



Inventory Synchronization User Guide

Release 7.5 SP1

May 2006



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Inventory Synchronization User Guide, Release 7.5 SP1

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Preface

Intended Audience

This manual is intended to provide assistance to users when accessing information about inventory synchronization.

Structure

This manual contains the following sections:

Chapter 1, "Inventory Synchronization Overview"

This chapter describes the consoles available within the Inventory Synchronization application's user interface.

Chapter 2, "Creating Supplemental Capacity"

This chapter explains the task of creating supplemental capacity for a given time period.

Chapter 3, "Managing Count"

This chapter explains the tasks of creating and managing count requests.

Chapter 4, "Inventory Console Screens"

This chapter provides the field level descriptions of the Inventory Console screens.

Chapter 5, "Adjust Inventory Console Screens"

This chapter provides the field level descriptions of the Adjust Inventory Console screens.

Chapter 6, "Capacity Console Screens"

This chapter provides the field level descriptions of the Capacity Console screens.

Chapter 7, "Create Work Order Screens"

This chapter provides the field level descriptions of the Create Work Order screens.

Chapter 8, "Work Order Console Screens"

This chapter provides the field level descriptions of the Work Order Console screens.

Chapter 9, "Create Corporate Count Request Screens"

This chapter provides the field level descriptions of the Create Corporate Count Request screens.

Chapter 10, "Count Console Screens"

This chapter provides the field level descriptions of the Count Console screens.

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*
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- *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.

Convention	Meaning
< >	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.

Inventory Synchronization Overview

Inventory Synchronization enables access to supply, demand, and availability information. The *Yantra 7x Product Concepts* introduces concepts regarding inventory synchronization. This document builds on that guide and explains how to use the Inventory consoles to implement inventory synchronization.

The Inventory Synchronization module consists of the following components:

- **Inventory Console** - enables you to view item inventory details, reservations, and associated items. You can also adjust the inventory for an item at a node and look up item availability. The screen level information is explained in [Chapter 4, "Inventory Console Screens"](#).
- **Adjust Inventory** - enables you to make adjustments to inventory as needed. The screen level information is explained in [Chapter 5, "Adjust Inventory Console Screens"](#).
- **Capacity Console** - enables you to track delivery services and provided services for your resource pools. You can also set and override standard capacity and set standard capacity periods. The screen level information is explained in [Chapter 6, "Capacity Console Screens"](#).
- **Create Work Order** - enables you to create a work order for Value Added Service activities. The screen level information is explained in [Chapter 7, "Create Work Order Screens"](#).
- **Work Order Console** - enables you to view information about work orders. The screen level information is explained in [Chapter 8, "Work Order Console Screens"](#).

- **Create Corporate Count Request** - enables you to create corporate count requests for all nodes, a specific node, or all nodes in a region. The screen level information is explained in [Chapter 9, "Create Corporate Count Request Screens"](#).
- **Count Console** - enables you to view information about corporate count requests and count requests. The screen level information is explained in [Chapter 10, "Count Console Screens"](#).

Part I

Inventory Tasks

The chapters in this section provide an in-depth explanation of the various tasks that can be performed in the Inventory Synchronization console screens.

This section contains the following chapters:

- [Creating Supplemental Capacity](#)
- [Managing Count](#)

Creating Supplemental Capacity

When managing capacity and planning for future service requests, you may want to look ahead to a given week where requests are expected to be high, and create supplemental capacity that can be used for that week.

Supplemental capacity can be configured to be used by default for certain preferred customers, or it can be considered on a case by case basis when taking work order appointments.

Creating supplemental capacity is accomplished by:

1. [Searching for Available Capacity](#)
2. [Viewing Available Capacity](#)
3. [Creating Supplemental Capacity](#)

2.1 Searching for Available Capacity

Look for available capacity for a given time period:

1. From the navigation bar, click select Inventory > Capacity Console. The [Capacity Search](#) screen is displayed.
2. Fill in the search criteria as applicable. Refer to the [Capacity Search](#) table for field-value description.
3. Check `Show Availability Expanded`, so that supplemental capacity is displayed by default on the [Capacity Details](#) screen.
4. Once you've entered all of the applicable information, click Search. This takes you to the [Capacity Details](#) screen.

2.2 Viewing Available Capacity

The [Capacity Details](#) screen shows you the resource pool's available capacity for the specified time slots and day of week within the requested period of time.

If you didn't check [Show Availability Expanded](#) on the [Capacity Search](#) screen, click the + icon in the time slot row for which you view capacity so that you can view the supplemental capacity.

2.3 Creating Supplemental Capacity

To create supplemental capacity:

1. Go to the Supplemental Capacity row for each time slot.
2. For each day of the week, enter the amount of supplemental capacity that should be made available to that resource pool.
3. When you are done adding supplemental capacity for each day, click Save.

Managing Count

Products or product categories may be put on count on a regular or on an ad hoc basis to validate the inventory accuracy of products.

The count tasks that are explained in detail are:

- [Putting an Item or Item Category on Count](#)
- [Managing Count Requests](#)

3.1 Putting an Item or Item Category on Count

You can put an Item or Item Category on Count from the [Create Corporate Count Request](#) Screen.

You can navigate to that screen using the following steps:

1. From the navigation bar, choose Inventory > Create Corporate Count Request. The [Create Corporate Count Request](#) screen is displayed.
2. Enter the information in the applicable fields.

Note: An item or item category may be put on count only if an enterprise has been chosen.

3. Choose the nodes to be put on count:
 - **To create a count request for all nodes:** In the Create Count Request For field, choose All Nodes.
 - **To create a count request for a specific node:** In the Create Count Request For field, choose Specific Node, and click the node lookup. See [Choosing a specific node](#).

- **To create a count request for all nodes in a region:** In the Create Count Request For field, choose All Nodes in Region, and click region lookup. See [Choosing a specific region](#).
- 4. Choose the item or item category that needs to be put on count:
 - **To put an item on count:** Choose By Item, and enter relevant item information.
 - **To put an item classification on count:** Choose By Item Classification, and enter relevant item classification information.
- 5. Choose Create. The new corporate count request is displayed in the [Corporate Count Request Details](#) screen.

3.1.1 Choosing a specific node

To choose a specific node for creating a count request:

1. From the [Create Corporate Count Request](#) screen, click the node lookup appearing next to the Specific Node field. The Node search window appears.
2. Enter the applicable search parameters, and choose Search.
3. The Node List screen is displayed with the search results.
4. Choose the relevant Node by clicking the respective 'Click to select' icon. This selection is reflected for the Specific Node field in the [Create Corporate Count Request](#) screen.

3.1.2 Choosing a specific region

To choose all nodes in a specific region for creating a count request:

1. From the [Create Corporate Count Request](#) screen, click the region lookup appearing next to the All Nodes in Region field. The Region search window appears.
2. Enter the applicable search parameters, and choose Search.
3. The Region List screen is displayed with the search results.
4. Choose the relevant Region by clicking the respective 'Click to select' icon. This selection is reflected for the All Nodes in Region field in the [Create Corporate Count Request](#) screen.

3.2 Managing Count Requests

The count requests generated at a corporate level and the count requests generated at the node level are managed differently.

This section explains:

- [Managing Corporate Count Requests](#)
- [Managing Node Level Count Requests](#)

3.2.1 Managing Corporate Count Requests

You can manage the existing corporate count requests from the [Corporate Count Request List](#) screen.

You can navigate to that screen using the following steps:

1. From the navigation bar, choose Inventory > Count Console. The [Corporate Request Search By All Attributes](#) screen is displayed.
2. Enter the applicable search parameters, and choose Search. The [Corporate Count Request List](#) screen is displayed.
3. Select the relevant Corporate Count Requests, and choose the appropriate action:
 - **To View Corporate Count Request Details:** Choose View DETAILS to view the details of the selected Corporate Count Requests. The [Corporate Count Request Details](#) screen is displayed. From this screen you can View Node Requests generated at the corporate level.
 - **To Cancel Corporate Count Requests:** Choose Cancel to cancel the selected Corporate Count Requests. The [Cancellation Reason](#) screen is displayed.

3.2.2 Managing Node Level Count Requests

You can manage the existing count requests from the [Count Request List](#) screen.

You can navigate to that screen using the following steps:

1. From the navigation bar, choose Inventory > Count Console.
2. Navigate to the [Count Request Search By Count Request Attributes](#) screen OR the [Count Request Search By Count Criteria](#) screen.

3. Enter the applicable search parameters, and choose [Search](#). The [Count Request List](#) screen is displayed.
4. Select the relevant Count Requests, and choose the appropriate action:
 - **To View Count Request Details:** Choose [View Details](#) to view the details of the selected Count Requests. The [Count Request Details](#) screen is displayed. From this screen, you can [Accept Variance](#) in the inventory.
 - **To Cancel Count Requests:** Choose [Cancel](#) to cancel the selected Count Requests. The [Cancellation Reason](#) screen is displayed to capture the reason for cancelling the request.

Part II

Inventory Synchronization Screen Reference

The chapters in this section provide screen and field descriptions for all Inventory Synchronization screens.

This section contains the following chapters:

- [Inventory Console Screens](#)
- [Adjust Inventory Console Screens](#)
- [Capacity Console Screens](#)
- [Create Work Order Screens](#)
- [Work Order Console Screens](#)
- [Create Corporate Count Request Screens](#)
- [Count Console Screens](#)



Inventory Console Screens

This chapter provides screen and field descriptions for all Inventory Console screens.

4.1 Inventory Items Search By Item


You can perform a search for a single inventory item with constraints on the Organization, Item ID, Product class and Unit of Measure or multiple inventory items with lesser or no constraints.

Note: Items are listed only for the organization's inventory consolidator. If you are logged in as a Hub, the list only displays the items the Hub owns. When logged in as a Hub, you can query on another organization's inventory items by using the Enterprise Code search criteria.

Note: Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 4–1 *Inventory Items Search By Item*

Fields	
Organization	If you are a Hub organization, enter the organization that owns the inventory item list with which you want to work.
Item ID	Enter the Item ID of the items you are searching for, if applicable.
Product Class	Select the product class of the items you are searching for, if applicable.
Unit of Measure	Select the unit of measure of the items you are searching for, if applicable.
Max Records	Enter the maximum number of items you want listed as a result of your search.

The [Inventory List](#) screen is displayed based on the information entered for the inventory item search. You can further restrict the search options by clicking the  search icon.

4.2 Inventory List

The Inventory List window displays the results of an inventory search. You can perform actions on a single inventory item or multiple inventory items by selecting the check boxes of the inventory items you want to

perform an action on and choosing the applicable action from the action bar. Refer to the [Inventory List](#) table for assistance.

Table 4–2 Inventory List

Actions	
View Details	This action button takes you to the Inventory Summary screen for the selected inventory items.
View Reservations	This action button takes you to the Inventory Reservations screen for the selected inventory items.
View Associated Items	This action button takes you to the Associated Items List for the selected inventory items.
View Pending Adjustments	This action button takes you to the Pending Adjustments List for the selected inventory items.
Adjust Inventory	This action button takes you to the Adjust Inventory Detail screen so that you can make adjustments to the inventory for the selected items.
ATP Options	This action button takes you to the Availability to Promise (ATP) Options Search By All Attributes screen. The search criteria is pre-populated with the selected inventory Item ID.
Fields	
Item ID	The item ID. Click this link to view the inventory summary for the item ID.
PC	The item's product class.
UOM	The item's unit of measure.
Description	A brief description of the item.

4.3 Inventory Summary

The Inventory Summary screen enables you to view information about an item, including general item information, an item's total supply and demand, and item availability.

The view icons and actions allows you to view different types of information for the specified inventory item.

Table 4–3 *Inventory Summary Screen, Item Information*






View Icons	
	Reservations - This icon takes you to the Inventory Reservations screen which displays any reservations for the specified inventory item.
	Ship Nodes - This icon takes you to the Ship Nodes screen which displays information pertaining to the nodes from which the specified inventory item is shipped.
	Audit - This icon takes you to the Inventory Audit List which provides audit activity information pertaining to the specified inventory item.
	Associated Items - This icon takes you to the Associated Items List which lists any items associated with the specified inventory item for substitution, cross-sell or up-sell purposes.
	Pending Adjustments - This icon takes you to the Pending Adjustments List which lists any inventory adjustments that are pending for the specified inventory item.
Actions	
Adjust Inventory	This action button takes you to the Adjust Inventory Detail screen so that you can make adjustments to the inventory for the selected items.
ATP Options	This action button takes you to the Availability to Promise (ATP) Options Search By All Attributes screen. The search criteria is pre-populated with the selected inventory Item ID.
Fields	
Organization Code	The organization associated with the inventory.
Item ID	The item ID.
Product Class	The item's classification, such as first quality, second quality, or finished good.
Unit of Measure	The item's unit of measure.
Tracked Everywhere	Displays Y if inventory is tracked at all nodes. Displays N if some ship nodes are configured on the system as INFINITE inventory nodes and therefore actual inventory information is not available.

Table 4–3 Inventory Summary Screen, Item Information

Description	Description of the item.
Lead Days	The amount of time (in days) needed to procure the item and make it available for shipping.
Processing Days	The amount of time (in days) it takes for an item to be received by a Seller and made ready for shipment.
Expired Supply	If the item is time sensitive, this field displays the total amount of inventory across the inventory consolidator that is expired based upon its ship by date.
Consider All Nodes	Select Consider All Nodes to see the item's availability picture across all nodes in your inventory consolidation. For more information about inventory consolidation, see the <i>Yantra 7x Inventory Synchronization Configuration Guide</i> .
Distribution Rule	<p>Choose Distribution Rule and select a specific rule to see the availability picture across that distribution. A distribution rule establishes the ship node determination process. It determines the default nodes that an item should be sourced from based on priority.</p> <p>For example, if you source the same item from multiple ship nodes, but have to set one of the ship nodes as the primary distributor of the item, you may create a distribution rule in the Configurator assigning that particular source node with the highest priority for shipping the item. For more information about distribution rules, see the <i>Yantra 7x Inventory Synchronization Configuration Guide</i>.</p>
Segmentation	<p>All Inventory - Displays quantity of segmented (set aside in order to fulfill demand from designated customers) and unsegmented items.</p> <p>Unsegmented Inventory - Enables display of items that have not been designated as segmented.</p> <p>Consider Segment Type - Choose the type of segmentation (MTC or MTO) and enter the Segment name. Segment is defined at the time of order creation or inventory adjustment.</p>
Horizon End Date	Enter the date up to which you want supply, demand, and availability to be calculated.

