be 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.

Yantra 7x 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

Yantra 7x 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 executed successfully in a given time interval.

- ExecuteMessageError - The number of jobs that failed to execute 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 7.5 SP1 for time-triggered transactions, monitors, and integration and application servers may change with the next release of Yantra.

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 information on running time-triggered transactions, see the *Yantra 7x Installation Guide*. For information on fine-tuning system performance while running them concurrently, see the *Yantra 7x Performance Management Guide*.

A.2 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 7.5 SP1 for time-triggered transactions, monitors, and integration and application servers may change with the next release of Yantra.

> **Note:** All Business Process Time-Triggered Transactions have a `CollectPendingJobs` criteria parameter. If this parameter is set to `N`, the agent will not collect information on the pending jobs for that time-triggered transaction. This pending job information is used for monitoring the agent in the *Yantra 7x System Management Guide*.
>
> 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.2.1 Change Load Status

This transaction is equivalent to the `changeLoadStatus()` API. For detailed information about this transaction, see *Yantra 7x 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–1   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–2   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–3   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 current date value in the YFS_Task_ Q table.

Events Raised

This transaction raises events specified by the `changeLoadStatus()` API in the *Yantra 7x Javadocs*.

A.2.2 Change Shipment Status

This transaction is equivalent to the `changeShipmentStatus()` API. For detailed information about this transaction, see *Yantra 7x 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–4   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–5   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–6   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 specified by the `changeShipmentStatus()` API in the *Yantra 7x Javadocs*.

A.2.3 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.3.3.3, "Delivery Plan Purge" on page 273).

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 Yantra 7x Application Consoles must schedule purge jobs.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–7   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–8   Close Delivery Plan 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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–9   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–10   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.

A.2.4 Close Load

To boost system performance, this transaction serves as a temporary purge until the Load Purge deletes load-related data (see Section A.3.3.9, "Load Purge" on page 285).

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–11   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–12   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–13   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–14   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.

A.2.5 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 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 a property defined in the `yfs.properties` file:
`yfs.closemanifest.online = Y/N`

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–15   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–16   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 will 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 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.

Statistics Tracked
The following are statistics are tracked for this transaction:

Table A–17   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–18   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.2.6 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 all the order lines reach the configured pickup status(es). 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:** 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–19   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–20   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–21   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–22   Events Raised by the Close Order Transaction

Transaction/Event	Data Published	Template Support?
ON_SUCCESS	YFS_CLOSE_ORDER.ON_SUCCESS.xml	Yes

A.2.7 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–23   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)
Abstract Transaction	No
APIs Called	None
User Exits Called	None

Criteria Parameters

The following are the criteria parameters for this transaction:

Table A–24   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.

Table A–24   Close Receipts Criteria Parameters

Parameter	Description
Node	Node for which the Close Receipts Purge needs to be run. If not passed, then all nodes are monitored.
AgentCriteriaGroup	Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will 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 Platform > System Administration > Agent Criteria Groups.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–25   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–26   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" appears. 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 *Yantra 7x 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.2.8 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.3.3.23, "Shipment Purge" on page 320).

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–27   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–28   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.
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.

Statistics Tracked

The following are statistics are tracked for this transaction:

Table A–29   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–30   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.2.9 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–31   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–32   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.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will 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 Platform > System Administration > Agent Criteria Groups.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–33   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–34   Events Raised by the Collect Shipment Statistics Transaction

Transaction/Event	Data Published	Template Support?
ON_SUCCESS	YDM_COLLECT_ STATISTICS.ON_ SUCCESS.xml	No

A.2.10 Complete Planned Order

Complete Planned Order takes planned orders to completion after negotiations are resolved. Use this time-triggered transaction on a planned order after negotiation is complete. This time-triggered transaction is being deprecated for Version 5.0-SP1.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–35   Complete Planned Order Attributes

Attribute	Value
Transaction Name	Complete Planned Order
Transaction ID	PLAN_ORDER_COMPLETE
Base Document Type	Order
Base Process Type	Planned Order Execution
Abstract Transaction	No
APIs Called	None
User Exits Called	None

Criteria Parameters

The following are the parameters for this transaction:

Table A–36   Order Complete Criteria Parameters

Parameter	Description
DocumentType	Required. The type of document to process for a particular run. Valid values are: • 0001 - Sales Order (Default) • 0002 - Planned Order
TotalRecords	Optional. Number of records for the time-triggered transaction to pass. If not passed, defaults to 5000.

Statistics Tracked

None.

Pending Job Count

None.

Events Raised

The following events are raised by this time-triggered transaction:

Table A–37   Events Raised by the Order Complete Transaction

Transaction/Event	Key Data	Data Published	Template Support?
PLAN_ORDER_ COMPLETE	modifyOrder _dbd.txt	YFS_ getPlannedOrderSta tus_Output.xml	No

A.2.11 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–38   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–39   Consolidate Additional Inventory Criteria Parameters

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.r
Number of Records To Buffer	Optional. Number of inventory item records (whose additional supplies and demands will be consolidated_ to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–40   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.2.12 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 details, see the `createShipment()`, `changeShipment()`, and
`releaseOrder()` APIs in the *Yantra 7x 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` will never
> be consolidated with any other release.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–41   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–41   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. See *Yantra 7x Javadocs*.