Table 4–4 Inventory Summary Screen, Supply


<div><div><div>Supply</div><div>Total inventory expected at the node, through the date entered in Horizon End Date.</div><div>Supply is calculated through the date entered in Horizon End Date.</div><div>The supply breakdown is displayed here in both a pie chart and a tabular view depicting the types of supply and how much supply there is across all nodes.</div></div><div><div><table><thead><tr><th>Supply Type</th><th>Quantity</th></tr></thead><tbody><tr><td>ONHAND</td><td>1,870</td></tr><tr><td>HELD</td><td>25</td></tr></tbody></table></div></div></div>		Supply Type	Quantity	ONHAND	1,870	HELD	25
Supply Type	Quantity						
ONHAND	1,870						
HELD	25						
Supply Type	The type of inventory supply of the item. For example, ONHAND, HOLD are valid supply types.						
Quantity	The quantity of the supply type. Click this link to view the Supply Type Details .						

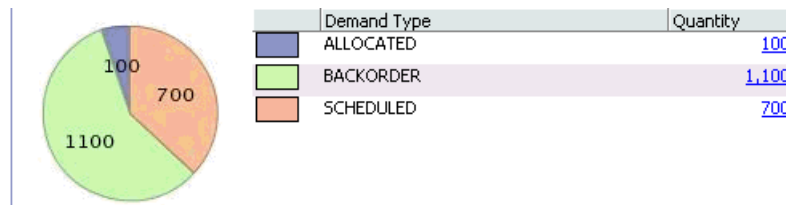
Table 4–5 Inventory Summary Screen, Demand

Demand

The amount of inventory that becomes outgoing due to reservations and orders.

Demand is calculated through the date entered in Horizon End Date.

The demand breakdown is displayed here in both a pie chart and a tabular view depicting the types of demand and how much demand there is across all nodes.

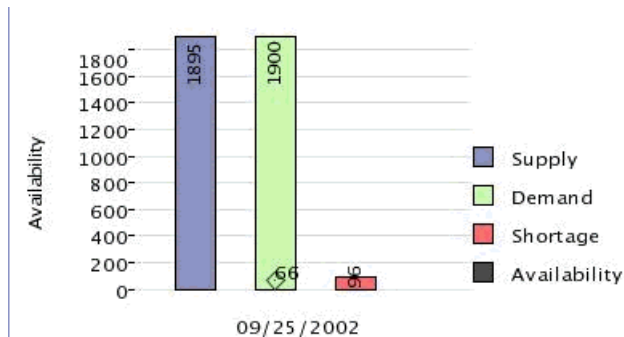


Demand Type	The type of inventory demand of the item. For example, ALLOCATED, OPEN ORDER are valid demand types.
Quantity	The quantity of the demand type. Click this link to view the Demand List .

Table 4–6 Inventory Summary Screen, Available**Available**

The availability graph displays actual item availability at the ship node, taking available-to-promise rules, into consideration. The graph displays the following:

- Supply - Total inventory expected.
- Demand - The amount of incoming inventory that becomes outgoing due to reservations and orders.
- Shortage - Any actual shortage after supply, demand, and available-to-promise rules have been applied.
- Availability - The actual amount available after supply, demand, and available-to-promise rules have been applied.

**Fields**

Availability View	<p>Select All to view a graph displaying the entire availability picture through the date entered in Horizon End Date.</p> <p>Select Weekly to view a week-by-week availability picture through the date entered in Horizon End Date.</p> <p>Select Monthly to view a month-by-month availability picture through the date entered in Horizon End Date.</p>
Availability	This is a tabular view of the information displayed in the Item ATP Info graph.
Start Date	Date range starting from today.
End Date	Date arrived at dependant of whether you chose All, Weekly, or Monthly from Availability.

Table 4–6 Inventory Summary Screen, Available

Supply	<p>Total inventory expected during the start and end date range. Click the expand button to view the supply type distribution of inventory.</p> <table> <tr> <td>Supply Type</td><td>The type of inventory supply of the item. For example, ONHAND, INTRANSIT are valid supply types.</td></tr> <tr> <td>Quantity</td><td>The quantity of the supply type. Click this link to view the Supply Type Details.</td></tr> </table>	Supply Type	The type of inventory supply of the item. For example, ONHAND, INTRANSIT are valid supply types.	Quantity	The quantity of the supply type. Click this link to view the Supply Type Details .
Supply Type	The type of inventory supply of the item. For example, ONHAND, INTRANSIT are valid supply types.				
Quantity	The quantity of the supply type. Click this link to view the Supply Type Details .				
Demand	<p>Total inventory leaving during the fulfillment process between the start and end date range. Click the expand button to view the supply type distribution of inventory.</p> <table> <tr> <td>Demand Type</td><td>The type of inventory demand of the item. For example, ALLOCATED, OPEN ORDER are valid demand types.</td></tr> <tr> <td>Quantity</td><td>The quantity of the demand type. Click this link to view the Demand List.</td></tr> </table>	Demand Type	The type of inventory demand of the item. For example, ALLOCATED, OPEN ORDER are valid demand types.	Quantity	The quantity of the demand type. Click this link to view the Demand List .
Demand Type	The type of inventory demand of the item. For example, ALLOCATED, OPEN ORDER are valid demand types.				
Quantity	The quantity of the demand type. Click this link to view the Demand List .				
Available	The actual amount available between the start and end date range after supply, demand, and available-to-promise rules have been applied.				
Shortage	Any actual shortage between the start and end date range after supply, demand, and available-to-promise rules have been applied.				

4.4 Availability to Promise (ATP) Options Search By All Attributes

Inventory optimization occurs when you fine tune the amount of available inventory according to the orders you expect to receive. The concept of “lead + processing time” helps you to optimize inventory.

Consider an item with 20 units available in the warehouse ready for shipping. Suppose an order arrives to ship 20 units of that item 12 days from now.

Suppose a different customer asks if you can accept an order for 10 units to ship six days from now. Should you accept this order? In other words, do you have 10 units available to promise (ATP) six days from now?

To answer this question, it is helpful to have additional information, which includes the following:

- Lead time – The time required to obtain the item from your suppliers or manufacturers if you were to place a new purchase order today.
- Inbound processing time – The time required to process a supply after it has arrived in your node.
- Outbound processing time – The time required for your node to assemble an item, perform any value-added services, and physically ship the item.

The sum of these three parameters for an item is known as lead + processing time. Within the lead + processing time, you can expect to submit a purchase order to your supplier, receive the supply into your node, process the item, and ship it out. Therefore, demands with expected fulfillment dates beyond the lead + processing time can be fulfilled irrespective of your current inventory situation.

To return to the example, you can accept the order for 10 units if the lead + processing time allows you to fill both the order for 10 units six days from now and the order for 20 units 12 days from now.

You can search for an item’s availability across a specified set of criteria and create orders from the available list of options. Refer to the [ATP Options Search By All Attributes](#) table for descriptions of the various fields.

Note: Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 4–7 ATP Options Search By All Attributes

Fields	
Organization	If you are a Hub organization, enter the organization that owns the inventory item list with which you want to work.
Item ID	Enter the item ID of the items whose availability options you want to view, this field is mandatory.
Product Class	Select the product class of the items whose availability options you want to view, if applicable.
Unit of Measure	Select the unit of measure of the items whose availability options you want to view, if applicable.
Quantity	Enter the quantity of the item you are looking to be available.
Distribution Group	Enter the distribution group associated with the items whose availability options you want to view, if applicable.
Ship Node	Enter the ship node location of the items whose availability options you want to view, if applicable.
Receiving Node	Enter the receiving node location of the items whose availability options you want to view, if applicable.
Delivery Date/Ship Date	Enter the delivery/ship date range of the items whose availability options you want to view, if applicable.
Carrier/Service	Enter the carrier or carrier service used to ship the items whose availability options you want to view, if applicable.
Scheduling Rule	Select the scheduling rule used to schedule the items whose availability options you want to view, if applicable.
Minimum Fill Quantity	Enter the minimum quantity of the item necessary to fulfill the order, if applicable.

Table 4–7 ATP Options Search By All Attributes

Fields	
Segment Type	Select the type of segment: <ul style="list-style-type: none"> • MTC - Made to Customer • MTO - Made to Order
Segment	Segment is defined at the time of order creation or inventory adjustment.
Fulfillment Type	Select the fulfillment type used when scheduling the items, if applicable.
Check Inventory	Select if you want to consider inventory during the search, if applicable.
Ignore Unpromised Demand	Select if you want to ignore unpromised demand during the availability search, if applicable.
Ignore Promised Demand	Select if you want to ignore promised demand during the availability search, if applicable.
Optimize On	Select if you want to optimize the availability search on the date available, your prioritized nodes, or the number of shipments the node is currently processing.
Max Records	Enter the maximum number of items you want listed as a result of your search.

The search results are displayed in [ATP Options List](#) screen.

4.5 ATP Options List

The ATP Options list screen displays a list of options from which you can create or fulfill an order.

Table 4–8 ATP Options List

Actions	
Create Order	This action takes you to the Order Creation from ATP Options screen for creating an order after viewing availability options.
Fields	
Item ID	The item ID

Table 4–8 ATP Options List

Product Class	The item's product class.
UOM	The item's unit of measure.
Distribution Rule	The distribution rule associated with the item.
Options	Each item available to promise that matches your search criteria displays in a separate table. To select an Option, choose the radio button associated with it.
Ship Node	The ship node the item is located at for this option.
Ship Date	The date the item can be shipped by with this option.
Delivery Date	The date the item can be delivered by with this option.
Node Priority	The node priority.
Quantity	The quantity of the item available based upon your search criteria with this option.

4.6 Order Creation from ATP Options

You can create an order from the list of available options.

Table 4–9 Order Creation from ATP Options List

Fields	
Document Type	Select the document type associated with the order you are creating.
Enterprise	Select the Enterprise associated with the order you are creating.
Buyer	Enter the Buyer associated with the order you are creating.
Seller	Enter the Seller associated with the order you are creating.
Order #	Enter the order number of the order you are creating.
Order Type	Select the order type of the order you are creating. For example, Sales Order or Purchase Order.
Order Date	Enter the date you want the order to be created.

Table 4–9 Order Creation from ATP Options List

Fields	
Order Name	Enter the order name of the order you are creating.
Currency	Select the currency to be used with the order you are creating.

The `Create Order` action takes you to the Order Details screen for further processing. For more information on order details screen refer to *Yantra 7x Distributed Order Management User Guide*.

4.7 Inventory Audits Search By All Attributes

Inventory audits provide a means to view any modifications and actions that have been performed on an item. You can search for audits across items.

Note: Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 4–10 Inventory Audits Search By All Attributes

Fields	
Organization	If you are a Hub organization, enter the organization that owns the inventory item list with which you want to work.
Item ID	Enter the item ID of the items you are searching for, if applicable.
Product Class	Select the product class of the items you are searching for, if applicable.
Unit of Measure	Select the unit of measure of the items you are searching for, if applicable.
Ship Node	Enter the ship node you want to search for audits against, if applicable.

Table 4–10 Inventory Audits Search By All Attributes

Fields	
Activity Date	Enter the date range through which you want to search for inventory audits, if applicable.
Max Records	Enter the maximum number of audits you want listed as a result of your search.

The inventory audits search screen results in the [Inventory Audit List](#).

4.8 Inventory Audit List

The Inventory Audit List window displays the results of an inventory audit search. You can perform actions on a single inventory audit or multiple inventory audits by selecting the check boxes of the inventory audits you want to perform an action on and choosing the applicable action from the action bar. Refer to the [Inventory Audits List](#) table for assistance.

Table 4–11 Inventory Audits List

Action	
View Details	This action takes you to the Inventory Audit Details screen to view the details of the selected audits.
Fields	
Activity Date	The date the transaction was performed on the item. You can click this link to view the details of the inventory audit.
Item ID	The item ID.
PC	The item's product class.
UOM	The item's unit of measure.
Transaction Type	The transaction performed on the item.
Ship Node	The ship node the item was located at.
Quantity	The quantity of the item that was modified.

4.9 Inventory Audit Details

The inventory audit detail window displays the details of the audits of an inventory item.

Table 4–12 Item Information

Fields	
Item ID	The item identifier.
Product Class	The item's classification, such as first quality, second quality, or finished good. Orders for items are placed against this classification.
Unit of Measure	The item's unit of measure.
Description	A brief description of the item.

Table 4–13 Inventory Audit Details Screen, Audit Details

Fields	
Activity Date	The date any activity was performed on the inventory.
Modified By	The user that performed the action on the inventory.
Transaction Type	The type of action that was performed on the inventory.
Supply Type	The supply classification. For example on-hand supply and reserved supply.
Quantity	Any increase or decrease in inventory quantity.
Unit Cost	Any increase or decrease in the unit cost of the the inventory item.
Ship Node	The ship node the inventory action took place.
Ship By Date	The ship by date of the inventory the action was performed on.
Segment Type	Choose the type of segmentation from the drop-down list: MTC - Made to Customer MTO - Made to Order
Segment	Enter the segment name.
Reference #1	This field can be customized as needed.
Reference #2	This field can be customized as needed.
Reference #3	This field can be customized as needed.

Table 4–13 Inventory Audit Details Screen, Audit Details

Fields	
Reference #4	This field can be customized as needed.
Reference #5	This field can be customized as needed.
Tag Identifiers	Displays the unique tag identifiers you have specified for the item (for example, Lot #).

Table 4–14 Inventory Audit Details Screen, Modification

Fields	
Reason Code	The reason the action was performed.
Reason Text	Any additional explanation as to why the action was performed.

4.10 Inventory Reservations

In Yantra 7x, demand is composed of different types of specific entities called “demands.” One type of demand is a reservation. How does one guarantee to a customer that inventory has been put on hold for the customer? One way is to create a reservation on the system, which the customer must confirm or cancel. A reservation is a quantity of an item that a customer places on hold with the intent to buy. This takes an amount of inventory out of available inventory to cater to a customer’s specific demand. A reservation can be upgraded to an order or it can be canceled.

You can view segments of inventory reserved by date for specific Buyer groups. Reservations are treated as demands against current supply. Reservation is Enterprise-driven to meet current demand, rather than Buyer-driven to satisfy specific orders.

Table 4–15 Item Information

Fields	
Item ID	The item identifier.
Product Class	The item’s classification, such as first quality, second quality, or finished good. Orders for items are placed against this classification.

Table 4–15 Item Information

Fields	
Unit of Measure	The item's unit of measure.
Description	A brief description of the item.

4.11 Add Reservation

Table 4–16 Inventory Reservations Screen, Reservation

Actions	
Add	This action takes you to the Add Reservation screen to add a reservation for the item information provided in the header panel.
Delete	This action deletes the selected inventory reservations.
Fields	
Reservation ID	The reservation's ID. This hyper link takes you to the Modify Reservation screen where you modify the reservation details.
Ship Node	The ship node the item reservation is made against.
Ship Date	The order's ship date for which the reservation can be used. Note: This field is not time zone sensitive. For more information about time zone sensitivity, see the <i>Yantra 7x Localization Guide</i> .
Reservation Date	The date the reservation was made.
Quantity	The quantity reserved.

The item level reservations can be added by selecting a reservation in the [Inventory Reservations](#) screen and clicking the Add action.

Table 4–17 Add Reservation

Fields	
Reservation ID	Enter an identifier for the reservation.
Ship Node	Enter the ship node you want to reserve the item at. This field is mandatory.

Table 4–17 Add Reservation

Fields	
Ship Date	Enter the order's ship date for which the reservation can be used.
Reservation Quantity	Enter the quantity of the item you want to reserve.

4.12 Modify Reservation

The item level reservations can be modified by selecting the Reservation ID link in the [Inventory Reservations](#) screen.

Table 4–18 Modifying a Reservation

Fields	
Reservation ID	The reservation's ID.
Ship Node	The ship node the item is reserved at.
Ship Date	The order's ship date for which the reservation can be used.
Quantity	The reserved quantity.
Increase by or Decrease by	Enter the number by which you want to increase or decrease the reserved quantity and click Save.

4.13 Pending Adjustment Search By All Attributes

If inventory is adjusted at a node that maintains inventory costs, a pending adjustment is created. A pending adjustment must be approved and posted for the actual adjustment to take effect.

A pending adjustment search is performed by including all the necessary attributes.

Note: Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 4–19 Pending Adjustments Search By All Attributes

Fields	
Organization	If you are a Hub organization, enter the organization that owns the inventory item list with which you want to work.
Item ID	Required. Enter the item ID of the item whose pending adjustments you want to view.
Product Class	Select the product class of the item whose pending adjustments you want to view, if applicable.
Unit of Measure	Select the unit of measure of the item whose pending adjustments you want to view, if applicable.
Ship Node	Enter the ship node location of the pending adjustments you want to view, if applicable.
Adjustment Date	Enter the date range through which you want to search for pending adjustments, if applicable.
Max Records	Enter the maximum number of audits you want listed as a result of your search.

The pending adjustments search results in the [Pending Adjustments List](#).

4.14 Pending Adjustments List

The Pending Adjustments list window displays the results of a pending adjustments search.

Table 4–20 Pending Adjustments List

Action	
Post Individual Adjustments	This action takes you to the Post Individual Adjustments screen for the selected pending adjustment items.

Table 4–20 Pending Adjustments List

Post Summed Adjustments	This action takes you to the Post Summed Adjustment screen for the selected pending adjustment items.
Fields	
Ship Node	The ship node the adjustment was made at.
Item ID	The item that was adjusted.
PC	The product class of the adjusted item.
UOM	The unit of measure of the adjusted item.
Description	A description of the adjusted item.

You can post individual or summed adjustments from this list screen.

4.15 Post Individual Adjustments

You can select pending adjustments and approve and post the individual adjustments made to an item. Once a pending adjustment is posted, it is reflected in the inventory picture. The field level description to post individual pending adjustments is given below:

Table 4–21 Item Information

Fields	
Item ID	The item identifier.
Product Class	The item's classification, such as first quality, second quality, or finished good. Orders for items are placed against this classification.
Unit of Measure	The item's unit of measure.
Description	A brief description of the item.

Table 4–22 Post Individual Adjustments Screen, Individual Adjustments

Fields	
Date	Enter the date the adjustment is to be posted.
Quantity	The quantity being adjusted.

Table 4–22 Post Individual Adjustments Screen, Individual Adjustments

Fields	
Account #	Enter the account number affected by the adjustment, if applicable.
Unit Cost	Enter the cost of the item being adjusted.
Currency	Select the currency of the Unit Cost.
Reference #1	This field is customizable based upon your business practices.
Reference #2	This field is customizable based upon your business practices.

4.16 Post Summed Adjustment

You can select pending adjustments and approve and post the total adjustments made to an item. Once a pending adjustment is posted, it is reflected in the inventory picture. The field level description to post summed pending adjustments is given below:

Table 4–23 Item Information

Fields	
Item ID	The item identifier.
Product Class	The item's classification, such as first quality, second quality, or finished good. Orders for items are placed against this classification.
Unit of Measure	The item's unit of measure.
Description	A brief description of the item.

Table 4–24 Post Summed Adjustments Screen, Individual Adjustments Panel

Fields	
Date	Enter the date the adjustment is to be posted.
Quantity	The quantity being adjusted.

Table 4–24 Post Summed Adjustments Screen, Individual Adjustments Panel

Fields	
Account #	Enter the account number affected by the adjustment, if applicable.
Unit Cost	Enter the cost of the item being adjusted.
Currency	Select the currency of the Unit Cost.
Reference #1	This field is customizable based upon your business practices.
Reference #2	This field is customizable based upon your business practices.

4.17 Associated Items List

You can view items that have been associated with a particular item in the Configurator. You can view items that can be cross-sold with the item, items that can be substituted for an item, and items that can be up-sold for an item.

Cross-Sell

A cross-sell promotes an add-on or accessory item that, when combined with the primary item, makes a “better” package.

Up-Sell

An up-sell promotes a more powerful or higher-level item.

Substitution

Setting up a substitution association provides the ability to recognize that an ordered item can be substituted with one or more other items.

Table 4–25 Item Information

Fields	
Item ID	The item identifier.
Product Class	The item’s classification, such as first quality, second quality, or finished good. Orders for items are placed against this classification.

Table 4–25 Item Information

Fields	
Unit of Measure	The item's unit of measure.
Description	A brief description of the item.

Table 4–26 Associated Item List Screen, Associated Items

Action	
View Details	This action takes you to the Inventory Summary screen for the selected associated items.
Fields	
Association Type	Select the association type you want to view. You can choose from Cross-Sell, Substitution, or Up-Sell.
Effective From	The date at which the particular association is effective.
Effective To	The date at which the particular association is no longer effective.
Item ID	The item ID of the item associated with the original item. Click on this hyper link to view the Inventory Summary screen for the associated item.
PC	The product class of the item associated with the original item.
UOM	The unit of measure of the item associated with the original item.
Description	A description of the item associated with the original item.
Quantity	The quantity of the item associated with the original item. For example, you might have an association where two smaller items can be substituted for one bigger item.

4.18 Inventory Tags Search By Tag Attributes

Inventory Tag Numbers enable you to identify products with different characteristics. Inventory identification numbers are used to identify products with different characteristics. Some common examples of

identification numbers are lot number, revision number, and manufacturing batch number.

Also, these identification numbers are not necessarily relevant to every product offered by the company. For some products, a lot number uniquely defines all characteristics of a product whereas revision number differentiates another product.

Typically, an inventory tag number represents any type of the real life manufacturing or customization numbers (for example, lot number, batch number, or revision number) based on the product. In addition, Inventory Tag Number is typically used only by the system and the physical product will carry the actual Inventory identification numbers.

Note: If a node does not use Yantra 7x and cannot track tag information, it cannot inform Yantra 7x about the details of a lot that has shipped. For such nodes, tag tracking is not supported.

Note: Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 4–27 Inventory Tags Search By All Attributes

Fields	
Organization	If you are a Hub organization, enter the organization that owns the inventory item list with which you want to work.
Item ID	Enter the item ID of the item contained in the group you are searching for, if applicable.
Product Class	Enter the product class of the items contained in the group you are searching for, if applicable.
Unit of Measure	Enter the unit of measure of the items contained in the group you are searching for, if applicable.
Batch Number	Enter the group number you are searching for, if applicable.

Table 4–27 Inventory Tags Search By All Attributes

Fields	
Revision Number	Enter the versioning identifier that applies to this group.
Lot Number	A lot is a grouping of associated units of an item. These units share an attribute, such as a manufacturing date and typically have an identical lifecycle. This enables you to track defective items and recall them later.
Manufacture Date	Enter the date the group of items were manufactured.
Lot Key Reference	Enter the key value used to reference the lot.
Lot Attribute #1	Enter information as needed.
Lot Attribute #2	Enter information as needed.
Lot Attribute #3	Enter information as needed.
Max Records	Enter the maximum number of audits you want listed as a result of your search.

The [Inventory Tag List](#) is displayed as the result of the search.

4.19 Inventory Tag List

The Inventory Tag List window displays the results of an inventory tag search. You can perform actions on a single or multiple inventory groups by selecting the check boxes of the inventory tags you want to perform an action on and choosing the applicable action from the action bar. Refer to the [Inventory Tag List](#) table for assistance.

Table 4–28 Inventory Tag List

Action	
View Details	This action takes you to the Inventory Details screen for the selected inventory tag items.
Fields	
Item ID	The item ID.
PC	The item's product class.
UOM	The item's unit of measurement.

Table 4–28 Inventory Tag List

Tag #	The tag number the item belongs to. The item's tag information displays, if the node having inventory is configured to capture the tag attributes in all operations performed within the node. For more information about capturing the tag attributes, refer to the <i>Yantra 7x Platform Configuration Guide</i> .
Quantity	The quantity of the item in the tag.
Manufacture Date	The date the tag was manufactured.

4.20 Inventory Details

This screen displays the details of the inventory tag items based on the item, tag and inventory information.

Table 4–29 Inventory Details Screen, Item Information

Fields	
Item ID	The item ID. Click this link to view the inventory summary for the Item ID.
PC	The item's product class.
UOM	The item's unit of measure.


Table 4–30 Inventory Details Screen, Tag Information

Fields	
The item's tag information displays, if the node having inventory is configured to capture the tag attributes in all operations performed within the node. For more information about capturing the tag attributes, refer to the <i>Yantra 7x Platform Configuration Guide</i> .	
Tag Identifiers	Displays the unique tag identifiers you have specified for the item (for example, Lot #).
Tag Attributes	Displays any descriptive identifiers you have specified (for example, Manufacture Date).

Table 4–31 Inventory Details Screen, Inventory Information

Fields	
Onhand Supply	Displays the onhand supply for the item.
Other Supply	Displays the number of items available through any other supply.
Demand	Displays the demand raised for that item.

4.21 Ship Nodes

You can view the items available inventory broken down by node in this screen. This screen can be reached from the [Inventory Summary](#) screen by clicking the  view icon.

Note: If your organization does not maintain distribution, only the nodes owned by the organization entered in the item search are displayed. If your organization does maintain distribution, all nodes in your distribution are displayed.

Table 4–32 Ship Nodes Screen, Item Information

Fields	
Organization Code	The organization associated with the ship node.
Item ID	The item ID.
Product Class	The item's classification, such as first quality, second quality, or finished good. Orders for items are placed against this classification.
Unit of Measure	The item's unit of measure.
Tracked Everywhere	Displays Y if inventory is tracked at all nodes. Displays N if some ship nodes are configured on the system as INFINITE inventory nodes and therefore actual inventory information is not available.
Description	Description of the item.

Table 4–32 Ship Nodes Screen, Item Information

Fields	
Consider All Nodes	Select Consider All Nodes to see the item's availability picture across all nodes in your inventory consolidation. For more information about inventory consolidation, see the <i>Yantra 7x Inventory Synchronization Configuration Guide</i> .
Distribution Rule	<p>Select Distribution Rule to see the availability picture across that distribution. A distribution rule establishes the ship node determination process. It determines the default nodes that an item should be sourced from based on priority.</p> <p>For example, if you source the same item from multiple ship nodes, but have to set one of the ship nodes as the primary distributor of the item, you may create a distribution rule in the Configurator assigning that particular source node with the highest priority for shipping the item. For more information about distribution rules, see the <i>Yantra 7x Inventory Synchronization Configuration Guide</i>.</p>
Segmentation	<p>Select All Inventory - Displays quantity of segmented (set aside in order to fulfill demand from designated customers) and unsegmented items.</p> <p>Select Unsegmented Inventory - Enables display of items that have not been designated as segmented.</p> <p>Select Consider Segment Type - Choose the type of segmentation from the drop-down list:</p> <p>MTC - Made to Customer</p> <p>MTO - Made to Order</p> <p>Enter the Segment name. Segment is defined at the time of order creation or inventory adjustment.</p>
Horizon End Date	Enter the date up to which you want supply, demand, and availability to be calculated.