Criteria Parameters

The following are the criteria parameters for this transaction:

Table A–42   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Pending Job Count

Table A–43   Consolidate to Shipment Statistics

Statistic Name	Description
NumOrderReleasesConsolidated	Number of order releases consolidated.

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–44   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 specified by the createShipment() or changeShipment() APIs in the *Yantra 7x Javadocs*.

However, note that the template name would read <TransactionId>.ON_ SUCCESS.xml.

A.2.13 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 on creation of chained orders, see the documentation on the `createChainedOrder()` API and the `YFSDetermineChainedOrderForConsolidation` user exit in the *Yantra 7x Javadocs*.

This transaction should be invoked after order scheduling.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–45   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–46   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Note: If there are 2 orders being processed and the first order creates a

Table A–47   Create Chained Order Statistics

Statistic Name	Description
NumOrdersProcessed	Number of orders processed for creating chained order.
NumOrdersCreated	Number of chained orders created.

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 specified by the `createChainedOrder()` API in *Yantra 7x Javadocs*.

A.2.14 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 on creation of derived orders, see the `createDerivedOrder()` API and `YFSDetermineDerivedOrderForConsolidation` user exit in *Yantra 7x Javadocs*.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–48   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–49   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–50   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 specified by the `createDerivedOrder()` API in the *Yantra 7x Javadocs*.

A.2.15 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.2.16, "Create Shipment Invoice" on
> page 227.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–51   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–52   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–53   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 specified by the createOrderInvoice() API in the *Yantra 7x Javadocs*.

A.2.16 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.2.15, "Create Order Invoice" on page 225.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–54   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–55   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–56   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 specified by the
`createShipmentInvoice()` API in the *Yantra 7x Javadocs*.

A.2.17 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–57   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	None

Criteria Parameters

The following are the criteria parameters for this transaction:

Table A–58   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.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will 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 Platform > System Administration > Agent Criteria Groups.

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–59   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.2.18 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–60   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
APIs Called	None
User Exits Called	None

Criteria Parameters

The following are the criteria parameters for this transaction:

Table A–61   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–62   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.2.19 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–63   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–64   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–65   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.2.20 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.2.21, "Payment Execution" on page 237.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–66   Payment Collection Attributes for Sales Orders

Attribute	Value
Base Transaction ID	PAYMENT_COLLECTION
Base Document Type	Order

Table A–66   Payment Collection Attributes for Sales Orders

Attribute	Value
Base Process Type	Order Fulfillment
Abstract Transaction	No
APIs Called	`requestCollection()`

Table A–67   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–68   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. Enterprise for which the transaction needs to be run. If not passed, then all enterprises are monitored.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–69   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 currentdate. 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–70   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
ON_LIABILITY_ TRANSFER	modifyOrder_dbd.txt	YFS_PAYMENT_ COLLECTION.ON_ LIABILITY_ TRANSFER.xml	Yes

A.2.21 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–71   Payment Execution Attributes for Sales Orders

Attribute	Value
Base Transaction ID	PAYMENT_EXECUTION
Base Document Type	Order
Base Process Type	Order Fulfillment

Table A–71 Payment Execution Attributes for Sales Orders

Attribute	Value
Abstract Transaction	No
APIs Called	`executeCollection()`
User Exits Called	collectionCreditCard, collectionOthers, collectionCustomerAcct

Table A–72 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–73 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

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–74   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.
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–75   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 specified by the `executeCollection()` API in the *Yantra 7x Javadocs*.

A.2.22 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–76   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–77   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–78   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–79   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_ postInventoryMa tch_output.xml	No

A.2.23 Process Order Hold Type

You can create a time-triggered transaction, derived from the abstract transaction PROCESS_ORDER_HOLD_TYPE. 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 YFS_TASK_Q 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 none can be processed, the YFS_TASK_Q record is deleted. If some hold types can be processed, the user exit `processOrderHoldType` is invoked with the list of hold types to be processed. `processOrderHoldType` returns the list of hold types that can be removed from the order.

The transaction will modify the order and update the order hold type list based on the output of `processOrderHoldType`. If no hold types can be processed by this transaction, then the YFS_TASK_Q record is deleted. If some hold types still can be processed, YFS_TASK_Q is updated with the next available date.

The `processOrderHoldType` user exit can also be used to add hold types, and change the status of a hold type already applied to an order. For more information on the `processOrderHoldType` user exit, refer to the *Yantra 7x Javadocs*.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–80   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–81   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.
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.

Statistics Tracked
None.

Pending Job Count
None

Events Raised
The following events are raised by this time-triggered transaction:

Table A–82   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
* Note: Some of the elements and attributes are not template driven. Refer to the xml for elements level details.				

A.2.24 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–83   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–84   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.

Statistics Tracked

None.

Pending Job Count

None

Events Raised

The following events are raised by this time-triggered transaction:

Table A–85   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.2.25 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–86   Publish Negotiation Results Attributes

Attribute	Value
Base Transaction ID	PUBLISH_ORD_NEGOTIATION
Base Document Type	Order
Base Process Type	Order Negotiation

Table A–86   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–87   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Pending Job Count

Table A–88   Publish Negotiation Results Statistics

Statistic Name	Description
NumNegotiationsProcessed	Number of negotiations processed.
NumNegotiationsPublished	Number of negotiations published.