Table 4–33 Ship Nodes Screen, Nodes

Actions	
View Node Detail	This action takes you to the Ship Node Detail screen for viewing the inventory details on the selected ship node.

Table 4–33 Ship Nodes Screen, Nodes

Fields					
Ship Node	The node responsible for shipping the item. Click this link to view the ship node details.				
Supply	<div>Total inventory expected at the node through the date entered in Horizon End Date. Supply is calculated through the date entered in Horizon End Date.</div> <table><tr><td>Supply Type</td><td>The type of inventory supply of the item. For example, ONHAND, HOLD are valid supply types.</td></tr><tr><td>Quantity</td><td>The quantity of the supply type. Click this link to view the Supply Type Details.</td></tr></table>	Supply Type	The type of inventory supply of the item. For example, ONHAND, HOLD are valid supply types.	Quantity	The quantity of the supply type. Click this link to view the Supply Type Details .
Supply Type	The type of inventory supply of the item. For example, ONHAND, HOLD are valid supply types.				
Quantity	The quantity of the supply type. Click this link to view the Supply Type Details .				
Demand	<div>The amount of inventory at the node that becomes outgoing due to reservations and orders. Total Demand is calculated through the date entered in Horizon End Date.</div> <table><tr><td>Demand Type</td><td>The type of inventory demand of the item. For example, ALLOCATED, OPEN ORDER are valid supply types.</td></tr><tr><td>Quantity</td><td>The quantity of the demand type. Click this link to view the Demand List.</td></tr></table>	Demand Type	The type of inventory demand of the item. For example, ALLOCATED, OPEN ORDER are valid supply types.	Quantity	The quantity of the demand type. Click this link to view the Demand List .
Demand Type	The type of inventory demand of the item. For example, ALLOCATED, OPEN ORDER are valid supply types.				
Quantity	The quantity of the demand type. Click this link to view the Demand List .				

Table 4–33 Ship Nodes Screen, Nodes

Tracked	Displays Y if this ship node tracks inventory using Yantra 7x.
Supply / Demand	<p>Displays the relative proportion of items in supply and demand.</p> 

4.22 Ship Node Detail

The ship node detail screen provides the inventory summary for the inventory item belonging to that ship node. The functionality is same as that of the Inventory Summary Screen but with additional actions in the item information header panel.

Table 4–34 Ship Node Detail Screen, Item Information

Actions	
Adjust Inventory	This action button takes you to the Adjust Inventory Detail screen so that you can make adjustments to the inventory for the item.
Create Inbound Order	This action takes you to the Create Inbound Order screen for creating an inbound order for the inventory item.
Enable Sourcing	This action takes you to the Enable Sourcing screen to enable sourcing at the ship node provided the inventory picture at the node is synchronized with the system.
View Costing Details	This action takes you to the Costing Detail screen to view the inventory costing information for the specified ship node.
Fields	
Organization Code	The organization associated with the inventory.
Item ID	The item ID.
Product Class	The item's classification, such as first quality, second quality, or finished good.

Table 4–34 Ship Node Detail Screen, Item Information

Unit of Measure	The item's unit of measure.
Tracked Everywhere	Displays Y if inventory is tracked at all nodes. Displays N if some ship nodes are configured on the system as INFINITE inventory nodes and therefore actual inventory information is not available.
Description	Description of the item.
Lead Days	The amount of time (in days) needed to procure the item and make it available for shipping.
Processing Days	The amount of time (in days) it takes for an item to be received by a Seller and made ready for shipment.
Expired Supply	If the item is time sensitive, this field displays the total amount of inventory across the inventory consolidator that is expired based upon its ship by date.
Segmentation	<p>All Inventory - Displays quantity of segmented (set aside in order to fulfill demand from designated customers) and unsegmented items.</p> <p>Unsegmented Inventory - Enables display of items that have not been designated as segmented.</p> <p>Consider Segment Type - Choose the type of segmentation (MTC or MTO).</p> <p>Segment - Enter the Segment name. Segment is defined at the time of order creation or inventory adjustment.</p>
Horizon End Date	Enter the date up to which you want supply, demand, and availability to be calculated.

See the following tables for descriptions of the fields in the supply, demand and available panels:

- [Inventory Summary Screen, Supply](#)
- [Inventory Summary Screen, Demand](#)
- [Inventory Summary Screen, Available](#)

4.23 Create Inbound Order

You can create a purchase order for the item you are viewing. The inbound order enables a user to manually enter inbound orders.

Table 4–35 Create Inbound Order Screen, Header Details

Fields	
Enterprise	Select the Enterprise associated with the order you are creating.
Buyer	Enter the Buyer associated with the order you are creating.
Seller	Enter the Seller associated with the order you are creating.
Order #	Enter the order number of the order you are creating.
Order Type	Select the order type of the order you are creating. For example, Sales Order or Purchase Order.
Order Date	Enter the date you want the order to be created.
Order Name	Enter the order name of the order you are creating.
Currency	Select the currency to be used with the order you are creating.

Table 4–36 Create Inbound Order Screen, Line Details

Fields	
Item ID	The item ID.
Product Class	The item's product class.
Unit of Measure	The item's unit of measure.
Quantity	Enter the quantity of the item.
Receiving Node	Enter the receiving node the item was located at.
Ship Node	Enter the ship node the item was located at.
Requested Ship Date	Enter the requested ship date for the item.

The `Create Order` action takes you to the inbound order details screen for further processing. For more information on inbound order details refer to *Yantra 7x Supply Collaboration User Guide*.

4.24 Enable Sourcing

Depending on how the system is configured, a node may occasionally be disabled for sourcing. This occurs when an item is released to a node and subsequently backordered by that node.

When a node is disabled for sourcing of a particular item, it is not considered when scheduling is run for that item for a pre-determined period of time. However, you can enable sourcing at a node before the time frame is up if it is determined that the inventory picture at the node is synchronized with the system.

To enable sourcing go to the [Ship Node Detail](#) screen and choose **Enable Sourcing** in the item information panel.

4.25 Costing Detail

The costing details of the inventory item in a ship node is viewed in this screen.

Table 4–37 Costing Detail

Fields	
Organization Code	The organization for which you are viewing inventory costing details.
Ship Node	The name of the ship node for this item.
Item ID	Item ID number.
Quantity	The amount of this item that is onhand at this ship node.
Unit of Measure	The item's unit of measure.
Product Class	The item's classification, such as first quality, second quality, or finished good. Orders for items are placed against this classification.
Average Cost	The average cost of the items at this ship node.
Unit Cost	The cost of one unit of this item.
Inventory Value	The total inventory value of the on-hand inventory located at this ship node.

4.26 Supply Type Details

You can view an item's availability at a node by the supply type. To view a supply type's breakdown click the link on the supply type in the [Inventory Summary Screen, Supply](#) panel.

Table 4–38 Supply Type Details Screen, Item Information

Fields	
Item ID	Item ID number.
Product Class	The item's classification, such as first quality, second quality, or finished good. Orders for items are placed against this classification.
Unit of Measure	The item's unit of measure.
Description	Description of the item. This field can be modified.
Supply Type	The supply classification. For example ONHAND supply.

Table 4–39 Supply Type Details Screen, Supply Information

Fields	
Node	The ship node the purchase order is expected at.
ETA	The purchase order's estimated time of arrival.
PO #	The purchase order number.
Segment Type	The segment type associated with the supply.
Segment	The segment identifier.

Table 4–39 Supply Type Details Screen, Supply Information

Fields	
Tag #	<p>This column displays only if the item is tag-controlled. The column label that displays is the name of the unique identifier you have defined (for example, Lot #). If you have defined more than one unique identifier, the label that displays is Tag #.</p> <p>The item's tag information displays, if the node having inventory is configured to capture the tag attributes in all operations performed within the node. For more information about capturing the tag attributes, refer to the <i>Yantra 7x Platform Configuration Guide</i>.</p> <p>To view the details associated with the supply type tag, click the hypertext link.</p>
Quantity	The quantity of the item requested in the purchase order.

4.27 Demand Search By All Attributes

The demand search window enables you to search for a list of orders with the same demand type.

Table 4–40 Demand Search

Fields	
Item ID	Enter the item's ID to search for, if applicable.
Unit of Measure	Enter item's unit of measure to search for, if applicable.
Product Class	Enter the item's product class to search for, if applicable.
Demand Type	The demand type.
Demand Ship Date	Enter the ship date range through which you want to search for order demands, if applicable.
Order #	Enter the order number against this demand type is associated, if applicable.

Table 4–40 Demand Search

Fields	
Document Type	Select the document type against which you want to search for this demand type.
Max Records	Enter the maximum amount of records you want to be returned from the search.

The [Demand List](#) is displayed on the right side of the search screen.

4.28 Demand List

The Demand List window displays the results of a demand search. You can view the details of items in demand by selecting the check boxes of the inventory items you want to view and choosing the applicable action from the action bar. Refer to the [Demand List](#) table for assistance.

Table 4–41 Demand List

Fields	
Order #	The order number. Click this link to view the order detail screen. For more information on the order detail screen, see <i>Yantra 7x Distributed Order Management User Guide</i> .
Document Type	The order's document type. For example, Sales Order or Purchase Order.
Line #	The line number creating demand for the inventory item. Click this link to view the order line detail screen. For more information on the order line detail screen, see <i>Yantra 7x Distributed Order Management User Guide</i> .
Buyer	The Buyer organization associated with the order.
Seller	The Seller organization associated with the order.
Quantity	The quantity of line item demand for the inventory item.

4.29 Supply Type Tag Information

The tag information of a supply type can be viewed from the [Supply Type Details](#) screen.

Table 4–42 Supply Type Tag Information

Fields	
Tag Identifiers	Displays the unique tag identifiers you have specified for the item (for example, Lot #).
Tag Attributes	Displays any descriptive identifiers you have specified (for example, Manufacture Date).

Adjust Inventory Console Screens

This chapter provides the screen and field descriptions for all the Adjust Inventory Console screens.

5.1 Adjust Inventory

The Adjust inventory screen can be used to select an item to adjust its inventory.

Note: Do not use spaces before or after any text you enter in the fields, as this may result in inconsistent or inaccurate results.

Table 5–1 *Adjust Inventory Search*

Fields	
Organization	If you are a Hub organization, enter the organization that owns the inventory item list with which you want to work.
Item ID	Enter the item ID. This field is mandatory.
Product Class	Select the product class of the item, if applicable.
Unit of Measure	Select the unit of measure of the item, if applicable.

Enter the relevant information in the fields and click Proceed to adjust the inventory of the item.

5.2 Adjust Inventory Detail

The Adjust Inventory Detail screen enables you to adjust the inventory of a chosen item based on the supply type and available node. The following table provides field level descriptions of the adjust inventory detail screen.

Table 5–2 Adjust Inventory Detail Screen, Inventory Information

Fields	
Item ID	The item identifier.
Product Class	The item's classification, such as first quality, second quality, or finished good. Orders for items are placed against this classification.
Unit of Measure	The item's unit of measure.

Table 5–3 Adjust Inventory Detail Screen, Inventory Information

Fields	
Ship Node	The ship node at which you want to adjust the inventory. This field is mandatory.
Supply Type	Select the supply type that you are adjusting for from the drop-down list. This field is required.
Segment Type	Select the type of segment: <ul style="list-style-type: none"> • MTC - Made to Customer • MTO - Made to Order
Segment	Segment is defined at the time of order creation or inventory adjustment

Table 5–3 Adjust Inventory Detail Screen, Inventory Information

Fields							
Tag Identifiers	<p>Displays the unique tag identifiers you have specified for the item (for example, Lot #).</p> <table> <tr> <td>Lot #</td><td>Enter the Lot number associated with this tag identifier.</td></tr> <tr> <td>Batch #</td><td>Enter the Batch number associated with this tag identifier.</td></tr> <tr> <td>Revision #</td><td>Enter the Revision number associated with this tag identifier.</td></tr> </table>	Lot #	Enter the Lot number associated with this tag identifier.	Batch #	Enter the Batch number associated with this tag identifier.	Revision #	Enter the Revision number associated with this tag identifier.
Lot #	Enter the Lot number associated with this tag identifier.						
Batch #	Enter the Batch number associated with this tag identifier.						
Revision #	Enter the Revision number associated with this tag identifier.						
Tag Attributes	<p>Displays any descriptive identifiers you have specified (for example, Manufacture Date).</p> <table> <tr> <td>Lot Key Reference</td><td>Enter the Lot key reference associated with this tag attribute.</td></tr> <tr> <td>Manufacturing Date</td><td>Enter the manufacturing date for this tag attribute.</td></tr> <tr> <td>Lot Attribute 1</td><td>Enter the lot attribute 1 with this tag attribute.</td></tr> </table>	Lot Key Reference	Enter the Lot key reference associated with this tag attribute.	Manufacturing Date	Enter the manufacturing date for this tag attribute.	Lot Attribute 1	Enter the lot attribute 1 with this tag attribute.
Lot Key Reference	Enter the Lot key reference associated with this tag attribute.						
Manufacturing Date	Enter the manufacturing date for this tag attribute.						
Lot Attribute 1	Enter the lot attribute 1 with this tag attribute.						
<p>The item's tag information displays, if the node having inventory is configured to capture the tag attributes in all operations performed within the node. For more information about capturing the tag attributes, refer to the <i>Yantra 7x Platform Configuration Guide</i>.</p>							

Table 5–4 Adjust Inventory Detail Screen, Adjustments

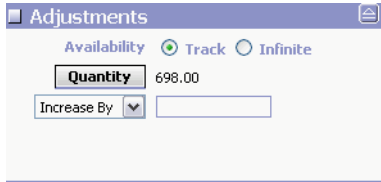
Fields	
Availability	Choose Track for inventory whose supply you must monitor. Choose Infinite for inventory that is not important to track, such as inexpensive and easy-to-acquire items, for example, paper clips.
Quantity	<p>Choose the Quantity button to display the quantity in inventory that corresponds with the supply type you have selected.</p> 
Increase/Decrease	<p>To add to your inventory, select Increase By. To subtract from your inventory, select Decrease By.</p> <p>Enter the amount by which you want to increase or decrease your inventory.</p>

Table 5–5 Adjust Inventory Detail Screen, References

Fields	
Reference #1	This field is customizable as needed.
Reference #2	This field is customizable as needed.
Reference #3	This field is customizable as needed.
Reference #4	This field is customizable as needed.
Reference #5	This field is customizable as needed.