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–89   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.2.26 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 `releaseOrder()` API in the *Yantra 7x Javadocs*.

> **Important:**   Yantra 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–90   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–91   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 - releases lines quantities only after release date criteria have been met. Default.
CheckInventory	Optional. Determine whether inventory should be checked. Valid values are: • Y - inventory needs to be checked. Default. • N - inventory does not need to be checked
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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–92   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, if tasks on hold are not ready to be processed.

Events Raised

This transaction raises events specified by the `releaseOrder()` API in the *Yantra 7x Javadocs*.

A.2.27 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–93   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–94   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.
EnterpriseCode	Optional. Enterprise for which the Route Shipment transaction needs to be run. If not passed, then all enterprises are monitored.
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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–95   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–96   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.

A.2.28 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:** Yantra 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–97   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–98   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.
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 - only schedules line quantities. Default. **Note:** enabling this parameter will not validate hold types configured for the release transaction.

Table A–98   Schedule Criteria Parameters

Parameter	Description
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	Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–99   Schedule Statistics

Statistic Name	Description
NumFutureDateFailures	Number of orders that Yantra 7x 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–99   Schedule Statistics

Statistic Name	Description
NumOrdersCannotBeProcessedFailures	Number of orders that Yantra 7x 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:** scheduled includes all status changes 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, if tasks on hold are not ready to be processed.

Events Raised

This transaction raises events as specified in the `scheduleOrder()` API in *Yantra 7x Javadocs*.

A.2.29 Send Invoice

This transaction publishes invoice data that can be directed to an external accounts receivable systems.

In environments that require an interface with accounts receivable systems, this job needs to be scheduled. This job 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 will take care of payment collection. Invoices can be published as soon as they are created.

• Publish invoice after payment collection - This implies that the Yantra 7x Application Consoles takes care of the payment collection and an invoice notification can be received only after the total order amount is collected.

> **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–100   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–101   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–102   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–103   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_ getOrderInvoiceDet ails_output.xml	Yes

Additional events may be raised by the getOrderInvoiceDetails() API. For detailed information about the events, see the *Yantra 7x Javadocs* for this API.

A.2.30 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 sendOrder() API in *Yantra 7x 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–104   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–105   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.

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 specified by the `sendOrder()` API in the *Yantra 7x Javadocs*.

A.2.31 Send Release

The Send Release Agent dispatches releases to ship nodes.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–106   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–107   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.
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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–108   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–109   Events Raised by the Send Release Transaction

Transaction/Event	Data Published
PUBLISH_SHIP_ADVICE	YFS_publishShipAdvice.xml

A.2.32 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–110   Start Order Negotiation Attributes

Attribute	Value
Base Transaction ID	START_ORD_NEGOTIATION
Base Document Type	Order
Base Process Type	Order Fulfillment
Abstract Transaction	No

Table A–110 Start Order Negotiation Attributes

Attribute	Value
APIs Called	`createNegotiation()`
User Exits Called	YCPBeforeCreateNegotiationUE, YCPGetNegotiationNoUE

Criteria Parameters

The following are the criteria parameters for this transaction:

Table A–111 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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–112 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 specified by the `createNegotiation()` API in the *Yantra 7x Javadocs*.

A.3 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 will not be accurate in the Order Shipment Console.

> **Note:** Some of the statistics collected and tracked in Release 7.5 SP1 for time-triggered transactions, monitors, and integration and application servers may change with the next release of Yantra.

> **Note:** All Time-Triggered Purge Transactions have a `CollectPendingJobs` criteria parameter. If this parameter is set to `N`, the agent will not collect information on the pending jobs for that time-triggered transaction. This pending job information is used for monitoring the agent in the *Yantra 7x System Management Guide*.
>
> 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 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.3.2 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 purge log file directory:

1. Edit the `<YFS_HOME>/resources/yfs.properties` file.

2. Set `yfs.purge.path=<full absolute path of log directory>`.

For example, on UNIX you might specify the log files to be written to the `/app/yfs/logs/purges` directory.

A.3.3 Available Purges

This section contains details of all purge transactions in alphabetical order. The time-triggered purge transactions are:

- Alert Purge
- Capacity Purge
- Delivery Plan Purge
- Export Table Purge
- Import Table Purge
- Inventory Purge
- Inventory Audit Purge
- Load Purge
- Manifest Purge
- Negotiation History Purge
- Negotiation Purge
- Order History Purge
- Order Purge
- Order Status Audit Purge
- Picklist Purge
- Price List Purge
- Receipt History Purge
- Receipt Purge
- Reprocess Error Purge
- Reservation Purge
- Shipment History Purge
- Shipment Purge

- Shipment Statistics Purge

- Statistics Purge

- Work Order History Purge

- Work Order Purge

A.3.3.1 Alert Purge

This purge removes alert data from the system. This reduces the load from frequently accessed tables. The alert should be marked as CLOSED.

Any enterprise using the Yantra 7x Application Consoles must schedule purge transactions.

All inactive alerts with the resolution date smaller than or equal to the current date minus the purge criteria's retention days can be configured to be picked up by the Alert Purge.

This purge agent also closes any open alerts where the number of expiration days is greater than zero, and the modified timestamp is less that the current date minus the number of expiration days.

The alert purge agent purges only the alerts that are marked as CLOSED.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–113   Alert Console Purge Attributes

Attribute	Value
Base Transaction ID	INBOXPRG
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–114   Alert Console Purge Criteria Parameters

Criteria Parameters	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 will not collect information on the pending jobs for this monitor. This pending job information is used for monitoring the monitor in Yantra 7x System Management.
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 organization for which the Alert 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 will be 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–115   Alert Console Purge Statistics

Statistic Name	Description
NumInboxPurged	Number of inbox records purged.

Pending Job Count

For this transaction the pending job count is the number of records that can be purged from the YFS_INBOX table.

Events Raised

None.

Tables Purged

YFS_INBOX

YFS_INBOX_AUDIT

YFS_INBOX_REFERENCES

A.3.3.2 Capacity Purge

This purge removes capacity data from the system. This reduces load from the frequently accessed tables.

Any enterprise using the Yantra 7x Application Consoles must schedule purge transactions.

The following can be configured to be picked up by the Capacity Purge:

- All resource pool standard capacity periods with effective to date less than or equal to the current date minus the purge criteria's retention days.

- All resource pool overridden capacity with the capacity date less than or equal to 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 capacity reservations where appointment date is less than system date minus the purge criteria's retention days (or ManualReservationPurgeLeadDays for manual reservations) and reservation Id is blank.

- All capacity reservations where expiration date has passed and reservation Id is not blank.

Attributes

The following are the attributes for this time-triggered transaction:

Table A−116   Capacity Purge Attributes

Attribute	Value
Base Transaction ID	CAPACITYPRG
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−117   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 will be 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–118   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 Lead Days). When this table is purged, YFS_RES_POOL_CONSMPTN_DTLS will be purged also.

The YFS_RES_POOL_CONSMPTN_DTLS table is purged when RESERVATION_EXPIRATION_DATE <= (CurrentDate - LeadDays)

A.3.3.3 Delivery Plan Purge

This purge deletes delivery plans after they have completed their typical lifecycles. 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 setup.

Any enterprise using the Yantra 7x Application Consoles must schedule purge transactions.

> **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–119   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–120   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.

Table A–120   Delivery Plan Purge Criteria Parameters

Parameter	Description
EnterpriseCode	Optional. Enterprise for which the Delivery Plan Purge needs to be run. If not passed, then all enterprises are monitored.
Live	Optional. Mode in which to run. Defaults to N. • 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 will be 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–121   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.3.3.4 Export Table Purge

This purge removes export table data from the system. This reduces load from the frequently accessed tables. It purges records in YFS_EXPORT tables that meet the following criteria:

- YFS_EXPORT records should be marked as processed (Status = 10).

- The last modified time should be before the lead time setup.

> **Note:** This purge only reads the rules defined by the hub. Enterprise overridden rules are not considered.

Any enterprise using the Yantra 7x Application Consoles must schedule purge transactions.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–122   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–123   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 will be 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–124   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.3.3.5 Import Table Purge

This purge removes import table data from the system. This reduces load from the frequently accessed tables. It purges records in YFS_IMPORT tables that meet the following criteria:

- YFS_IMPORT records should be marked as processed (Status = "10").

- The "last modified time" should be before the lead time setup.

> **Note:** This purge only reads the rules defined by the hub. Enterprise overridden rules are not considered.

Any enterprise using the Yantra 7x Application Consoles must schedule purge transactions.

Attributes
The following are the attributes for this time-triggered transaction:

Table A–125   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

Criteria Parameters
The following are the criteria parameters for this transaction:

Table A–126   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.
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 will be 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–127   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.3.3.6 Inventory Audit Purge

This purge removes inventory audit data from the system. This reduces load from the frequently accessed tables.

Any enterprise using the Yantra 7x Application Consoles must schedule purge transactions.

All inventory audits of the provided organization with modify timestamp less than the current date minus the purge criteria's retention days can be configured to be picked up by the Inventory Audit Purge.

> **Note:** Number of Threads for this purge's agent criteria details must be set to 1. For more information on agent criteria, refer to the *Yantra 7x Platform Configuration Guide*.

> **Important:** The Inventory Audit purge will 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–128   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–129   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.
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 will be 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–130   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.3.3.7 Inventory Purge

This purge removes inventory data from the system. This reduces load from the frequently accessed tables.This purge does not take retention days into account when purging.

You can use purge codes pseudo-logic to benefit in analyzing purges. An inventory data is picked up for purge if it meets the following criteria:

- Supply record has the same availability type as the node. For example, TRACK or INFINITE.

- Supply record has 0 quantity.

- Supply record do not contain the supply type "INFO".

For YFS_INVENTORY_TAG, it is purged if the INVENTORY_TAG_KEY is not used by any of the existing supply and demand, with the following two exceptions:

- Ship Node Inventory Type is Infinite, Inventory Supply Type has Track, and Quantity = 0, then not purged.

- Ship Node Inventory Type is Track, Inventory Supply Type has Infinite, and Quantity = 0, then not purged.