Table 5–6 Adjust Inventory Detail Screen, Modification Reason

Fields	
Reason Code	Choose a modification reason code from the drop-down list.
Reason Text	Enter an explanation of why you are performing the modification.

6

Capacity Console Screens

The Capacity Console provides an interface that enables you to work with resource pools:

- View and modify a resource pool's standard capacity
- View and modify a resource pool's capacity overrides
- View a resource pool's attributes, regions served, and serviced items
- View a resource pool's availability

6.1 Capacity Search

A resource pool has a specific set of provided services or delivery services that are available within a specific geographic area and within specific time frames.

Note: Items are listed only for the organization's inventory consolidator. If you are logged in as a Hub, the list only displays the items the Hub owns. When logged in as a Hub, you can query on other organization's inventory items by using the Enterprise Code search criteria.

Note: Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 6–1 Capacity Search

Fields	
Capacity Organization	Enter the capacity organization for which you want to search. The capacity organization is the organization that plans the capacity. This field is mandatory.
Provider Organization	Enter the provider organization for which you want to search. The provider organization is the organization that provides the resources to fulfill capacity. This field is mandatory.
Node	Enter a node or use the lookup to search for the service node you want to use. This field is mandatory.
Delivery Service	Choose this to search for a delivery service item, such as piano moving, if applicable.
Provided Service	Choose this to search for a service item, such as installation and configuration, if applicable.
Start Date	Enter the start date of the service.
Number Of Days To Display	Enter the number of days to display, if applicable, when specifying a start date.
Country	Enter the country where the node is located.
Postal Code	Enter the postal code that corresponds with the location of the node.
Resource Pool	Enter the resource pool whose capacity you want to view.
Availability	Enter the units to limit the capacity search to.

Table 6–1 Capacity Search

Fields	
Capacity Unit of Measure	Select the unit of measure of the item you are searching for, if applicable.
Show Availability Expanded	Select this if you want to automatically display the amounts of consumption and availability within capacity.
Show Availability With Supplemental Capacity	Select this if you want Yantra 7x to consider supplemental capacity when calculating available capacity.
Max Records	Enter the maximum number of items you want listed as a result of your search.

The search results are displayed in the [Capacity Details](#) screen.

6.2 Capacity Details

The capacity details lists the capacities of individual resource pool along with the possible actions.

Table 6–2 Capacity Details

Actions	
View Details	This action takes you to the Resource Pool Details screen where you can view the resource regions, provider organization information and available resources.
View Capacity By Resource	This action takes you to the Resource Availability Details screen where you can view the capacity by the service resource.
Standard Capacity	This action takes you to the Resource Pool Standard Capacity Details screen where you can add or modify the standard capacities for the resource pool.
Fields	
Resource Pool	The resource pool for which capacity is displayed. Click this link to view the Resource Pool Details .

Table 6–2 Capacity Details

Slot	A defined period of time against which service item promising can be made. You can define multiple slots and slot groups, allowing you to schedule appointments of different granularity for different resource pools. For example, you can associate a slot group made of service slots that promise four hour windows with a delivery service resource pool and a slot group made of service slots that promise two hour windows with a provided service resource pool.					
Measure	<p>Resource capacity components determine delivery service item and provided service item availability. Capacity is the sum of consumption and availability.</p> <p>Capacity consumption is maintained against a Resource Pool as part of the order scheduling process. The Capacity Consumption maintains a link to the actual Order Line for which the capacity is being consumed.</p> <table><tr><td>Supplemental Capacity</td><td>The amount of supplemental capacity that has been defined for that slot. This does not represent the quantity of available supplemental capacity, but just how much of it has been defined.</td></tr><tr><td>Consumption</td><td>The amount of the capacity consumed.</td></tr></table>		Supplemental Capacity	The amount of supplemental capacity that has been defined for that slot. This does not represent the quantity of available supplemental capacity, but just how much of it has been defined.	Consumption	The amount of the capacity consumed.
Supplemental Capacity	The amount of supplemental capacity that has been defined for that slot. This does not represent the quantity of available supplemental capacity, but just how much of it has been defined.					
Consumption	The amount of the capacity consumed.					
Calendar	The calendar displays the amount of time of each time slot.					

6.3 Resource Pool Details

A resource pool definition consists of:

- Regions and time slots served
- Delivery Items or Service Items that are provided by the Resource Pool.
- Service skills that are executed by the resource pool for the provided delivery or service item

- Standard Resource Capacity Definition
- Specific Resource Capacity Overrides

Delivery and provided services are supplied by defined service nodes. Service nodes can provide multiple delivery and provided services. Resource pools provide the ability to define how much service capacity is available for these services by geographical area and time slots. A resource pool is an aggregate collection of service resources needed to perform a delivery service or provided service. A resource pool is defined by the organization that is providing the capacity.

Table 6–3 Resource Pool

Fields	
Resource Pool	The name of the resource pool. This cannot be changed after creation.
Resource Pool Description	The description of the resource pool.
Node	The name of the node associated with the resource pool.
Capacity Organization	The organization associated with the resource pool.
Supervisor ID	The identifier of the supervisor for this resource pool.

Table 6–4 Resource Pool Details Screen, Region

Fields	
Region	<p>This is the geographical area that has been specified in the Yantra 7x Configurator as a service area.</p> <p>If the resource pool has been defined to cover all possible geographic areas, this table displays All Regions Serviced.</p> <p>If the resource pool has been broken into areas, the table displays the details about the serviced as regions described below. To view postal code information, choose the associated link and it takes you to the Region Details screen.</p>
Slot (Start Time - End Time)	If this resource pool has been configured to service regions by specific time slots, this column will appear, displaying which time slots service which time of day.

Table 6–4 Resource Pool Details Screen, Region

Fields	
Primary	Relative level of importance assigned to a service item. For example, if a region has two available resource pools (RP1 is designated Primary and RP2 is not), and all other criteria is equivalent, an order shipped to this region will use the resource pool designated as Primary (RP1).
Days	Specifies the days of the week a service is available.

The services that the resource pool can provide is defined by associating Service Skill IDs with the Resource Pool. A Resource Pool can either have Delivery Service Items **or** Provided Service Skills associated with it (not both).

Table 6–5 Resource Pool Details Screen, Service Skills

Fields	
Service Skill ID	ID of the service skill, such as plumbing, electrical, and so forth.
Description	Description of the service skill.

For provided services, this is the node's owner organization. After creation, the provider organization cannot be changed.

Table 6–6 Resource Pool Details Screen, Provider Organization

Fields	
Provider Organization Code	Code associated with the provider organization.
Provider Contact Address	Address of the provider organization.

The service resources maintained within this resource pool.

Table 6–7 Resource Pool Details Screen, Resources

Fields	
Service Resource ID	Identifier of the service resource.
Contact Address	The contact address for the service resource.
Notes	Notes on the service resource.

6.4 Region Details

If a resource pool has one or more defined regions, you can view information that specifies the postal code range served.

Table 6–8 Region Details Screen, Region Details

Fields	
Region	The name used to identify the specific region associated with the resource pool.
Region Level	The relative size of the region associated with the resource pool (for example, State or County).
Parent Region	The larger geographic area that contains the specific region associated with the resource pool.
Country	The country that contains the specific region associated with the resource pool.

Table 6–9 Region Details Screen, Postal Code Ranges

Fields	
From Postal Code	The beginning range of the postal code.
To Postal Code	The ending range of the postal code.
Country	The country code associated with these postal codes.

6.5 Resource Pool Current Standard Capacity Details

The current standard capacity details of a resource includes the date range and time frame in which a particular delivery service or provided service is available.

Table 6–10 Resource Pool

Fields	
Resource Pool	The name of the resource pool. This cannot be changed after creation.
Resource Pool Description	The description of the resource pool.
Node	The name of the node associated with the resource pool.
Capacity Organization	The organization associated with the resource pool.
Supervisor ID	The identifier of the supervisor for this resource pool.

The default definition of capacity for each shift/day of week combination. This is applicable for the Resource Pool for all days. Standard capacities are defined within period of efficacy (standard capacity periods). Standard capacity periods cannot overlap.

Table 6–11 Resource Pool Current Standard Capacity Details Screen, Current Standard Capacities

Fields	
Effective Start Date	The effective start date of the standard capacities.
Effective End Date	The effective end date of the standard capacities.
Standard Capacity	
Slot	The name of the standard capacity slot.
Start Time	The time the standard capacity slot range begins.
End Time	The time the standard capacity slot range ends.
Day of Week	The amount of time each standard capacity slot has for each day of the week.
Supplemental Capacity	
Slot	The name of the standard capacity slot.
Start Time	The time the standard capacity slot range begins.

Table 6–11 Resource Pool Current Standard Capacity Details Screen, Current Standard Capacities

End Time	The time the standard capacity slot range ends.
Day of Week	The amount of time each standard capacity slot has for each day of the week.

Table 6–12 Resource Pool Current Standard Capacity Details Screen, Standard Capacity Periods

Actions	
View Standard Capacity	This action takes you to the Resource Pool Standard Capacity Details screen to view the standard capacity details.
Create New	This action takes you to the Resource Pool Standard Capacity Period screen where you can create a new standard capacity for the given resource pool.
Delete	This action deletes the selected standard capacity records.
Fields	
Start Date	The start date of the standard capacity periods.
End Date	The end date of the standard capacity periods.

6.6 Resource Pool Standard Capacity Period

You can create a standard capacity for a given resource pool in this screen.

Table 6–13 Resource Pool

Fields	
Resource Pool	The name of the resource pool. This cannot be changed after creation.
Resource Pool Description	The description of the resource pool.
Node	The name of the node associated with the resource pool.
Capacity Organization	The organization associated with the resource pool.

Table 6–13 Resource Pool

Fields	
Supervisor ID	The identifier of the supervisor for this resource pool.

Table 6–14 Resource Pool Current Standard Capacity Details Screen, Standard Capacity Period

Fields	
Effective Start Date	The effective start date of the standard capacity.
Effective End Date	The effective end date of the standard capacity.

6.7 Resource Pool Standard Capacity Details

The current standard capacity details of a resource includes the date range and time frame in which a particular delivery service or provided service is available.

Table 6–15 Resource Pool

Fields	
Resource Pool	The name of the resource pool. This cannot be changed after creation.
Resource Pool Description	The description of the resource pool.
Node	The name of the node associated with the resource pool.
Capacity Organization	The organization associated with the resource pool.
Supervisor ID	The identifier of the supervisor for this resource pool.

The default definition of capacity for each shift/day of week combination. This is applicable for the Resource Pool for all days. Standard capacities are defined within period of efficacy (standard capacity periods). Standard capacity periods cannot overlap.

Table 6–16 Resource Pool Current Standard Capacity Details Screen, Standard Capacities

Fields	
Effective Start Date	The effective start date of the standard capacities.
Effective End Date	The effective end date of the standard capacities.
Standard Capacity	
Slot	The name of the standard capacity slot.
Start Time	The time the standard capacity slot range begins.
End Time	The time the standard capacity slot range ends.
Day of Week	The amount of time each standard capacity slot has for each day of the week.
Supplemental Capacity	
Slot	The name of the standard capacity slot.
Start Time	The time the standard capacity slot range begins.
End Time	The time the standard capacity slot range ends.
Day of Week	The amount of time each standard capacity slot has for each day of the week.

6.8 Resource Availability

You can view the resource availability by service resources with the help of this screen.

Table 6–17 Resource Pool

Fields	
Resource Pool	The name of the resource pool. This cannot be changed after creation.
Resource Pool Description	The description of the resource pool.
Node	The name of the node associated with the resource pool.
Capacity Organization	The organization associated with the resource pool.
Supervisor ID	The identifier of the supervisor for this resource pool.

Table 6–18 Resource Availability Screen, Resource Availability Panel

Fields	
Start Date	Specify the start date for the calendar you are viewing.
Number of Days to Display	Enter number of days you want to view in calendar and click Go.
Resource ID	The name of the service resource.
Calendar	The calendar displays the amount of time of each time slot. Click on this hyper link to view the Resource Availability Details screen.

6.9 Resource Availability Details

You can view the resource availability details for the resources of a particular capacity organization in this screen.

Table 6–19 Resource Availability Details Screen, Resource Availability Details

Fields	
Resource ID	The name of service resource.
Date	The date of the resource availability currently displayed.

Table 6–20 Resource Availability Details Screen, Slot Based Appointment

Fields	
Slot	The slot the appointment has been scheduled in.
Start Time	The time the appointment starts.
End Time	The time the appointment ends.
Order #	The order number of order with which the appointment is associated.
Word Order #	The work order number of the work order with which the appointment is associated.
Capacity Overridden	Indicates whether or not capacity has been overridden for the appointment.

Table 6–21 Resource Availability Details Screen, Other Resource Reservations and Appointment

Actions	
Add	This action takes you to the Add Resource Reservation screen where you can add service resource reservations.
Delete	This action deletes the selected resource reservations.
Fields	
Start Time	The time the appointment starts.
End Time	The time the appointment ends.
Order #	The order number of the order with which the appointment is associated.
Word Order #	The work order number of the work order with which the appointment is associated.
Reserved Manually	Indicates whether or not the appointment has been reserved manually.
Reason	Indicates why reservation has been made for this appointment.