Any enterprise using the Yantra 7x Application Consoles must schedule purge transactions.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–131   Inventory Purge Attributes

Attribute	Value
Base Transaction ID	INVENTORYPRG
Base Document Type	General

Table A–131   Inventory Purge Attributes

Attribute	Value
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–132   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 will be 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−133   Inventory Purge Statistics

Statistic Name	Description
NumInventoryDemandsPurged	Number of inventory demands purged.
NumInventoryReservationsPurged	Number of inventory reservations purged.
NumInventoryTagsPurged	Number of inventory tags 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, and YFS_Inventory_Reservation tables.

Events Raised

None.

Tables Purged

YFS_INVENTORY_DEMAND

YFS_INVENTORY_TAG

YFS_INVENTORY_RESERVATION

YFS_INVENTORY_SUPPLY

A.3.3.8 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 Yantra 7x's 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 on configuring the synchronization with node inventory, refer to the *Yantra 7x Inventory Synchronization Configuration Guide*.

The Inventory Supply Temp purge agent will be used to purge all records in the YFS_INVENTORY_SUPPLY_TEMP table whose modify timestamp is less then current time minus purge criteria's lead days for a group of `YantraMessageGroupID`.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–134   Inventory Supply Temp Purge Attributes

Attribute	Value
Base Transaction ID	SUPPLYTEMPPRG
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–135   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.

Table A–135   Inventory Supply Temp 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 will be 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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–136   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.3.3.9 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 Yantra 7x Application Consoles must schedule purge transactions.

Attributes

The following are the attributes for this time-triggered transaction:

Table A−137   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−138   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.

Table A–138   Load Purge Criteria Parameters

Parameter	Description
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 will be 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–139   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_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.3.3.10 Manifest Purge

This purge picks up all the manifests that have been marked as 'Closed' and purges them.

Any enterprise using the Yantra 7x Application Consoles must schedule purge transactions.

All manifests which do not associate to any shipments and with modify timestamp less than the current date minus the purge criteria's retention days can be configured to be picked up by the Manifest Purge.

> **Note:** All the shipments associated with the manifests should have been purged before running this purge agent.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–140   Manifest Purge Attributes

Attribute	Value
Base Transaction ID	MANIFESTPRG
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–141   Manifest Purge 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 will be 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.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will 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 Platform > System Administration > Agent Criteria Groups.
ShipNode	Optional. Ship node for which the Manifest Purge needs to be run. If not passed, then all ship nodes are monitored.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–142   Manifest Purge Statistics

Statistic Name	Description
NumManifestsPurged	Number of manifests purged.

Pending Job Count

For this transaction the pending job count is the number of records that can be purged from the YFS_Manifest table.

Events Raised

None.

Tables Purged

YFS_MANIFEST

> **Note:** To purge Manifests, the Shipments related to the manifests should be purged by Shipment Purge, and the Manifests should be in 'Closed' status. For more information, see Section A.3.3.23, "Shipment Purge" on page 320.

A.3.3.11 Negotiation History Purge

This purge removes negotiation history data from the system. This reduces load from the frequently accessed tables. It purges data from the order negotiation history tables.

Any enterprise using the Yantra 7x Application Consoles must schedule purge transactions.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–143   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–144   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 will be 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–145   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_NEGOTIATION_HDR_H

YFS_NEGOTIATION_LINE_H

YFS_RESPONSE_H

YFS_RESPONSE_HDR_H

YFS_RESPONSE_LINE_H

YFS_RESPONSE_LINE_DTL_H

A.3.3.12 Negotiation Purge

This purge archives data into history tables after it completes its typical lifecycle. This reduces load from the frequently accessed tables. It works from the task queue (YFS_TASK_Q) table, picking up negotiations in which the last modification time occurs before the lead time set up and which are in statuses that can be picked.

Any enterprise using the Yantra 7x Application Consoles must schedule purge transactions.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–146   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–147   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 will be moved to history tables without actually moving them.

Table A–147   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–148   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_NEGOTIATION_HDR

YFS_NEGOTIATION_LINE

YFS_RESPONSE

YFS_RESPONSE_HDR

YFS_RESPONSE_LINE

YFS_RESPONSE_LINE_DTL

A.3.3.13 Order History Purge

This purge deletes data from history tables after it completes its typical lifecycle. This reduces load from the frequently accessed tables. It deletes data from the history tables.

Any enterprise using the Yantra 7x Application Consoles must schedule purge transactions.

> **Note:** Order should have been purged and moved into the history tables before you can run this transaction. See Section A.3.3.14, "Order Purge" on page 298.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–149   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–150   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.

Table A–150   Order History Purge Criteria Parameters

Parameter	Description
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 will be 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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–151   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_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_REFERENCE_TABLE_H

YFS_TAX_BREAKUP_H

A.3.3.14 Order Purge

This purge archives data into history tables after it completes its typical lifecycle. See Section A.3.3.13, "Order History Purge" on page 295. This reduces load from the 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.

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.

- Shipped (3700) and all extended Shipped statuses.

- Cancelled (9000) and all extended Cancelled statuses.

- Shorted (9020) and all extended Shorted statuses.

You can use purge codes pseudo-logic to benefit in analyzing purges. An order is picked up for purge if it meets the following criteria:

1. All open child orders (derived, chained, return, exchange, procurement, or refund fulfillment) for the order must already be purged.

2. No pending transfer-out charges to another order exceeding the transfer-ins.

3. No pending adjustment invoices.

An order is purged immediately if it meets the above three criteria and is completely cancelled.

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 lead 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 setup.

• Any enterprise using the Yantra 7x Application Consoles 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.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–152   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–153   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.
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 will be 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–154   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_CHARGE_TRANSACTION

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_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_REFERENCE_TABLE

YFS_TAX_BREAKUP

YFS_ACTIVITY_DEMAND

A.3.3.15 Order Status Audit Purge

This purge removes order status audit data from the system. This reduces load from the frequently accessed tables. It purges all records before the lead time setup.

Any enterprise using the Yantra 7x Application Consoles 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–155   Order Status Audit Purge Attributes

Attribute	Value
Base Transaction ID	STATUSAUDITPRG
Base Document Type	Order

Table A–155   Order Status Audit Purge Attributes

Attribute	Value
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–156   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 will be 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:

Pending Job Count

Table A–157   Order Status Audit Purge Statistics

Statistic Name	Description
NumStatusAuditsPurged	Number of status audits purged.

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.3.3.16 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 Yantra 7x Application Consoles must schedule purge transactions.

Attributes

> **Note:** All shipments associated with the picklists should have been purged before running this purge agent.

The following are the attributes for this time-triggered transaction:

Table A–158   Picklist Purge Attributes

Attribute	Value
Base Transaction ID	PICKLISTPRG
Base Document Type	Order
Base Process Type	Order Delivery
Abstract Transaction	No

Table A–158   Picklist Purge Attributes

Attribute	Value
APIs Called	None
User Exits Called	YFSBeforePurgeUE

Criteria Parameters

The following are the criteria parameters for this transaction:

Table A–159   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 will be 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–160   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.3.3.17 Price List Purge

This purge removes price list data from the system. This reduces load from the frequently accessed tables.

Any enterprise using the Yantra 7x Application Consoles must schedule purge transactions.

All price list sets with valid date less than the current date minus the purge criteria's retention days can be configured to be picked up by the Price List Purge.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–161   Price List Purge Attributes

Attribute	Value
Base Transaction ID	PRICELISTPRG
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–162   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 will be 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–163   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.3.3.18 Receipt History Purge

This transaction deletes receipts previously archived by the Receipt
Purge. See

Any enterprise using the Yantra 7x Application Consoles must schedule
purge transactions.

> **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–164   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–165   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.
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 will be 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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–166   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.3.3.19 Receipt Purge

This purge removes receipt data from the system. This reduces load from the 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.3.3.18, "Receipt History Purge" on page 309. 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 Yantra 7x Application Consoles must schedule purge transactions.

> **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–167   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–168   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 will be 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–169   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.3.3.20 Reprocess Error Purge
This purge deletes reprocess errors from the system. This reduces load from the frequently accessed tables. It purges records in YFS_ REPROCESS_ERROR tables that meet the following criteria:

- YFS_REPROCESS_ERROR records with State = Fixed or Ignored are processed.

- The last modified time should be earlier than the lead time setup.

> **Note:** This purge only reads the rules defined by the hub. Enterprise overridden rules are not considered.

Any enterprise using the Yantra 7x Application Consoles must schedule purge transactions.

Attributes
The following are the attributes for this time-triggered transaction:

Table A–170   Reprocess Error Purge Attributes

Attribute	Value
Base Transaction ID	REPROCESSPRG
Base Document Type	General

Table A–170   Reprocess Error Purge Attributes

Attribute	Value
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–171   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 will be 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–172   Reprocess Error Purge Statistics

Statistic Name	Description
NumReprocessErrsPurged	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.3.3.21 Reservation Purge

This purge deletes expired inventory reservations from the system. This reduces load from the frequently accessed tables as well as free up demands that are consumed by expired reservations. It purges records in YFS_INVENTORY_RESERVATION tables that meet the following criteria:

- Records with EXPIRATION_DATE earlier than current date.

Any enterprise using the Yantra 7x Application Consoles must schedule purge transactions.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–173   Reservation Purge Attributes

Attribute	Value
Base Transaction ID	RESERVATIONPRG
Base Document Type	General
Base Process Type	General
Abstract Transaction	No

Table A–173   Reservation Purge Attributes

Attribute	Value
APIs Called	None
User Exits Called	None

Criteria Parameters

The following are the criteria parameters for this transaction:

Table A–174   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.
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 will be 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–175   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.3.3.22 Shipment History Purge

This transaction deletes shipments previously archived by the Shipment Purge. See

Any enterprise using the Yantra 7x Application Consoles 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

Attributes

The following are the attributes for this time-triggered transaction:

Table A–176   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–177   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 will be 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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–178   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_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.3.3.23 Shipment Purge

This purge removes shipment data from the system. This reduces load from the 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.3.3.22, "Shipment History Purge" on page 317. 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. All orders in the shipment should have been purged.

The shipment should have been made before the lead time setup.

Any enterprise using the Yantra 7x Application Consoles 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.2.8, "Close Shipment" on page 211.