6.10 Add Resource Reservation

You can create reservations for a service resource.

Table 6–22 Add Resource Reservation

Fields	
Start Time	Enter a start time for the reservation.
End Time	Enter an end time for the reservation.
Reason	Enter a reason for why this reservation is being made.

Create Work Order Screens

Work orders are generated in a warehouse to support VAS activities. These work orders may be generated automatically from an order, based on min/max levels configured for an item (using events) or created manually.

The Create Work Order console allows you to create work orders for the selected service.

7.1 Create Work Order

You can create a work order for VAS related activities with the help of this screen.

Table 7–1 Create Work Order Screen, Primary Information

Fields	
Node	Select the node associated with the work order you are creating. The node is automatically populated based on the user.
Enterprise	Select the enterprise associated with the work order you are creating.
Work Order #	Enter the work order number for the work order you are creating. The system will automatically generate a unique number if a value is not entered.

Table 7–1 Create Work Order Screen, Primary Information

Fields	
Service Item Group	<p>Select the appropriate service item group for the work order you are creating.</p> <p>Valid values are KITTING, DEKITTING, INVENTORY CHANGES, INVENTORY COMPLIANCE.</p> <p>Note: You can create work orders for the "KITTING" service item group without specifying the components.</p>
Purpose	<p>Select the purpose associated with the work order you are creating.</p> <p>Valid values are Order, Stock, Ship.</p>
Priority	<p>Select the priority for the work order you are creating, if applicable. Appropriate priority is assigned to all tasks for the work order.</p> <p>Valid values are Urgent, High, Normal, Low.</p>
Start No Earlier Than	Enter the start date and time for the work order, if applicable.
Finish No Later Than	Enter the end date and time for the work order, if applicable
Service Item ID	<p>Enter the service item ID associated with the item you want to create.</p> <p>If not entered the service associated with the parent item in the catalog based on service item group chosen is populated.</p>
Ignore Run Quantity	Select this check box to ignore the run quantity.
Release Immediately	Select this check box if work order is released immediately on completion of allocation process.

Table 7–2 Create Work Order Screen, Work Order Item Data

Fields	
Item ID	Enter the item created as a result of the work order. Also referred to as 'Kit Item' or 'Parent Item'. This is mandatory for service item groups of KITTING, DE-KITTING, INVENTORY CHANGE, INVENTORY COMPLIANCE.
Unit Of Measure	Select the unit of measure of the item associated with the work order you are creating.
Product Class	Select the product class of the item associated with the work order you are creating
Segment Type	Select the segment type of the item associated with the work order you are creating, if applicable. Typical values include 'MTO' - Made to Order or 'MTC' - Made To Customer.
Segment	Enter the specific order number or customer number associated with the work order you are creating. This is applicable only if Segment Type is chosen.
Requested Quantity	Enter the quantity of the item being created on the work order.

After entering the relevant information in the above fields, the work order is created upon clicking the **Proceed** button. The [Create Work Order Details](#) screen displays.

7.2 Create Work Order Details

This screen lets you enter some more information related to the work order creation process such as Component Items, Activities and Additional Item Data.

Table 7–3 Create Work Order Details Screen, Primary Information

Fields	
Node	The node associated with the work order displays.
Enterprise	The enterprise associated with the work order displays.
Work Order #	The work order number for the work order displays.

Table 7–3 Create Work Order Details Screen, Primary Information

Fields	
Service Item Group	The service item group associated with the work order is automatically populated.
Purpose	The purpose associated with the work order displays.
Priority	Select the priority for the work order you are creating, if applicable. Appropriate priority is assigned to all tasks for the work order. Valid values are Urgent, High, Normal, Low.
Start No Earlier Than	Enter the start date and time for the work order, if applicable.
Finish No Later Than	Enter the end date and time for the work order, if applicable.
Service Item ID	The service item ID associated with the item displays.
Ignore Run Quantity	Select to ignore the run quantity.
Release Immediately	Select if work order is released immediately on completion of allocation process.

Table 7–4 Create Work Order Details Screen, Work Order Item Data

Actions	
Additional Item Details	This action takes you to the Additional Item Details screen to enter tag details for the item. You can enter the tag details only when the node fulfilling the work order is configured to capture the tag attributes in all operations performed within the node. For more information about capturing tag attributes, refer to the <i>Yantra 7x Platform Configuration Guide</i> .
Fields	
Item ID	Enter the item created as a result of the work order. Also referred to as 'Kit Item' or 'Parent Item'. This is mandatory for service item groups of KITTING, DE-KITTING, INVENTORY CHANGE, INVENTORY COMPLIANCE.
Unit Of Measure	Select the unit of measure of the item associated with the work order you are creating.

Table 7–4 Create Work Order Details Screen, Work Order Item Data

Product Class	Select the product class of the item associated with the work order you are creating
Segment Type	Select the segment type of the item associated with the work order you are creating, if applicable. Typical values include 'MTO' - Made to Order or 'MTC' - Made To Customer.
Segment	Enter the specific order number or customer number associated with the work order you are creating. This is applicable only if Segment Type is chosen.
Requested Quantity	Enter the quantity of the item being created on the work order.

The container details appear only for the Dekitting service item group.

Table 7–5 Create Work Order Details Screen, Container Details

Fields	
Pallet ID	Enter the pallet LPN associated with the container.
Case ID	Enter the case LPN associated with the container.
Serial #	Enter the serial number.

Table 7–6 Create Work Order Details Screen, Component Items



Actions	
Delete	This action allows you to delete the selected tag details.
Fields	
Tag Details	<p>Click on  to view the tag details.</p> <p>You can view the tag details only when the node fulfilling the work order is configured to capture the tag attributes in all operations performed within the node. For more information about capturing tag attributes, refer to the <i>Yantra 7x Platform Configuration Guide</i>.</p>

Table 7–6 Create Work Order Details Screen, Component Items





Item ID	Enter the component associated with parent item you want to create. Click on  to add component item details.
PC	Select the product class associated with component item.
UOM	Select the unit of measure of the item associated with the work order you are creating.
Qty Per Kit	Enter the component item quantity required for the parent item
Segment Type	Select segment type for the component inventory, if applicable.
Segment	Enter order number or customer name for the component inventory, if applicable.

Activities are populated from the service item associated with the work order or the item. All activities to be associated with the item being created are specified for the component quantity.

Table 7–7 Create Work Order Details Screen, Activities

Actions	
Delete	This action allows you to delete the selected tag details.
Fields	
Instructions	Enter any additional instructions for the activity.

Table 7–7 Create Work Order Details Screen, Activities

Location Details	<div>The location where the activity is performed displays.</div> <div>Click on the  icon, to view and hide location details.</div> <table><tr><td>Preferred Location</td><td>Click on the  icon to add new location.</td></tr><tr><td>Requested Quantity</td><td>Enter the quantity you want to move into the location.</td></tr></table>	Preferred Location	Click on the  icon to add new location.	Requested Quantity	Enter the quantity you want to move into the location.
Preferred Location	Click on the  icon to add new location.				
Requested Quantity	Enter the quantity you want to move into the location.				
Inv Upd Activity	Inventory updated for the activity.				
Seq #	Enter a sequence for the activity being performed.				
Activity Code	<div>Select the activity code to associate with the location and quantity.</div> <div>Choose the field and lookup icon to find the specific activity code you want to use.</div>				

Once the changes are saved the work order is created and the Work Order Details screen displays.

The following note is essential if you want to view the inventory compliance for an item.

Note: The screen that appears when you select Inventory Compliance as the service group code, depends on the Service Involves Segment Change field configuration. For more information about configuring the Service Involves Segment Change field, refer to the *Yantra 7x Warehouse Management System Configuration Guide*.

7.3 Additional Item Details

You can enter additional tag details pertaining to the item selected for the work order in the [Create Work Order Details](#) screen.

Table 7–8 Additional Item Details Screen, Tag Details

Fields							
Tag Identifiers	<p>Enter the unique tag identifiers you have specified for the item. For example, Lot #.</p> <table border="1"> <tr> <td>Lot #</td> <td>Enter the Lot number associated with this tag identifier.</td> </tr> <tr> <td>Batch #</td> <td>Enter the Batch number associated with this tag identifier.</td> </tr> <tr> <td>Revision #</td> <td>Enter the Revision number associated with this tag identifier.</td> </tr> </table>	Lot #	Enter the Lot number associated with this tag identifier.	Batch #	Enter the Batch number associated with this tag identifier.	Revision #	Enter the Revision number associated with this tag identifier.
Lot #	Enter the Lot number associated with this tag identifier.						
Batch #	Enter the Batch number associated with this tag identifier.						
Revision #	Enter the Revision number associated with this tag identifier.						
Tag Attributes	<p>Enter any descriptive identifiers specified for the item. For example, Manufacture Date.</p> <table border="1"> <tr> <td>Lot Key Reference</td> <td>Enter the Lot key reference associated with this tag attribute.</td> </tr> <tr> <td>Manufacturing Date</td> <td>Enter the manufacturing date for this tag attribute.</td> </tr> <tr> <td>Lot Attribute 1</td> <td>Enter the lot attribute 1 with this tag attribute.</td> </tr> </table>	Lot Key Reference	Enter the Lot key reference associated with this tag attribute.	Manufacturing Date	Enter the manufacturing date for this tag attribute.	Lot Attribute 1	Enter the lot attribute 1 with this tag attribute.
Lot Key Reference	Enter the Lot key reference associated with this tag attribute.						
Manufacturing Date	Enter the manufacturing date for this tag attribute.						
Lot Attribute 1	Enter the lot attribute 1 with this tag attribute.						

Click **OK** to return to the [Create Work Order Details](#) screen.

Work Order Console Screens

Work Order Console provides:

- Extensive search capabilities using granular level information such as work order number, segment type, segment number.
- Comprehensive visibility at an enterprise and node level.

8.1 Work Order Search By Item

You can perform work order search by a service item or a product item ID.

Table 8–1 *Work Order Search By Item*

Fields	
Node	Select the node for which you want to search.
Enterprise	Select the enterprise for which you want to search.
Across Enterprise	Select this option if you are searching across all enterprises.
Allocated	Select the appropriate allocation level for the work order you are searching.
Released	Select the appropriate released level for the work order you are searching for.
Service Item Group	Select the appropriate service item group for the work order you are searching. Valid values are KITTING, DEKITTING, PROVIDED SERVICE, INVENTORY CHANGE, INVENTORY COMPLIANCE.

Table 8–1 Work Order Search By Item

Fields	
Service Item ID	Select the appropriate service item ID for the work order for which you want to search.
Work Order Status Range	Select the status range associated with the work order you are searching of, if applicable.
Held Work Orders With Hold Type	Select the check box and select the hold type from the list that you want to search for work orders with that hold type, if applicable.
Work Order #	Enter the work order number associated with the work order you are searching for, if applicable.
Segment Type	Select the segment type associated with the work order you are searching for, if applicable.
Segment #	Enter the segment number associated with the work order you are searching for, if applicable.
Priority	Select the priority associated with the work order you are searching for, if applicable.
Item ID	Enter the item ID associated with work order you want to search for, if applicable.
Max Records	Enter the maximum number of records you want listed as a result of your search.

The [Work Order List](#) screen displays the search results.

8.2 Work Order Search By Container

You can perform work order search by the pallet or case IDs or the serial number of the container.

Table 8–2 Work Order Search By Container

Fields	
Node	Select the node for which you want to search.
Enterprise	Select the enterprise for which you want to search.
Across Enterprise	Select this option if you are searching across all enterprises.

Table 8–2 Work Order Search By Container

Fields	
Allocated	Select the appropriate allocation level for the work order you are searching.
Released	Select the appropriate released level for the work order you are searching for.
Service Item Group	Select the appropriate service item group for the work order you are searching. Valid values are KITTING, DEKITTING, PROVIDED SERVICE, INVENTORY CHANGE, INVENTORY COMPLIANCE.
Status Range	Select the status range associated with the item you are searching of, if applicable.
Work Order #	Enter the work order number associated with the work order you are searching for, if applicable.
Segment Type	Select the segment type associated with the work order you are searching for, if applicable.
Segment #	Enter the segment number associated with the work order you are searching for, if applicable.
Priority	Select the priority associated with the work order you are searching for, if applicable.
Pallet ID	Enter the pallet LPN associated with the container, if applicable.
Case ID	Enter the case LPN associated with the container, if applicable.
Serial #	Enter the serial number associated with the container you are searching for, if applicable
Max Records	Enter the maximum number of records you want listed as a result of your search.

The [Work Order List](#) screen displays the search results.

8.3 Work Order Search By Date

You can perform work order search by the start and finish dates of the work order.

Table 8–3 Work Order Search By Date

Fields	
Node	Select the node for which you want to search.
Enterprise	Select the enterprise for which you want to search.
Across Enterprise	Select this option if you are searching across all enterprises.
Allocated	Select the appropriate allocation level for the work order you are searching.
Released	Select the appropriate released level for the work order you are searching for.
Service Item Group	Select the appropriate service item group for the work order you are searching. Valid values are KITTING, DEKITTING, PROVIDED SERVICE, INVENTORY CHANGE, INVENTORY COMPLIANCE.
Service Item ID	Select the appropriate service item ID for the work order for which you want to search.
Status Range	Select the status range associated with the work order you are searching for, if applicable.
Priority	Select the priority associated with the work order you are searching for, if applicable.
Start No Earlier Than	By default, the system displays Start No Earlier Than date and time. Enter the Start No Earlier Than date and time associated with the work order for which you want to search.
Finish No Later Than	By default, the system displays Finish No Later Than date and time. Enter the Finish No Later Than date and time associated with the work order for which you want to search.
Max Records	Enter the maximum number of records you want listed as a result of your search.

The [Work Order List](#) screen displays the search results.

8.4 Work Order Search By Activity

You can perform work order search by an activity code.

Table 8–4 Work Order Search By Activity

Fields	
Node	Select the node for which you want to search.
Enterprise	Select the enterprise for which you want to search.
Across Enterprise	Select this option if you are searching across all enterprises.
Allocated	Select the appropriate allocation level for the work order you are searching.
Released	Select the appropriate released level for the work order you are searching for.
Service Item Group	Select the appropriate service item group for the work order you are searching. Valid values are KITTING, DEKITTING, PROVIDED SERVICE, INVENTORY CHANGE, INVENTORY COMPLIANCE.
Item ID	Enter the service item ID associated with the work order you want to search for, if applicable.
Status Range	Select the status range associated with the work order you are searching for, if applicable.
Activity Code	Enter the activity code associated with the work order for which you want to search.
Activity location	Enter the activity location associated with the work order for which you want to search.
Is Complete	Select this option if you are searching for only completed work orders.
Max Records	Enter the maximum number of records you want listed as a result of your search.

The [Work Order List](#) screen displays the search results.

8.5 Work Order Search By Components

You can perform work order search by an component item ID.

Table 8–5 Work Order Search By Components

Fields	
Node	Select the node for which you want to search.
Enterprise	Select the enterprise for which you want to search.
Across Enterprise	Select this option if you are searching across all enterprises.
Allocated	Select the appropriate allocation level for the work order you are searching.
Released	Select the appropriate released level for the work order you are searching for.
Product Class	Select the product class of the item you are searching for, if applicable.
Status Range	Select the status range associated with the work order you are searching for, if applicable.
Component Item ID	Enter the component item ID associated with the work order you want to search for, if applicable.
Max Records	Enter the maximum number of records you want listed as a result of your search.

The [Work Order List](#) screen displays the search results.

8.6 Work Order List

The Work Order List window displays the results of an work order search. You can perform actions on a single work order line or multiple work order lines by selecting the check boxes of the work order lines you want to perform an action on and choosing the applicable action from the action bar.


Table 8–6 Work Order List

Actions	
View Details	This action takes you to the Work Order Details screen where you can view the details of the work order and perform various actions on the work order.

Table 8–6 Work Order List

View Tasks	<p>This action takes you to the task search screen. For more information on viewing the tasks refer to the <i>Yantra 7x Warehouse Management System User Guide</i>.</p> <p>Note: You can view tasks only for a single work order at a time.</p>
View Move Request	<p>This action takes you to the move request search screen. For more information on viewing the move requests refer to the <i>Yantra 7x Warehouse Management System User Guide</i>.</p> <p>Note: You can view tasks only for a single work order at a time.</p>
Confirm	This action lets you confirm the work order by taking you to the VAS station. For more information on viewing VAS stations, refer to the <i>Yantra 7x Warehouse Management System User Guide</i> .
Cancel	This action pops up a Cancellation Reason screen for cancelling the selected work orders.
Fields	
Work Order #	The work order number associated with the work order. Click this link to view the work order details.
Enterprise	The Enterprise associated with the work order.
Service Item Group	The service item group associated with the work order.
Item ID	The Item ID of the item associated with the work order.
UOM	The UOM code of the item associated with the work order.
Priority	The work order priority.
Segment Type	Segment type of the item. A segment type indicates an inventory category. Typical values are MTC - Made To Customer or MTO - Made to Order.
Segment #	Segment number of the item. A segment holds either the specific buyer or specific order number that requires dedication.

Table 8–6 Work Order List

Order #	The order number of the item.
Status	<p>The work order status.</p> <p>This  icon appears only if the work order is put on hold.</p>

8.7 Work Order Details

The work order detail screen enables you to perform certain actions such as confirm, cancel or allocate a work order. You can also view the status audits and outbound shipments from this screen.

Table 8–7 Work Order Details Screen, Primary Information




View Icons	
	This icon takes you to the shipments screen where you can view the outbound shipment details. For more information see the <i>Yantra 7x Warehouse Management System User Guide</i> .
	This icon takes you to the Work Order Status Audits screen which displays audit activity information pertaining to the specific work order.
	Activity Demand - This icon takes you to the Work Order Activity Demand screen where you can view the work order's activity demand.
Actions	
Confirm	This action lets you confirm the work order by taking you to the VAS station. For more information on viewing VAS stations, refer to the <i>Yantra 7x Warehouse Management System User Guide</i> .
Allocate	This action lets you allocate a work order.
Release	<p>This actions enables you to release the work order.</p> <p>Note: You cannot create retrieval move requests while releasing work orders for the "KITTING" service item group that does not have components.</p>
Cancel	This action pops up a Cancellation Reason screen for cancelling the selected work orders.

Table 8–7 Work Order Details Screen, Primary Information


View Holds	This action takes you to the Work Order Holds screen where you can view the various holds that are applied to the work order.
Fields	
Node	The node associated with the work order.
Enterprise	The enterprise associated with the work order.
Work Order #	The work order number associated with the work order.
Service Item Group	The service item group associated with the work order.
Status	<p>The work order status.</p> <p>Click on  to go to the Work Order Holds where you can view various holds that are applied to the work order.</p>
Priority	<p>Select the priority for the work order you are creating, if applicable. Appropriate priority is assigned to all tasks for the work order.</p> <p>Valid values are Urgent, High, Normal, Low.</p>
Start No Earlier Than	Work order date to start no earlier than.
Finish No Later Than	Work date to finish no later than.
Service Item ID	The service item ID associated with the item.
Purpose	The purpose associated with the work order.

Table 8–8 Work Order Details Screen, Work Order Item Data

Action	
Additional Item Details	<p>This action takes you to the Additional Item Details screen to enter tag details for the item.</p> <p>You can enter the tag details, if you have selected the option, When performing any node operation during the ship node tag capture configuration. For more information about capturing tag attributes, refer to the <i>Yantra 7x Platform Configuration Guide</i>.</p>
Fields	

Table 8–8 Work Order Details Screen, Work Order Item Data

Item ID	Enter the item created as a result of the work order. Also referred to as 'Kit Item' or 'Parent Item'. This is mandatory for service item groups of KITTING, DE-KITTING, INVENTORY CHANGE, INVENTORY COMPLIANCE.
Unit Of Measure	Select the unit of measure of the item associated with the work order you are creating.
Product Class	Select the product class of the item associated with the work order you are creating
Segment Type	Select the segment type of the item associated with the work order you are creating, if applicable. Typical values include 'MTO' - Made to Order or 'MTC' - Made To Customer.
Segment	Enter the specific order number or customer number associated with the work order you are creating. This is applicable only if Segment Type is chosen.
Requested Quantity	Enter the quantity of the item being created on the work order.

The quantities required for the work order is listed in this panel.

Table 8–9 Work Order Details Screen, Quantity



Fields	
Requested	Quantity requested by the work order.
Confirmed	Quantity confirmed by the work order.
Allocated	Quantity allocated to the work order.
Cancelled	Quantity cancelled from the work order.
Released	Quantity released by the work order.

The container details appear only for the Dekitting service item group.

Table 8–10 Work Order Details Screen, Container Details





Fields	
Pallet ID	Enter the pallet LPN associated with the container.
Case ID	Enter the case LPN associated with the container.
Serial #	Enter the serial number.

Table 8–11 Work Order Details Screen, Component Items

Action	
Delete	This action deletes the selected tag details.
Fields	
Tag Details	Click on  to view the tag details. You can view the tag details only if the inventory tag attributes are captured in all operations performed within the node. For more information about capturing the tag attributes, refer to the <i>Yantra 7x Platform Configuration Guide</i> .
Item ID	Enter the component associated with parent item you want to create. Click on  to add component item details.
PC	Select the product class associated with component item.
UOM	Select the unit of measure of the item associated with the work order you are creating.
Qty Per Kit	Enter the component item quantity required for the parent item.
Segment Type	Select segment type for the component inventory, if applicable.
Segment	Enter order number or customer name for the component inventory, if applicable.

Activities are populated from the service item associated with the work order or the item. All activities to be associated with the item being created are specified for the component quantity.

Table 8–12 Work Order Details Screen, Activities

Action					
Delete	This action deletes activities that you have selected.				
Fields					
Instructions	Enter any additional instructions for the activity.				
Location Details	<div>The location where the activity is performed displays. Click on the  icon, to view and hide location details. <table><tr><td>Preferred Location</td><td>Click on the  icon to add new location.</td></tr><tr><td>Requested Quantity</td><td>Enter the quantity you want to move into the location.</td></tr></table></div>	Preferred Location	Click on the  icon to add new location.	Requested Quantity	Enter the quantity you want to move into the location.
Preferred Location	Click on the  icon to add new location.				
Requested Quantity	Enter the quantity you want to move into the location.				
Inv Upd Activity	Inventory updated for the activity.				
Seq #	Enter a sequence for the activity being performed.				
Activity Code	<div>Select the activity code to associate with the location and quantity. Choose the field and lookup icon to find the specific activity code you want to use.</div>				

8.8 Work Order Status Audits

You can view any status modifications performed against a work order.

Table 8–13 Work Order Status Audits Screen, Primary Information

Fields	
Node	The node associated with the work order.
Enterprise	The enterprise associated with the work order.
Work Order #	The work order number associated with the work order.
Service Item Group	The service item group associated with the work order.

Table 8–13 Work Order Status Audits Screen, Primary Information

Fields	
Status	The work order status.
Start No Earlier Than	Work order date to start no earlier than.
Finish No Later Than	Work date to finish no later than.
Service Item ID	The service item ID associated with the item.

8.9 Work Order Activity Demand

This screen provides visibility to the work order's activity demand.

Table 8–14 Work Order Activity Demand, Primary Information


Fields	
Node	The node associated with the work order.
Enterprise	The enterprise associated with the work order.
Work Order #	The work order number associated with the work order.
Service Item Group	The service item group associated with the work order.
Status	<p>The work order status.</p> <p>Click on  to go to the Work Order Holds where you can view holds that are applied to the work order.</p>
Priority	<p>Select the priority for the work order you are creating, if applicable. Appropriate priority is assigned to all tasks for the work order.</p> <p>Valid values are Urgent, High, Normal, Low.</p>
Start No Earlier Than	Work order date to start no earlier than.
Finish No Later Than	Work date to finish no later than.
Service Item ID	The service item ID associated with the item.
Purpose	The purpose associated with the work order.

Table 8–15 Work Order Activity Demand, Activity Demand List

Action	
Delete	This action allows you to delete the selected activity demands.
Fields	
Location ID	The item location in the node.
Activity Code	The activity to be performed on items belonging to the work order.
Pallet Id	The pallet LPN that belong to the work order.
Case Id	The case LPN that belong to the work order.
Item ID	The items that belong to the work order.
Demand Quantity	Indicates whether the demand is satisfied or not.
Satisfied Quantity	The extent to which the demand is satisfied.
Demand Satisfied	Indicates whether the demand is satisfied or not.

8.10 Work Order Holds

You can view the various types of holds that are applied to the work order.

Table 8–16 Work Order Holds Screen, Primary Information

Fields	
Node	The node associated with the work order.
Enterprise	The enterprise associated with the work order.
Work Order #	The work order number associated with the work order.
Service Item Group	The service item group associated with the work order.
Status	The work order status.
Start No Earlier Than	Work order date to start no earlier than.
Finish No Later Than	Work date to finish no later than.
Service Item ID	The service item ID associated with the item.

Table 8–17 Work Order Holds Screen, Work Order Holds



Actions	
Add Holds	This action takes you to the Add Holds screen where you can add holds for the selected work order.
Fields	
	Click this icon to go to the View History screen where you can view the hold history for the selected hold.
Hold Description	A brief description of the hold.
Hold Status	The current status of the hold.
Hold Comment	Any additional comments for the hold.
Action	Select the action from the list that you want to apply for the hold.
Reason	Enter the reason for the hold.

Table 8–18 Work Order Holds Screen, Approved Holds

Fields	
	Click this icon to go to the View History screen where you can view the hold history for the selected hold.
Hold Description	A brief description of the hold.
Reason	The reason for the hold.

8.11 Add Holds

You can add holds for the work order with the help of this screen.

Table 8–19 Add Holds Screen, Work Order Holds

Fields	
Hold Type	Select the work order hold type from the list.
Reason	Enter the reason for the hold.

8.12 View History

In this screen you can view the hold history for the selected hold.

Table 8–20 View History Screen, Primary Information

Fields	
Node	The node associated with the work order.
Enterprise	The enterprise associated with the work order.
Work Order #	The work order number associated with the work order.
Service Item Group	The service item group associated with the work order.
Status	The work order status.
Start No Earlier Than	Work order date to start no earlier than.
Finish No Later Than	Work date to finish no later than.
Service Item ID	The service item ID associated with the item.

Table 8–21 View History Screen, Work Order Holds

Fields	
Hold Type	The hold type.
Date/Time	The date and time at which the hold was created.
User ID	The user who created the hold.
Status	The current status of the hold.
Comment	Any additional comments for the hold.
Hold Transaction	The hold transaction.

8.13 Cancellation Reason

You can cancel a work order from the [Work Order List](#) screen by selecting the appropriate work orders or from the [Work Order Details](#) screen for cancelling a particular work order.


Table 8–22 Cancellation Reason

Fields	
Cancellation Reason Code	Select the reason code associated with cancellation. This field is mandatory.
Reason Text	Enter any additional comments for the cancellation.

8.14 Work Order Details for Provided Service Items

You can view work order details for provided service items from the work order Work Order List screen. From the work order list, select the check boxes of PS service item group work orders and view the work order details.