A shipment is picked up for purge if it meets the following criteria:

1. The shipment's last modification should fall before the lead time setup.

2. If the value of ShipmentClosedFlag field is set to "Y".

3. The order record should already be purged for all the shipment lines.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–179   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–180   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.

Table A–180   Shipment Purge Criteria Parameters

Parameter	Description
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 will be 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–181   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_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_TAG_SERIALS

YFS_SHIPMENT_LINE

YFS_SHIPMENT_LINE_REQ_TAG

YFS_ACTIVITY_DEMAND

YFS_CONTAINER_STS_AUDIT

YFS_CONTAINER_ACTIVITY

A.3.3.24 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 a application server restart.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–182   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–183   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 will be 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 Parameters

The following are the statistics parameters for this transaction:

Table A–184   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.3.3.25 Statistics Purge

This purge removes statistics data from the system. It purges all records older than the specified retention days.

> **Note:**   This purge only reads the rules defined by the hub. Enterprise overridden rules are not considered.

> **Note:**   Yantra recommends that this agent be run often. In a production environment, the YFS_STATISTICS_DETAIL table can grow very large, very quickly. It does not carry any old data, therefore it is a good practice to purge it aggressively, from once a day to once a week, depending on the table size.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–185   Statistics Purge Attributes

Attribute	Value
Base Transaction ID	STATTBLPRG
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–186   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.
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 will be 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–187   Statistics Purge Statistics

Statistic Name	Description
NumStatisticsPurged	Number of statistics purged

Pending Job Count

For this transaction the pending job count is the number of records that can be purged from the YFS_STATISTICS_DETAIL table.

Events Raised

None.

Tables Purged

YFS_STATISTICS_DETAIL

A.3.3.26 Work Order History Purge

This transaction deletes tasks previously archived by the Work Order Purge. See the Section A.3.3.27, "Work Order Purge" on page 329.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–188   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–189   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 will be 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 will 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 Platform > System Administration > Agent Criteria Groups.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–190   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_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.3.3.27 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.

Attributes
The following are the attributes for this time-triggered transaction:

Table A–191   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–192   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 will be 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–192   Work Order Purge Criteria Parameters

Parameter	Description
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 will 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 Platform > System Administration > Agent Criteria Groups.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–193   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_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 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

> **Note:** Some of the statistics collected and tracked in Release 7.5 SP1 for time-triggered transactions, monitors, and integration and application servers may change with the next release of Yantra.

A.4.1 Load Execution Task Queue Syncher

This transaction synchronizes the task queue for the load execution process type.

Attributes

The following are the attributes for this time-triggered transaction:

Table A−194   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−195   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–196   Load Execution Task Queue Syncher Statistics

Statistic Name	Description
NumTasksCreated	Number of tasks created.

Pending Job Count

None.

Events Raised

None.

A.4.2 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–197   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–198   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–199   Order Delivery Task Queue Syncher Statistics

Statistic Name	Description
NumTasksCreated	Number of tasks created.

Pending Job Count

None.

Events Raised

None.

A.4.3 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–200   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

Table A–200   Order Fulfillment Task Queue Syncher Attributes

Attribute	Value
Abstract Transaction	No
APIs Called	None

Criteria Parameters

The following are the criteria parameters for this transaction:

Table A–201   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–202   Order Fulfillment Task Queue Syncher Statistics

Statistic Name	Description
NumTasksCreated	Number of tasks created.

Pending Job Count

None.

Events Raised

None.

A.4.4 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–203   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–204   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–205   Order Negotiation Task Queue Syncher Statistics

Statistic Name	Description
NumTasksCreated	Number of tasks created.

Pending Job Count

None.

Events Raised

None.

A.5 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 7.5 SP1 for time-triggered transactions, monitors, and integration and application servers may change with the next release of Yantra.

> **Note:** All Monitors with the exception of Negotiation and Old Order have a `CollectPendingJobs` criteria parameter. If this parameter is set to `N`, the agent will not collect information on the pending jobs for that monitor. This pending job information is used for monitoring the monitor in the *Yantra 7x System Management Guide*.
>
> 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.5.1 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–206   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–207   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.

Statistics Tracked

None.

Pending Job Count

None.

Events Raised

No events are raised. Individual actions associated with the monitoring rule are executed.

Data published to the actions is AVAILABILITY_MONITOR_dbd.txt.

A.5.2 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 Yantra 7x Configurator. 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–208   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–209   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–210   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.
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 executed.

A.5.3 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 *Yantra 7x Inventory Synchronization Configuration Guide*.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–211   Inventory Monitor Attributes

Attribute	Value
Base Transaction ID	INVENTORY_MONITOR
Base Document Type	General
Base Process Type	General
Abstract Transaction	No
APIs Called	`checkAvailability()`

Criteria Parameters

The following are the criteria parameters for this monitor:

Table A–212   Inventory Monitor Criteria Parameters

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.

Table A–212   Inventory Monitor 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.
InventoryOrganizationCode	Optional. Valid inventory owner organization. Organization to process in this run. If not passed, all inventory organizations are processed.

Statistics Tracked
None.

Pending Job Count
None.

Events Raised
No events are raised. Individual actions associated with the monitoring rule are executed.

Data published to the actions is `<YFS_HOME>`/documentation/api_ javadocs/dbd/INVENTORY_MONITOR_dbd.txt.