Table 8–23 Work Order Details for Provided Service Items

Fields	
Node	The node associated with the work order.
Enterprise	The enterprise associated with the work order.
Work Order #	The work order number associated with the work order.
Quantity Requested	The quantity requested by the work order.
Status	The work order status.
Priority	Select the priority for the work order you are creating, if applicable. Appropriate priority is assigned to all tasks for the work order. Valid values are Urgent, High, Normal, Low.
Appointment	The appointment associated with the work order. Click on  to view the appointment details.
Service Item ID	The service item ID associated with the item.
Purpose	The purpose associated with the work order.
Ship To	Details of the location the item is being shipped to.

8.15 Appointment Details



You can plan an appointment for a work order of provided service item group. In Appointment, click on  icon. The Plan Appointment window appears.

Table 8–24 Appointment Details

Fields	
Currently Chosen Appointment Slot	Appointment Slot chosen for the work order.
Start Date	The start date of the work order. Click on  to view the calendar.
Delay Window	The days to be delayed for the work order.

Create Corporate Count Request Screens

The Create Corporate Count Request screen enables you to create count requests at the corporate level.

9.1 Create Corporate Count Request

Use the Create Corporate Count Request screen to create a count request at the corporate level. For more information about Count Console, see [Count Console Screens](#).

Table 9–1 Create Corporate Count Request Screen, Primary Information

Field	
Enterprise	Select the enterprise you are creating the count request for.
Request Name	Enter the count request name associated with the corporate count request you are creating.
Request Type	Select the request type associated with the count request.
Create Count Request For	<p>Select the 'All Nodes' radio option if you are creating a corporate count request for all the nodes participating with the Enterprise.</p> <p>Select the 'Specific Node' radio option and choose the applicable node from the lookup icon, if you are creating a corporate count request for a specific node.</p> <p>Select the 'All Nodes in Region' radio option and choose the applicable region from the lookup icon, if you are creating a corporate count request for all nodes in a specific region.</p>

Table 9–2 *Create Corporate Count Request Screen, Count Request Criteria*

Fields	
Product Class	Select the product class of the item associated with the count request you are creating, if applicable.
By Item	Choose this option if you are creating the count request for an item.
By Item Classification	Choose this option if you are creating the count request for an item classification.
Item ID	Enter the item ID of the item associated with count request you are creating, if applicable. This is applicable only when count request is created for items.
Unit Of Measure	Select the unit of measure of the item associated with the count request you are creating, if applicable. This is applicable only when count request is created for items.
Item Classification	<p>Enter the classification of the item associated with count request you are creating, if applicable. This is applicable only when count request is created for item classification.</p> <p>Note: A maximum of three item classifications may be displayed based on the Count Classifications configurations.</p>
Count Items whose unit value is between	Enter the minimum unit value of the items that are to be counted.
And	Enter the maximum unit value of the items that are to be counted.

Table 9–3 Create Corporate Count Request Screen, Count Request Information

Fields	
Priority	<p>Select the priority for the count request you are creating, if applicable.</p> <p>Valid values are Urgent, High, Normal, Low. This is used to group and sequence tasks for users. A task with 'Urgent' priority is assigned to the next available user.</p> <p>The default value is 'Normal'.</p>
Requesting User ID	<p>The current user id is automatically populated by the system.</p> <p>Enter the requesting user ID associated with the count request, if applicable.</p>
Start No Earlier Than	<p>The current system date is automatically populated.</p> <p>Enter a different start date and time for the count request, if applicable.</p>
Finish No Later Than	<p>Enter the end date and time for the count request, if applicable.</p>

After entering the relevant information in the above fields, the count request is created upon clicking the **Create** button. The [Corporate Count Request Details](#) screen is displayed.

10

Count Console Screens

The Count Console provides:

- Comprehensive visibility to corporate count requests created and the count requests generated for the corporate counts.
- Also provides visibility to count request status and the count results that are recorded.
- Extensive search capabilities using granular level information.

10.1 Corporate Request Search By All Attributes

You can search for corporate count requests by all attributes with the help of this screen.

Note: Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 10–1 Corporate Count Request Search By All Attributes

Fields	
Enterprise	Select the enterprise associated with the count request.
Request Type	Select the request type associated with the count request you want to search for, if applicable.
Request Name	Enter the count request name you are searching for, if applicable.

Table 10–1 Corporate Count Request Search By All Attributes

Fields	
Search In	<p>Choose the 'All Nodes' radio option to search for corporate count requests in all the nodes belonging to the enterprise.</p> <p>Choose the 'Specific Node' radio option and select the applicable node from the lookup, to search for corporate count requests in a specific node.</p> <p>Choose the 'All Nodes in Region' radio option and select the applicable region from the lookup, to search for corporate count requests in all nodes in a specific region.</p>
Item ID	Enter the item's item ID associated with the count you want to search for, if applicable.
Product Class	Select the item's product class associated with the count request you are searching for if applicable.
Unit Of Measure	Select the item's unit of measure associated with the count request you are searching for, if applicable.
Item Classification	<p>Enter the item classification associated with the count request you are searching for, if applicable.</p> <p>Note: A maximum of three item classifications may be displayed based on the Count Classifications configurations.</p>
Status	Select the status range of the count request you are searching for, if applicable.
Max Records	Enter the maximum number of records to be listed as a result of your search.

The [Count Request List](#) screen is displayed as a result of this search.

10.2 Corporate Count Request List

The Corporate Count Request List window displays the results of a count request search at the corporate level. You can perform actions on a single corporate count request or multiple corporate count requests by selecting the check boxes of the corporate count requests you want to

perform an action on and choosing the applicable action from the action bar.

Table 10–2 Corporate Count Request List

Actions	
View Details	This action takes you to the Count Request Details screen where you can view count request details for the selected count requests.
Cancel	This action takes you to the Cancellation Reason screen where you can enter appropriate reasons for cancelling the select count requests.
Fields	
Request Name	The request name associated with the corporate count.
Region / Node	The region or node for which the corporate count request was created.
Request Type	The request type associated with the corporate count.
Item ID	The Item ID associated with the corporate count request.
Description	The item's description.
Item Classification	The item classification associated with the corporate count request. Note: A maximum of three item classifications may be displayed based on the Count Classifications configurations.
Priority	The priority for the corporate count request.
Start No Earlier Than	The date and time after which the corporate count task will be suggested.
Requesting User ID	The user for whom the corporate count request is placed.
Status	The status of the corporate count request.

10.3 Corporate Count Request Details

You can view corporate count request details with the help of this screen.

Table 10–3 Corporate Count Request Details Screen, Primary Information

Actions	
View Node Requests	This action takes you to the Count Console List screen where you can view count requests generated based on the corporate count request. For more details about Count Console List screen, see <i>Yantra 7x Warehouse Management System User Guide</i> .
Cancel	This action takes you to the Cancellation Reason screen where you can enter appropriate reasons for cancelling the select count requests.
Fields	
Enterprise	The enterprise associated with corporate count request.
Node	The node for which the corporate count request was created.
Request Type	The request type associated with the corporate count.
Request Name	The request name associated with the corporate count.
Region	The region for which the corporate count request was created.
Status	The status of the corporate count request.

Table 10–4 Corporate Count Request Details Screen, Count Request Criteria

Fields	
Product Class	The item's product class. Indicates the item's inventory categorization. Orders are placed for an item and product class. Typical examples are IRREGULAR, FD (Factory Defects).
Item ID	The Item ID associated with the corporate count request.
Description	The item's description.

Table 10–4 Corporate Count Request Details Screen, Count Request Criteria

Fields	
Unit Of Measure	The item's unit of measure.
Item Classification	The item classification associated with the corporate count request. Note: A maximum of three item classifications may be displayed based on the Count Classifications configurations.

Table 10–5 Corporate Count Request Details Screen, Count Request Information

Fields	
Priority	The priority for the corporate count request.
Requesting User ID	The user for whom the corporate count request is placed.
Start No Earlier Than	The date and time after which the corporate count task will be suggested.
Finish No Later Than	The date and time before which the corporate count task is expected to be complete.

10.4 Count Request Search By Count Request Attributes

You can search for count requests by count request attributes with the help of this screen.

Note: Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 10–6 Count Request Search By Count Request Attributes

Fields	
Node	Select the node associated with the count request.
Enterprise	Select the enterprise associated with the count request.
Across Enterprise	Choose this option if you are searching for the count requests across enterprises.
Request Type	Select the request type associated with the count request you want to search for, if applicable.
Count Request #	Enter the count request number you are searching for, if applicable.
Requesting User ID	Enter the requesting user ID associated with the count request, if applicable.
Priority	Select the priority associated with the count request you are searching for, if applicable.
Start No Earlier Than	Enter the start date and time range for the count request, if applicable.
Finish No Later Than	Enter the date and time range by which the count request is expected to be complete, if applicable.
Status	Select the status range of the count request you are searching for, if applicable.
Max Records	Enter the maximum number of records to be listed as a result of your search.

The [Count Request List](#) screen is displayed as a result of this search.

10.5 Count Request Search By Count Criteria

You can search for count requests by count criteria with the help of this screen.

Note: Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 10–7 Count Request Search By Count Criteria

Fields	
Node	Select the node associated with the count request.
Enterprise	Select the enterprise associated with the count request.
Across Enterprises	Choose this option if you are searching for count requests across enterprises.
Request Type	Select the request type associated with the count request you want to search for, if applicable.
Count Request #	Enter the count request number you are searching for, if applicable.
Request Name	Enter the count request name you are searching for, if applicable.
Zone	Enter the zone associated with the count request you are searching for, if applicable.
Location	Enter the location associated with the count request you want to search for, if applicable
Pallet ID	Enter the container's pallet LPN associated with the count request you are searching for.
Case ID	Enter the container's case LPN associated with the count request you are searching for. Note: Either the Case ID or Pallet ID may be specified.
Receipt #	Enter the receipt number associated with the count request you are searching for, if applicable.
Item ID	Enter the item's item ID associated with the count you want to search for, if applicable.
Product Class	Select the item's product class associated with the count request you are searching for if applicable.
Unit Of Measure	Select the item's unit of measure associated with the count request you are searching for, if applicable.
Item Classification	Enter the item classification associated with the count request you are searching for, if applicable. Note: A maximum of three item classifications may be displayed based on the Count Classifications configurations.

Table 10–7 Count Request Search By Count Criteria

Fields	
Status	Select the status range of the count request you are searching for, if applicable.
Max Records	Enter the maximum number of records to be listed as a result of your search.

The [Count Request List](#) screen is displayed as a result of this search.

10.6 Count Request List

The Count Request List window displays the results of a count request search. You can perform actions on a single count request or multiple count requests by selecting the check boxes of the count requests you want to perform an action on and choosing the applicable action from the action bar.

Table 10–8 Count Request List

Actions	
View Details	This action takes you to the Count Request Details screen where you can view count request details for the selected count requests.
Cancel	This action takes you to the Cancellation Reason screen where you can enter appropriate reasons for cancelling the select count requests.
Fields	
Count Request #	The count request number associated with the count request. Click this link to view count request details.
Request Name	The count request name associated with the automatic cycle count request.
Location	The location identifier.
Enterprise	The enterprise associated with the count request.
Item ID	The Item ID associated with the count request.
Description	The item’s description.

Table 10–8 Count Request List

Item Classification	The item classification associated with the count request. A maximum of three item classifications may be displayed based on the Count Classifications configurations.
Priority	The count request priority.
Start No Earlier Than	The date and time after which the count task will be suggested.
Requesting User ID	The user who placed the count request.
Status	The count request status.

10.7 Count Request Details

You can view count request details with the help of this screen.

Table 10–9 Count Request Details Screen, Primary Information

Actions	
Cancel	This action takes you to the Cancellation Reason screen where you can enter appropriate reasons for cancelling the select count requests.
Fields	
Node	The node associated with the count request.
Enterprise	The enterprise associated with count request.
Count Request #	The count request number associated with the count request.
Request Name	The request name associated with the count request.
Request Type	The request type associated with the count request.
Pipeline ID	The pipeline identifier that the count request goes through.
Status	The count request status.

Table 10–10 Count Request Details Screen, Count Request Criteria

Fields	
Zone	The zone associated with the count request.
Pallet ID	The container's Pallet LPN associated with the count request.
Receipt #	The receipt number associated with the count request.
Location	The location Identifier associated with the count request.
Case ID	The container's Case LPN associated with the count request.
Product Class	The item's product class. Indicates the item's inventory categorization. Orders are placed for an item and product class. Typical examples are IRREGULAR, FD (Factory Defects).
Item ID	The Item ID associated with the count request.
Description	The item's description.
Unit Of Measure	The item's unit of measure.
Item Classification	The item classification associated with the count request. A maximum of three item classifications may be displayed based on the Count Classifications configurations.

Table 10–11 Count Request Details Screen, Count Request Information

Fields	
Priority	The count request priority.
Requesting User ID	The user for whom the count request is placed.
Start No Earlier Than	The date and time after which the count task will be suggested.
Finish No Later Than	The date and time before which the count task is expected to be complete.

Table 10–12 Count Request Details Screen, Count Request Details

Actions	
Accept Variance	This action takes you to the Acceptance Variance Reason where you can enter appropriate reasons for accepting the variance. For more details about Acceptance Variance Reason, see <i>Yantra 7x Warehouse Management System User Guide</i> .
Fields	
# of count results	The number of count results associated with the count iteration.
# of variances	<p>Number of variances associated with the count iteration.</p> <p>This link will be enabled only if the number of count variances is less than the maximum records displayed. Click this link to go to the Count Result List screen where you can view a list of count results for which you want to accept variance. For more details about Count Result List screen, see <i>Yantra 7x Warehouse Management System User Guide</i>.</p>
Count Accuracy	The percentage of the count result accuracy.

10.8 Cancellation Reason

You can cancel a count request with the help of this screen.

Table 10–13 Cancellation Reason

Fields	
Cancellation Reason Code	Select the reason code for cancellation of the count request.
Reason Text	Enter the reason for the count request cancellation.

Cancellation Reason

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