A.5.4 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–213   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–214   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.
Status	The negotiation status you are monitoring.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–215   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.5.5 Order Monitor

This time-triggered transaction alerts the enterprise when an order remains in a particular status for a specific amount of time.

Use this monitor if you care to track how long orders stay in a particular state.

This transaction is deprecated for this release.

> **Note:** The same relog interval is used for all document types.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–216   Order Monitor Attributes

Attribute	Value
Base Transaction ID	ORDER_MONITOR
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–217   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.
Status	Optional. The order status you want to monitor (if not monitoring a status range).
LeastAge1	This field is not used in this version.
FromStatus	Optional. Statuses to monitor that are greater than or equal to the passed status (if not monitoring a specific status).
ToStatus	Optional. Statuses to monitor that are less than or equal to the passed status (if not monitoring a specific status).

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–218   Order Monitor Statistics

Statistic Name	Description
NumOrdersProcessed	Number of orders processed.
NumOrdersRequiringAlert	Number of orders which have at least one alert raised.

Pending Job Count

None.

Events Raised

No events are raised. Individual actions associated with the monitoring rule are executed.

Data published to the actions is `ORDER_MONITOR_dbd.txt`.

A.5.6 Enhanced Order Monitor

The enhanced order 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 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

- 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 *Yantra 7x Distributed Order Management Configuration Guide*, *Yantra 7x Supply Collaboration Configuration Guide*, and/or *Yantra 7x 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 details on the Close Order time-triggered transaction, see Section A.2.6, "Close Order" on page 207.

> **Note:** The same relog interval is used for all document types.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–219   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–220   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.

Statistics Tracked

The following statistics are tracked for this monitor:

Table A–221   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–222   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: <YFS_HOME>/documentation/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.

A.5.7 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 *Yantra 7x Distributed Order Management Configuration Guide*, *Yantra 7x Supply Collaboration Configuration Guide*, and/or *Yantra 7x 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 details on the Close Order time-triggered transaction, see Section A.2.6, "Close Order" on page 207.

> **Note:** The same relog interval is used for all document types.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–223   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–224   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.

Statistics Tracked

The following statistics are tracked for this monitor:

Table A–225   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 executed.

The data published is RETURN_MONITOR_EX.xml.

A.5.8 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 in between thresholds defined in the Yantra 7x Configurator, in the Inventory Synchronization 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 will be used for considering inventory availability at retrieval time. For more information on future inventory availability, refer to the *Yantra 7x Inventory Synchronization Configuration Guide*.

Inventory available at the current date will be considered as on-hand. The processing time in the ATP rules must be set to at least 1 day, else past due supply will be included as part of on-hand inventory. For more information on configuring ATP Rules, refer to the *Yantra 7x Inventory Synchronization Configuration Guide*.

Demand of type OPEN_ORDER will be 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 on configuring distribution groups and node-level inventory monitoring, refer to the *Yantra 7x Inventory Synchronization Configuration Guide*.

Inventory items without an Availability Monitor rule, or with a rule that is disabled, will not be processed by this time-triggered transaction.

If configured, the Real-time Availability Monitor will also consider the on hand and future inventory availability safety factor during monitoring. For more information on inventory availability safety factors and the `findInventory()` API, refer to the *Yantra 7x Inventory Synchronization Configuration Guide*, and the *Yantra 7x Javadocs*.

When the on hand quantity is greater than the configured low threshold, the `REALTIME_ONHAND` alert type is raised, and the alert level is based on the on hand quantity.

When the on hand 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 `FirstFutureAvailabeDate` 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 will 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 will be 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–226   Real-time Availability Monitor Attributes

Attribute	Value
Base Transaction ID	REALTIME_ATP_MONITOR
Base Document Type	General
Base Process Type	General

Table A–226   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–227   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 in 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 will be monitored).
	If not provided default value is `1`.

Table A–227   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 will only be used when `MonitorOption` is passed as `2` or `3`. If provided, only items with the matching statuses will be monitored.
FromAlertTimestamp	This will only be used when `MonitorOption` is passed as `2`. If provided, the agent will raise 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 will be 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 on passing these attributes see scheduling time-triggered transaction in *Yantra 7x Installation Guide*.
FromLastNumberOfHours	This will only be 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.

Statistics Tracked

None.

Pending Job Count

None.

Events Raised

The following events are raised by this time-triggered transaction:

Table A–228   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: <YFS_HOME>/documentation/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.5.9 Shipment Monitor

This time-triggered transaction reports on the states of a shipment, based on rules in the YFS_MONITOR_RULE table. This transaction allows 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

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 *Yantra 7x Distributed Order Management Configuration Guide*, *Yantra 7x Supply Collaboration Configuration Guide*, and/or *Yantra 7x Reverse Logistics Configuration Guide*.

Attributes
The following are the attributes for this time-triggered transaction:

Table A–229   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–230   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–231   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

A.5.10 Work Order Monitor

This time-triggered transaction alerts the enterprise when a work order remains in a particular state for a specific amount of time.

Use this monitor if you care to track how long work orders stay in a particular state.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–232   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–233   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.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–234   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 executed. Data published to the actions is workOrder_dbd.txt.

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